UNIVERSITY OF CAMBRIDGE
Information Services

University Training Booking System (UTBS)

UTBS New Provider Training

Administrator Training

Online

June 2020

Trainer: Simon Meaker – ssm38@uis.cam.ac.uk

University Information Service – Training Services

General Information

- ## Objectives

  To give you a good understanding of the UTBS system to the point where you can use the manual with confidence.

- ## Pre-requisites

  This course is for those people who are using or will be using the UTBS system.

- ## Duration & Break

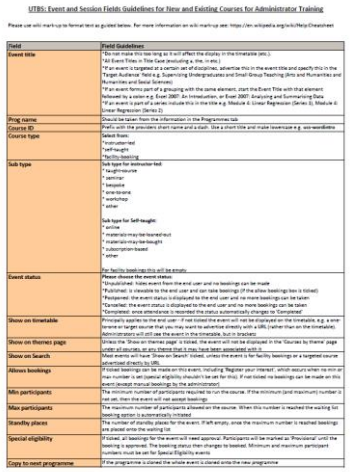
  We will have a 15-20min break halfway through.

- ## Delivery Style

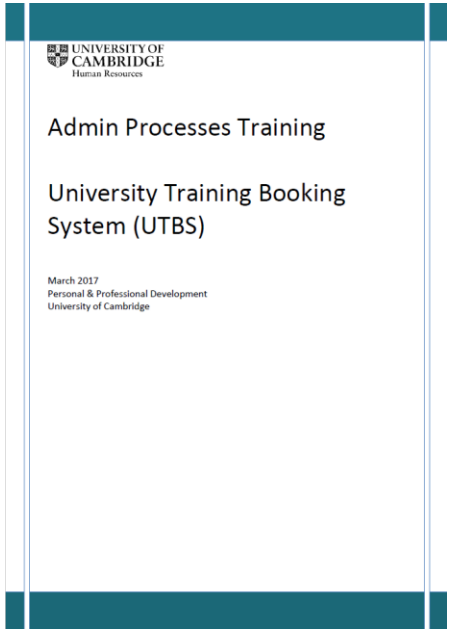
  I will talk through the PowerPoint slides and demo. You will then practice exercises from that section, or we will work through a practical exercise together.

Slides

Event Permissions Guide



Field Syntax Guide



Manual

General Information

Course Material

General Information

- Please fill in the Feedback form at the end of the course http://feedback.training.cam.ac.uk/uis
- Please ask questions (Use the hand gesture)
- If you need assistance let me know and we can have a separate breakout Quick Meeting

Introduction: UTBS

1. Introduction and background of UTBS
2. User Experience
3. Events
4. Sessions
5. Bookings
6. Emails
7. Reports

Introduction: UTBS

Key Contacts

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UAS Lead

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Introduction: UTBS Structure and Concepts

User

Trainer

Venue

Themes

Institutions

The UTBS Test Site

- Navigate to the UTBS Test Provider Training site at:
- https://utbs-training.csx.cam.ac.uk/

- Email address for use on training site:
- utbs.test@gmail.com

- CRSid's to use on training site:
  Yours, your neighbors, ap1000 to ap1099

User Experience

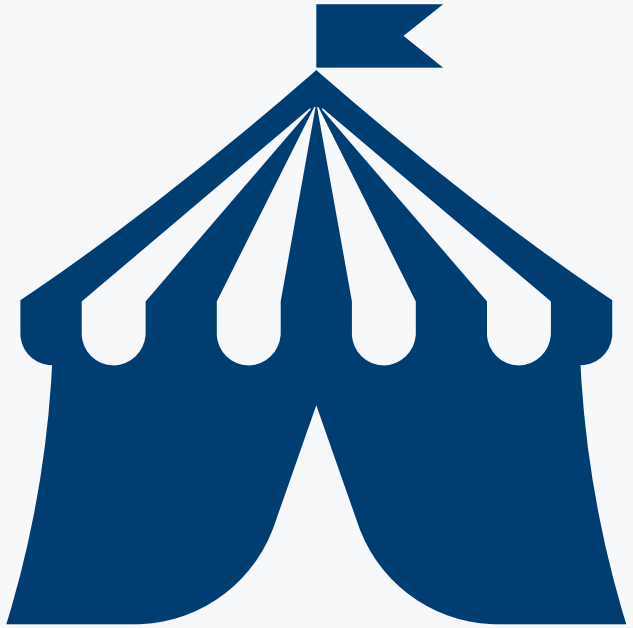
The User Experience

- Multi-provider toggle (p. 6)
- Timetable, Themes, Courses (pp. 8-10)
- Search (p. 8)
- Make a booking: select session, select institution, pre-req check (p. 11)
- Person page: lists training history across providers (pp. 4, 6, 7)
- Cancel booking: cancellation reason (p. 20)
- Email tab: view emails received
- House Style consistent across UTBS

Practice: User Experience

- Book onto a one-session event and a multi-session event (p. 11)
  - **Advanced Ballroom Dancing on 07/10/2020** (single session)
  - **Intro to Research on 03/09/2020** (multi-session)
- Use the **Search box** to find events (p. 8)
- View Your Bookings and Emails (p. 5)
- Cancel one of your bookings (p. 20)
- Update your special requirements (p. 13)

Events
(pg.'s 24-34)



Creating an Event (pg.’s 24-27)

- **In order to ensure uniformity across providers use UTBS House Style (see your Manager’s guide)**
- **Format with Wiki markup language (https://en.wikipedia.org/wiki/Help:Wikitext) except Joining Instructions which must be in plain text**
- **Course ID – links all events of a course together**
- **Event status:**
  - Unpublished, Published, Postponed, Cancelled, Completed
- **Event/course types:**
  - Instructor-led: Taught, Seminar, Bespoke, One-to-one, Workshop, Other
  - Self-taught: Online, Loaned out, Bought, Subscription, Other
  - Facility Booking
- **Event states: Scheduled (instructor led and facility booking) and unscheduled (self-taught)**

Creating an Event (pg.’s 24-27)

- **Events can have an associated:**
  - Administrator, Owner, Booked By, Trainer
- **Select whether to show on timetable, themes page (see your manual on how to add a course to a theme), search**
- **Allow bookings**
- **Extra Info field: User and Admin**
  - Allows for flexibility in creating another field to display information that other providers may not have e.g. PPD – Further Information and Feedback
  - It can be used as a workflow list if combined with Reports
  - Lots of other additional fields: Aims, objectives, related courses, joining instructions
- **Use URL links to events or web pages if applicable to aid navigation (p. 59):**

  External link: [http://www.cam.ac.uk The University of Cambridge]

  Internal link: [[event/78999 | Navigator: A Personal Development Programme]]

Deleting, Cancelling or Moving an Event

- **Delete**
  - Event status needs to be unpublished **before** it is deleted
  - If the last event of a course needs to be deleted it can only be done from the **course** page (you will be prompted)
  - Only delete if added by administrative error; otherwise cancel the course
- **Cancel (pp. 32-33)**
  - Record the reason in the Admin notes field and use the UTBS email template to send a cancellation email to participants
- **Move (p. 57)**
  - Effectively moves the course from one date to another.
    No trace left behind, and course participants are moved too.
    However….
- **You must then manually send emails notifying participants of the change using the UTBS template emails.**

Event:
New or Clone?

- **Creating an event: New (p. 24) or Clone (p. 27)**
  - If this is a new scheduled course, then create the course in the relevant programme, this will create the first event with that course id, add session times to schedule it
  - If you are not sure if it is a new course or if you already know there have been previous events created:
  - Use Search or Courses by Theme (p. 8) to find a possible match, ensure show unscheduled events is showing, if a match is found, clone the event (p. 27), edit and schedule as required
- **Compare button allows administrators to see differences between instances of the same course (p. 28)**

Practice: Event

- Create a new course in the Admin Training Programme for today (p. 24)
  - Use one that you will be entering from your current system
  - Add extra info fields for the user and extra admin info fields
  - Add additional topic sections
  - Refer to the style guide to check your formatting
- Experiment with Show in timetable, Show in Courses by Theme, Show on Search tick boxes
- ***If you have extra time: add the course to a theme using the instructions on p. 30 of your manual***

Sessions (pg.’s 25-26)

Sessions (pg.’s 25-26)

- **Instructor-led events and facility bookings become scheduled when session times are added**
- **Events can have multiple sessions**
- **Session types:**
  - Compulsory Sessions
  - Optional Sessions

Practice: Sessions

- Navigate to the Programme (p. 9)
- Add two compulsory sessions to the **HR Systems Demo unscheduled event** (pp. 25-26)
- Add another session and make it optional (pp. 25-26)
- Remember to use the clone button (p. 26)
- When finished, clone the entire existing **event** to the same Programme (pp. 26-27)

Bookings (pg.’s 11-22)

Viewing and Using Bookings

- Can be viewed using the event’s Bookings tab
- Can compose emails to those booked, waiting or interested using the event’s Bookings tab or its Emails tab
- Can record ‘Attendance’ and ‘Satisfied’ information by event or by session (pp. 43-44)

Managing Bookings (pp. 11-22)

- **Make booking (p. 11)**
- **Booking a third party on a course (p. 14)**
- **Booking a person onto a course in the past: non-booker (p. 19)**
- **Move a booking**
- **Managing special requirements (p. 13) (using a report p. 50)**
- **Managing fees**
- **Booking Admin Info - a useful place to record information:**
  - (Initial/date/comment) e.g.
    * SM 02/06/2020 Fee received, booking status updated to booked.

Practice: Bookings

- Book yourself on to an event (p. 11)
- Check how it displays in Your Bookings page (p. 5)
- Make a third party booking for the same event (p. 14) (NB do not use the ‘user override’ to do this)
- Viewing Bookings Tab for that event
- Create a new event with 2 optional sessions (schedule it for a date in the past, so you can record attendance) (pp. 24-26)
- Book yourself and your neighbour onto the event you created
- Record Attendance and Satisfaction (p. 43)

Practice: Bookings Cont…

- Book yourself onto this special eligibility event (p. 11):

  Football Fitness, 18/11/20

- Use **Book a Provisional Place** to make the booking
- Move the booking to the same event on **06/12/20**
- Cancel the booking (cancel is different from delete) (p. 20)

Emails (pg.’s 35-42)

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- **To send an email to people booked on an event (p. 36):**
  - Event/Bookings tab or Event/Emails tab
- **To view emails sent for an event or sent to a person:**
  - Event/Emails tab or Person/Emails tab
- **Disabling/enabling automatic emails for an event (p. 41)**

Please do read through the template emails available on UTBS as they could save you a lot of time and effort.

Practice: Emails

- Send an email to people who attended the event you created earlier, to remind them to complete the evaluation (p. 36)
- Send an email to external caterer for an event, using the utbs.test@gmail.com email address (p. 38)
- Check what emails have been sent to a participant (Person/Emails tab)
- Check what emails have been sent for an event (Event/Emails tab)

Reporting (pg.’s 48-53)

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- Over a hundred reportable fields
- Used to carry out regular admin tasks
- Used to generate statistical information
- Available in connection with different items e.g. session, event, person, theme, programme, venue, institution, course page, general (cross programme) (see p. 48)
- Standard reports to be run on a regular basis by administrators to assist with daily/regular admin
- Reports either come with the system or are built by the training provider manager (building reports is covered in the manager training)

Reporting: Regular Admin Tasks

All Providers

- Daily Check: Bookings Special Requirements (p. 50)
- Daily Check: Bookings Requiring Approval (p. 49)
- Daily Check: Event Attendance Not Yet Updated (p. 51)
- Daily Check: Daily Check: Events with Low Numbers (p. 51)
- Event/Session register (p. 52)
- Event participant list (p. 52)

Reporting: Regular Admin Tasks

Provider specific examples:

- Admin work list
- Daily Check: Bookings Payment Chasing
- Eligibility checks

Plus others as required

Practice: Reporting

- Find which bookings need approving in the programme (pp. 49-50)
- Approve a booking (pp. 49-50)
- Check if there are any special requirements and add a note to say one has been actioned (pp. 50-51)
- Find the report which enables you to check which events have not had their attendance updated (p. 48)
- Print preview an event register and a session register (p. 52)

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Thank you