UNIVERSITY OF CAMBRIDGE
Human Resources

Admin Processes Training

University Training Booking System (UTBS)

March 2017
Personal & Professional Development
University of Cambridge

Admin Processes Training on University Training Booking System (UTBS)

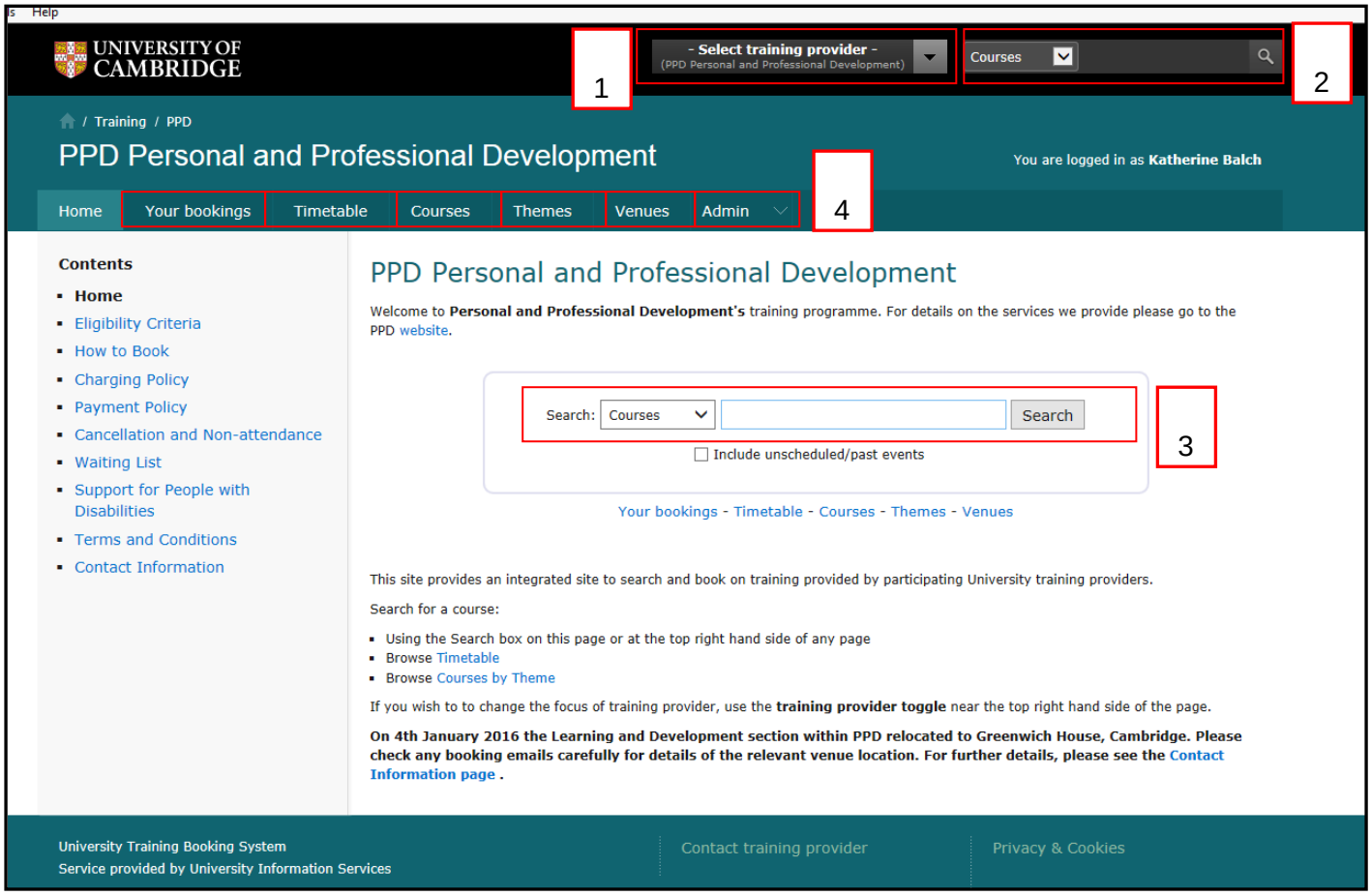
1 Overview of Home Screen 3
2 Logging in to the system 4
3 Provider Toggle 5
4 People search 6
5 Searching for a course 8
6 Timetable 10
7 Bookings 11
7.1 Book yourself on to an event 11
7.2 Special requirements 13
7.3 Make a third party booking 14
7.4 Special eligibility events where attendance requires approval (booking status = provisional) 18
7.5 Expressing interest in a course 19
7.6 Registering non-bookers (post event start) 19
7.7 Cancel a booking 20
7.8 Swap an existing booking for a new booking (for an event which is full) 21
8 Programmes 23
9 Events 24
9.1 Create a new event 24
9.2 Create session(s) for an event 25
9.3 Events which do not require bookings 26
9.4 Event clashes 27
9.5 Cloning and editing an event 27
9.6 Comparing and updating events/sessions (to make amendments) 28
9.7 Add an event to a theme 30
9.8 Add an extra event to meet demand 31
9.9 Cancelling an event 32
9.10 Add and edit a new venue 33
10 Emails for events 35
10.1 Manually sending an email for an event 36
10.2 Manually sending an email to someone who is not a participant or tutor (e.g. a catering confirmation) 38
10.3 Sending manual booking emails 38
10.4 Joining Instructions 39
10.5 Reminder email 39
10.6 Offer a cancelled place to the waiting list 39
10.7 Sending a Venue Confirmation email 40
10.8 Trainer Confirmation 41

Copyright © 2010 University of Cambridge

10.9 Disabling/Enabling Automatic Emails for an Event ... 41
11 Record attendance and assessment ... 43
11.1 Recording attendance - for single session events ... 43
11.2 Recording attendance - for multi session events ... 43
11.3 Recording Assessment ... 44
12 Managing the wait list once a course has run ... 45
12.1 For courses with repeats ... 45
12.2 Moving a booking ... 46
13 Reporting ... 48
13.1 Daily check: bookings requiring approval (for events with status = special eligibility) ... 49
13.2 Daily Check: Bookings Special Requirements ... 50
13.3 Daily Check: Bookings Eligibility Check on Events Marked Special/External Events ... 51
13.4 Daily Check: Event Attendance Not Yet Updated ... 51
13.5 Daily Check: Events in the Future with Standby or Wait List and Daily Check: Courses (All) with a Standby or Wait List ... 51
13.6 Daily Check: Events with Low Numbers ... 51
13.7 Printing a register/participant list ... 52
14 Manual Administration ... 54
14.1 Promoting People on the Waiting List ... 54
14.2 Granting 3rd party booking privileges to none TP staff ... 55
14.3 Manually changing a booking status ... 56
15 Postponing and Re-scheduling Events ... 57
15.1 Postponing the event without yet knowing a future date ... 57
15.2 Postponing and rescheduling an event in one go ... 58
16 Adding Links to Text Fields ... 59
16.1 Internal Links ... 59
16.2 External Links ... 59
16.3 Mailto Links ... 59

Copyright © 2010 University of Cambridge

1 Overview of Home Screen

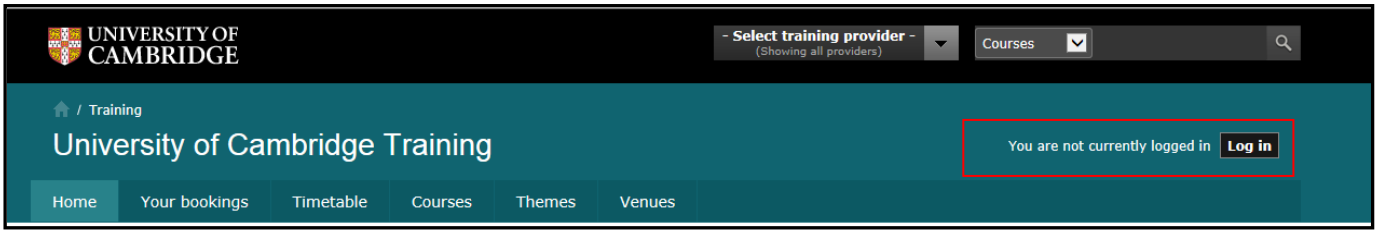


1. Enables you to select the training provider
2. Enables you to search by: course, programmes, themes, venues and people
3. Enables you to search (as above), but additionally include unscheduled/past events
4. Opens up other pages of the system: Your bookings, Timetable, Courses, Themes, Venues, Admin

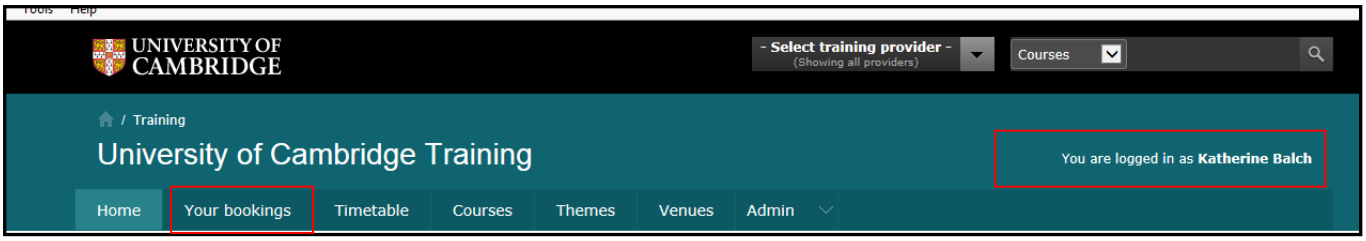
Copyright © 2010 University of Cambridge

2 Logging in to the system

- Current training site: https://utbs-training.csx.cam.ac.uk/
- Live site: https://www.training.cam.ac.uk/
- Click on the **Log in** button on the top right of the screen



- Enter your **Raven id and password**. You will be taken back to UTBS and the top right hand corner will now say 'You are logged in as xxxxx'
- Click on your **name**. This will take you to your 'Your Bookings' page (which can also be accessed by clicking on the **Your Bookings** tab on the left of the screen)

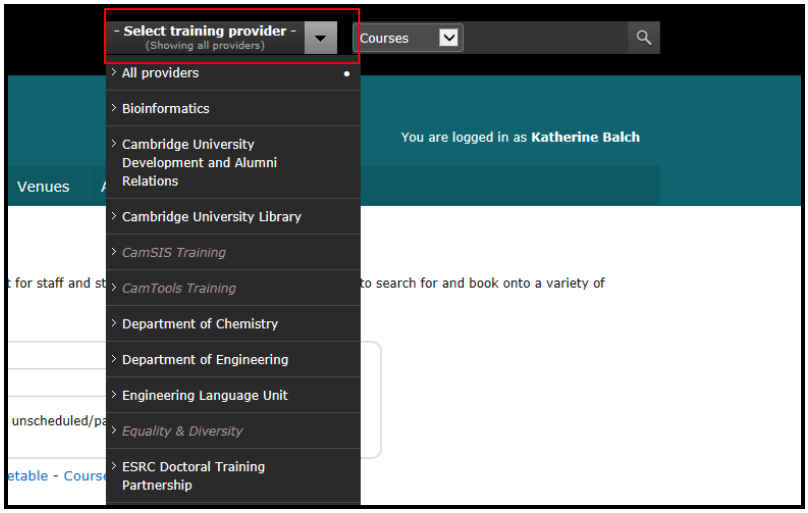


- Check your **Personal details** are correct (these come from Lookup). If they need amending select the **Edit** button to update and save

Copyright © 2010 University of Cambridge

3 Provider Toggle

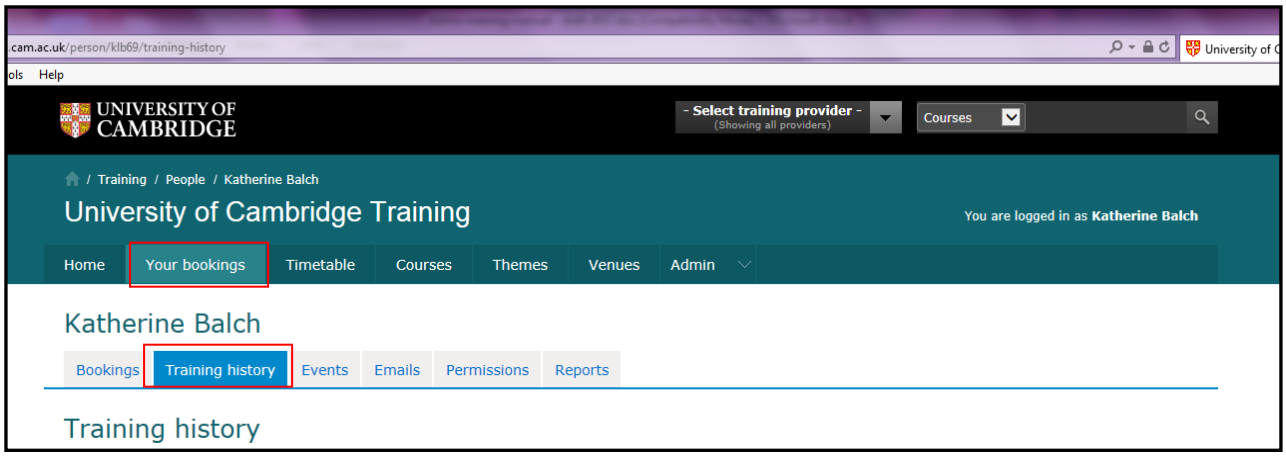
- This is located at the top right of any screen
- It allows you to refine any information you see to contain only your provider's information



Best practice

*Select your provider as soon as you log in to the system. This will ensure you are accessing the training provision for your provider (if you select **All Providers** you may not have the privilege to carry out particular actions across all providers, therefore the system will show you an error message)*

1. Click on **Your bookings** followed by the **Training history** tab

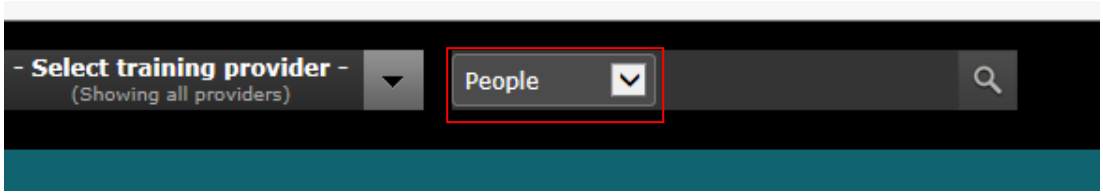


You will notice that this shows bookings for all providers. Now change the provider toggle to your provider. This now shows bookings for your provider only

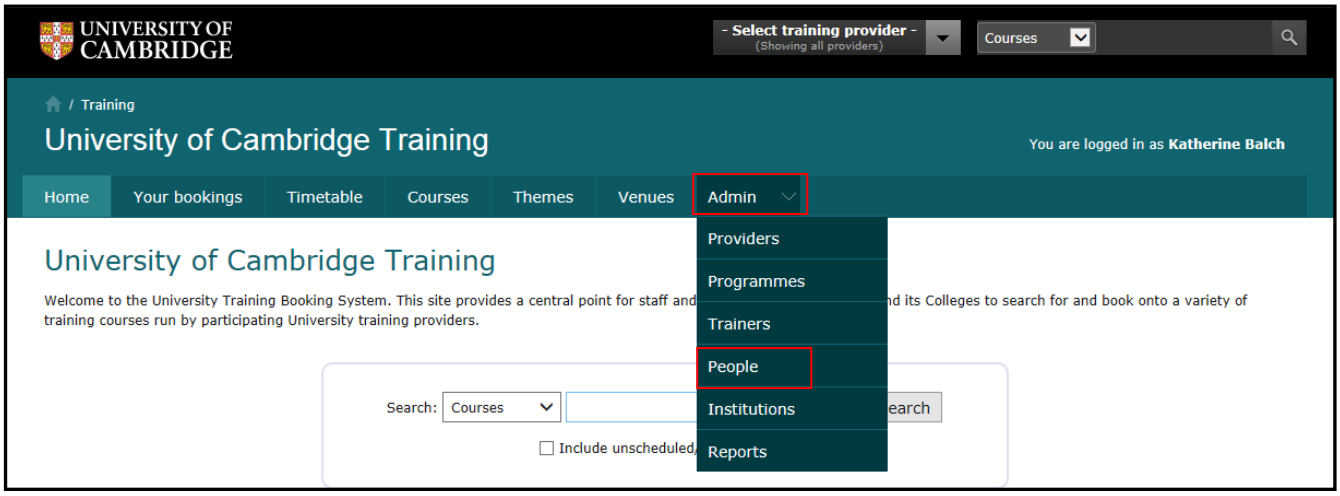
4 People search

- There are two ways to do this:

2. Use the search box on the top right of the screen. Select **People** from the dropdown options and enter the person's CRSid or full name



3. Within the **Admin tab** select **People**. A search box opens where you can enter the person's CRSid or full name



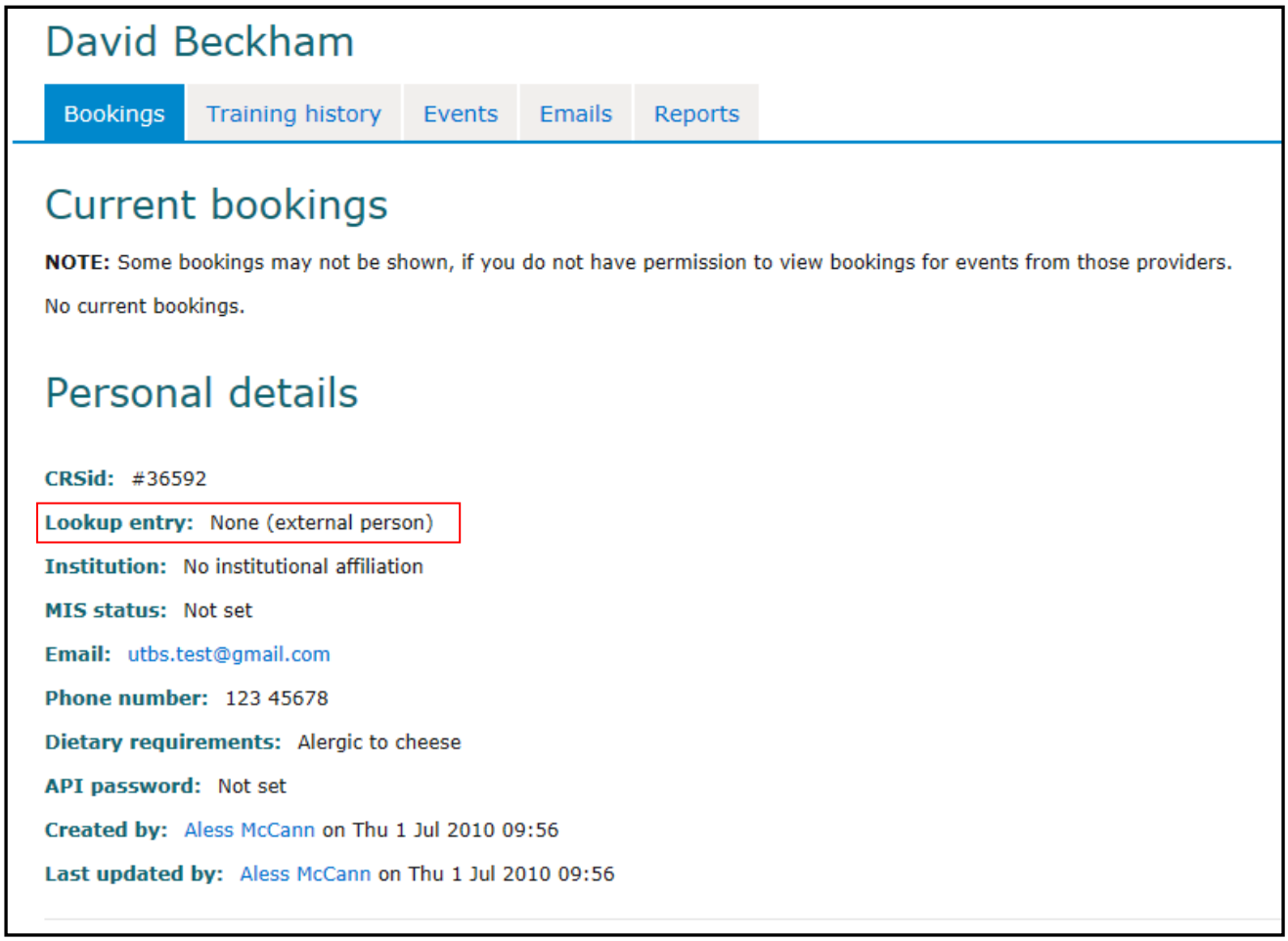
- Click on the person's **name** to see bookings page. This shows personal details including: CRSid, Lookup entry, Institution, MIS status, email, phone number, created and last updated by

Best practice

If you know the person's CRSid use this to search – it will be quicker and ensure you have the correct person (if there are two or more people with the same name)

- External people can be added to the system

1. Search for David Beckham and click on his name. You will see that his Personal details say: Lookup entry: None (external person)

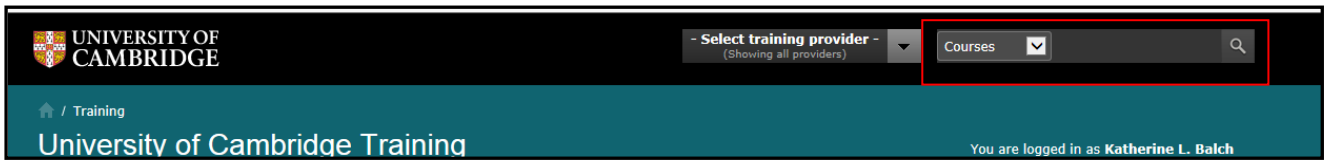


- How to add an external person on to the system is covered in the Bookings section

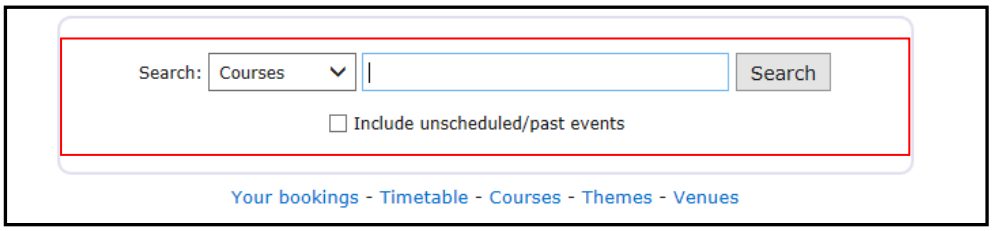
5 Searching for a course

There are several ways to search for a course:

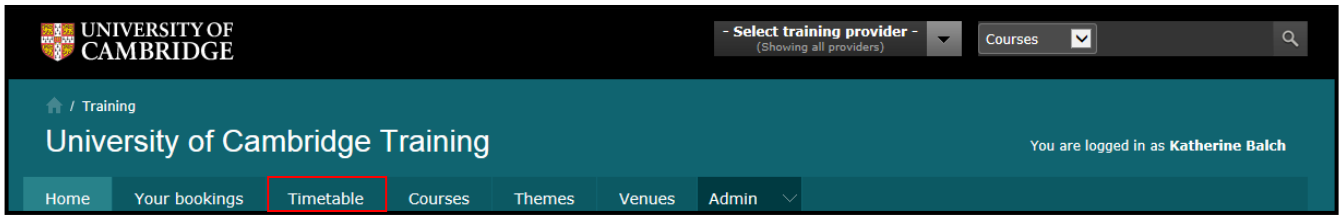
1. The **search** box on the top right of any page. Be sure to select **Courses** from the dropdown options



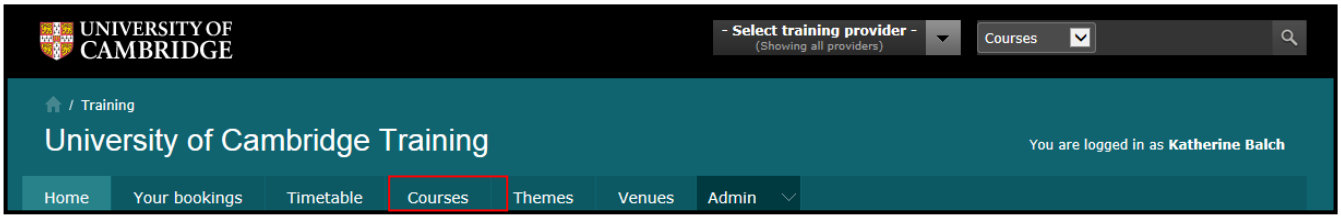
2. The large **search box** on the home page. Before you select your training provider you can use the drop down list to search all courses, or choose themes, programmes etc.



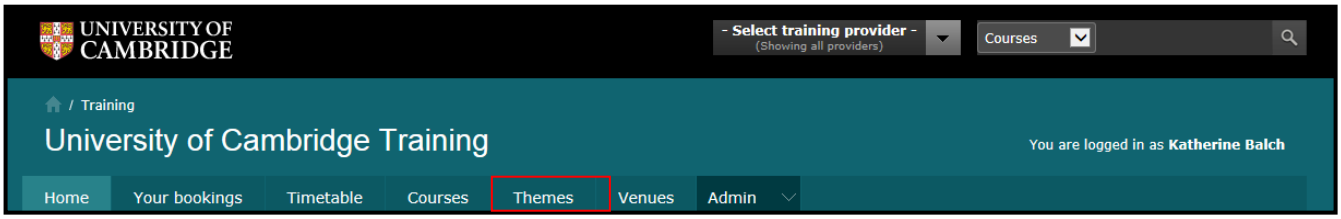
3. The **Timetable** tab at the top of the page enables you to search for a course by the date it's running



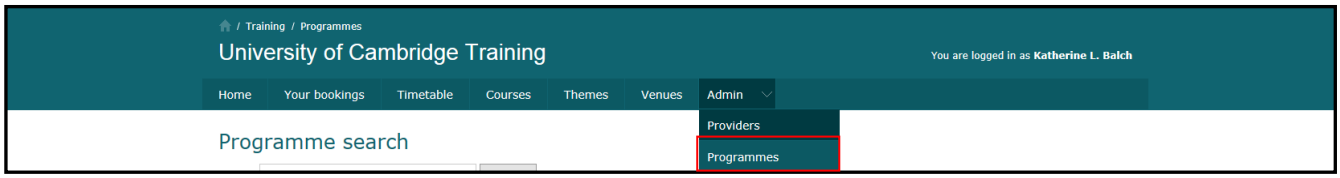
4. The **Courses** tab enables you to browse through courses or search by provider and course title.



5. The **Theme** tab at the top of the page enables you to search by provider and theme

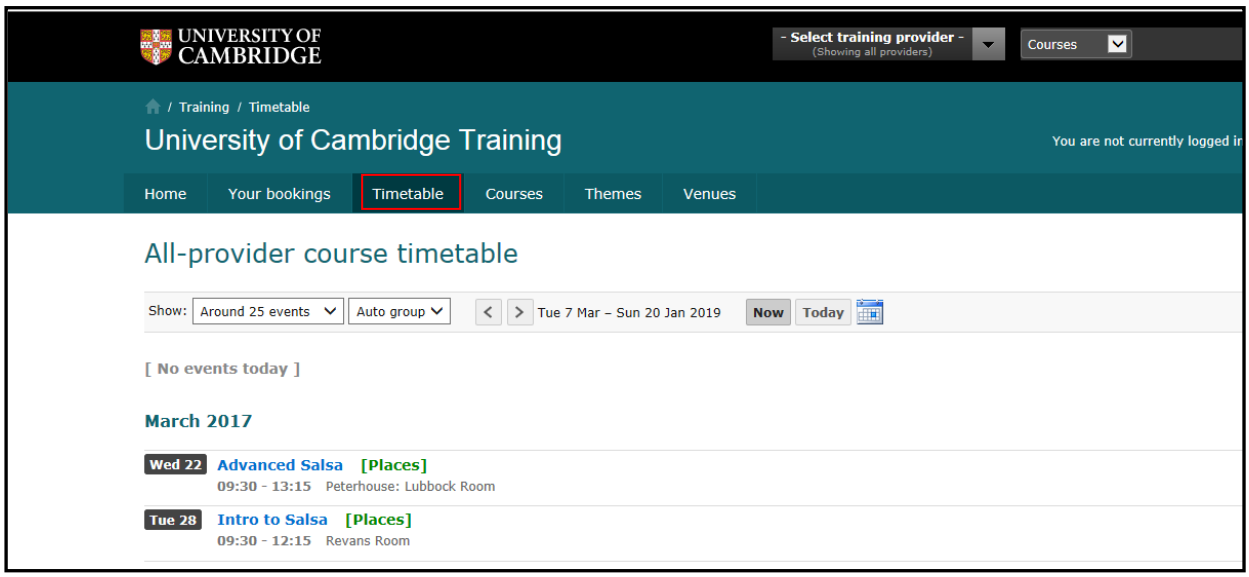


6. In the **Admin list** - select **Programmes,** enabling you to search in programmes

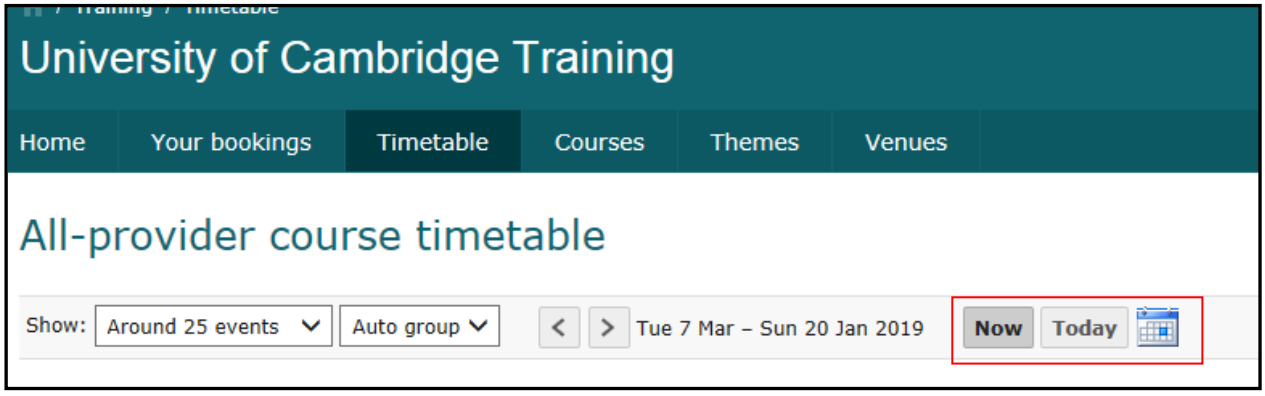


6 Timetable

- The **Timetable tab** lists future courses in date order



- You can use the **calendar** to view events in the past, or at any given date in the future

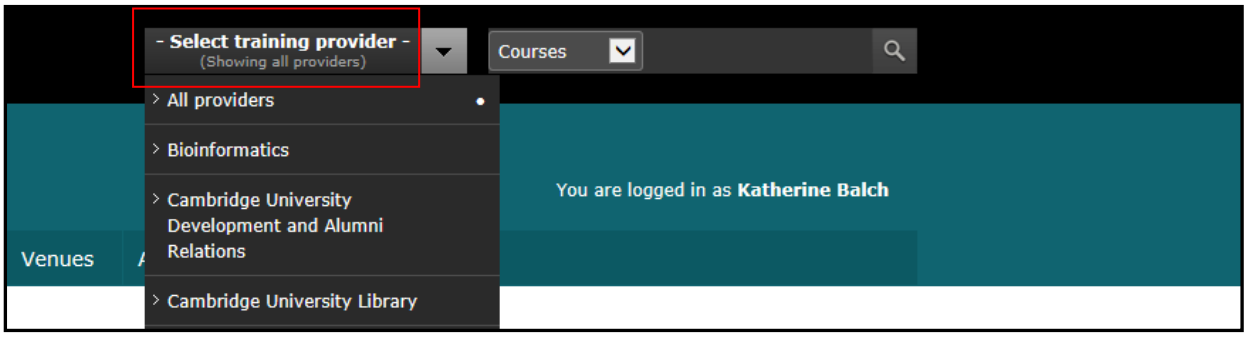


7 Bookings

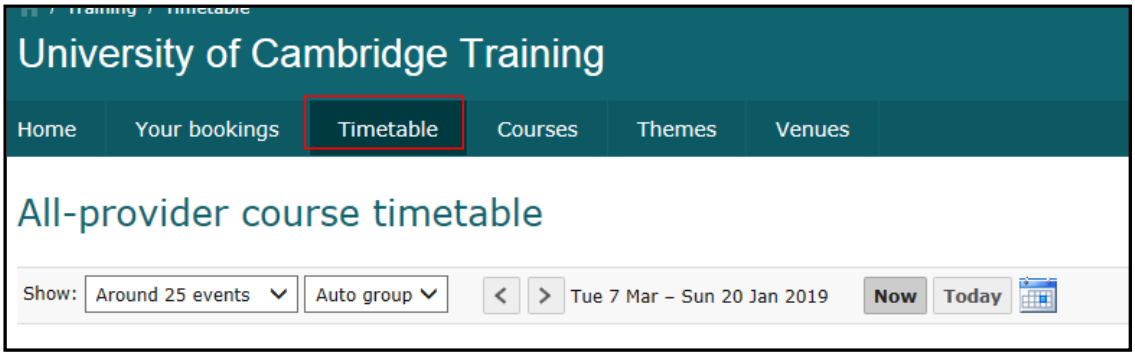
- Internal participants are able to book themselves on courses using their CRSid and Raven password

7.1 Book yourself on to an event

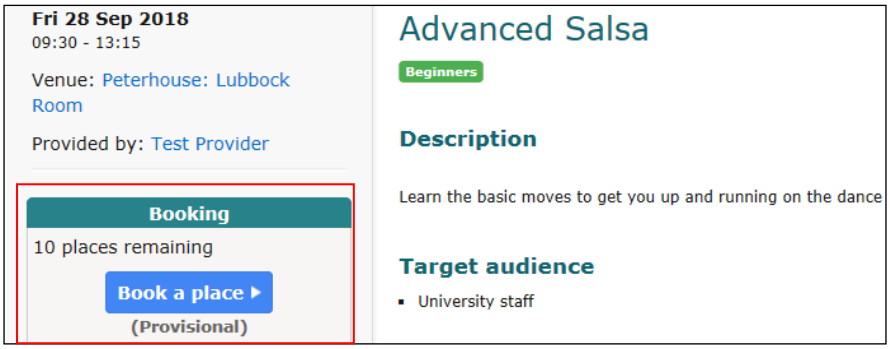
7. Log into UTBS
8. Select the relevant **training provider**



9. Click on the **Timetable** tab



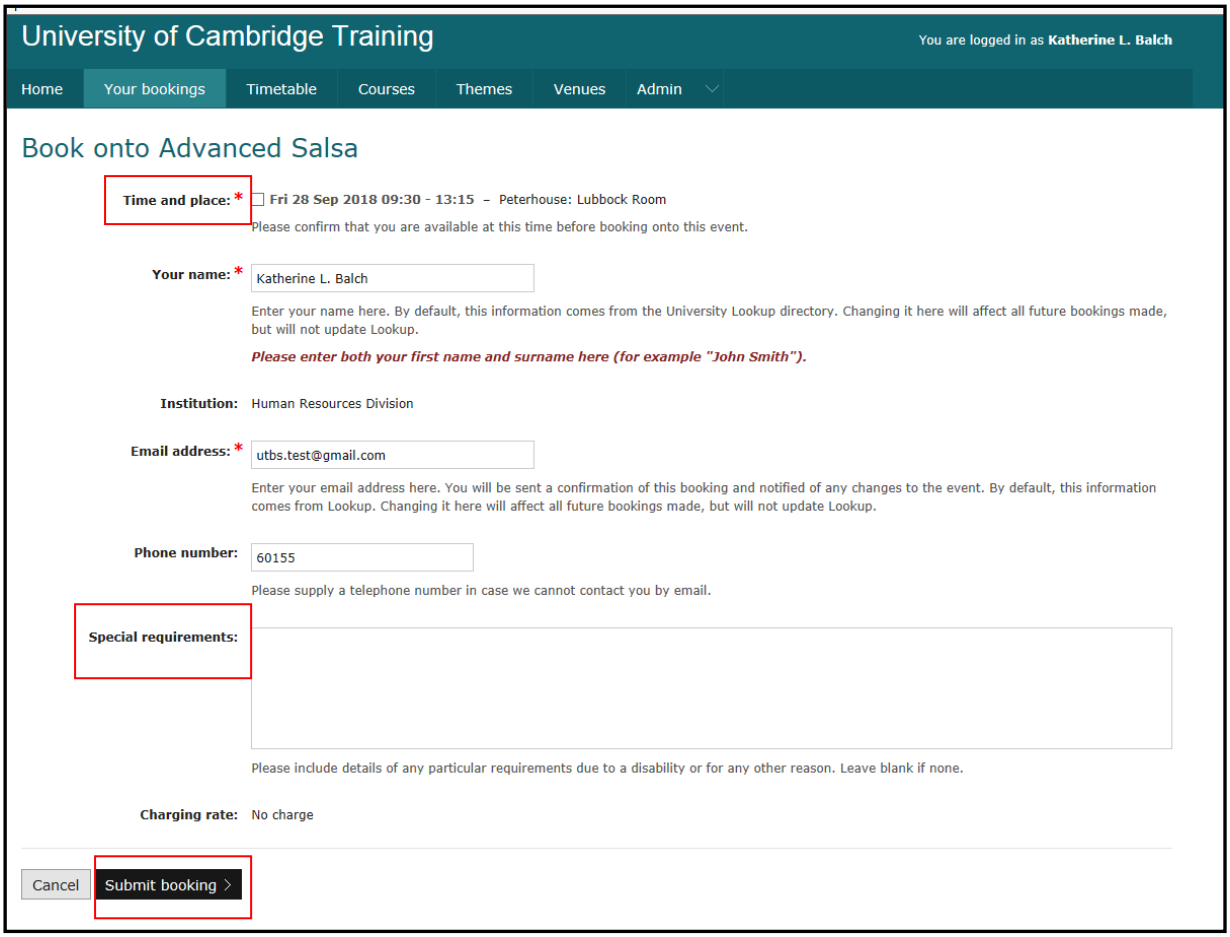
10. Click on a **course title**, e.g. Advanced Salsa on 28 September 2018
11. Click **Book a place** in the booking box at the left of the screen which says 10 places remaining



12. Tick the **Time and place** box to confirm you are available to attend the event and enter any **Special requirements**, e.g. dietary

13. Check that your details are correct

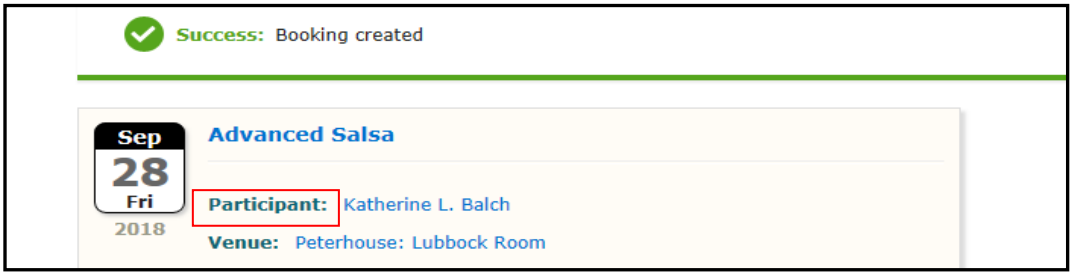
14. Click the **Submit booking** button



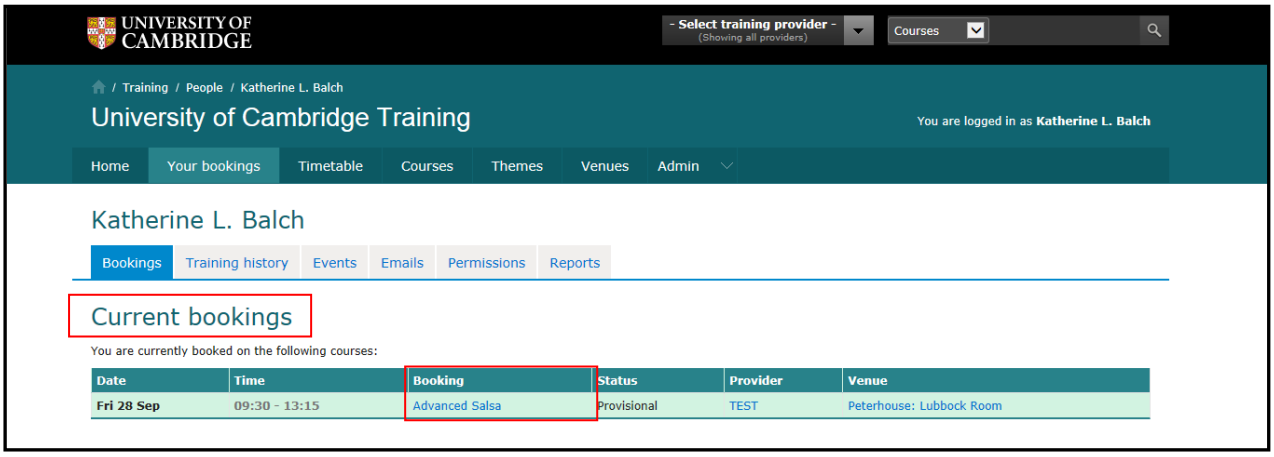
- A box will appear informing you that you have successfully booked onto the course

Note: *Bookings on this event require approval by the event administrator*

15. Click on your name on this Booking page (where it says **Participant**)



Your booking will now be listed in your current bookings



Tip: *You can review all of your bookings (past and future) by selecting the* ***Your Bookings*** *tab at the top of any page at any time. Past bookings will appear when you select the Training History tab within '****Your Bookings****'*

Note: *When an event has more than one session, you will need to select that you can attend all compulsory sessions when you make a booking, in order for the booking to be accepted.*

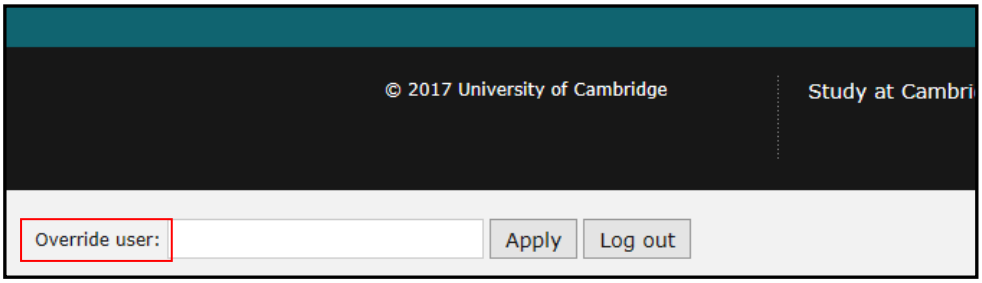
Note: *Participants can belong to multiple Institutions. In this case, when they make a booking they will be asked to choose which institution they would like their booking to be associated with.*

Note: *Users cannot make bookings on a later session of a multi session event after the first session has run. Administrators can do this.*

7.2 Special requirements

These can be updated in a user's person details page or within a booking for a particular event.

1. Go to **Override user** at the bottom left of the screen and enter your own CRSid. Click **Apply**



2. Go to the **Your bookings** tab and select the **Edit** button at the bottom of the page

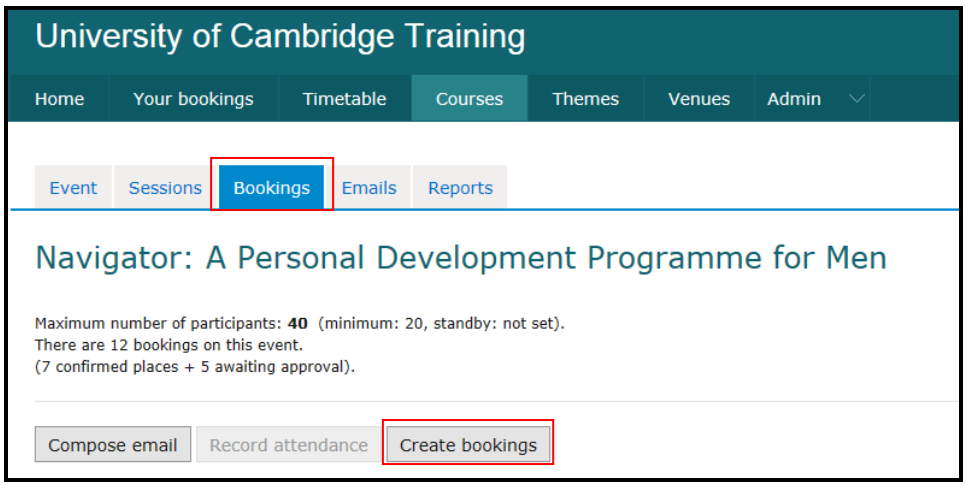
3. Add in the **Special requirements** 'no fish' and **Save**

- Go to the booking you already made – note that it will not have updated your special requirements
- Make a **new** booking for a different course – note that your updated special requirement will appear in the booking page
- To update your special requirements in an existing booking you need to go to **Edit details** of that booking and update your special requirements
- Update your special requirements in your existing booking to say 'no fish'
- The process for checking and actioning special requirements is covered in reporting

7.3 Make a third party booking

For internal participants (e.g. if you have a list of names from a department who need booking on to a course):

1. Navigate to the **event** you wish to make a booking for
2. Click on the **Bookings tab**
3. Click on the **Create bookings** button



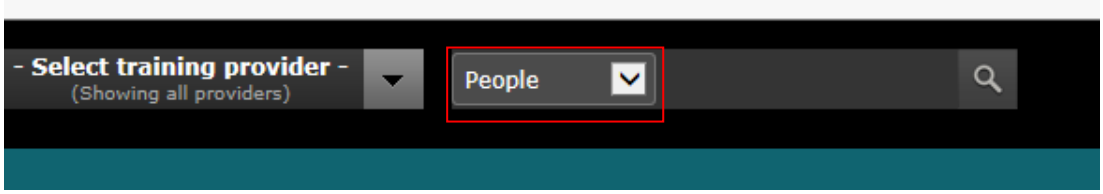
4. Enter each **participant's CRSid** and hit enter or click the **Add** button
5. Fill in any additional information e.g. special requirements, Institution
6. Un-tick the 'send confirmation email' box if you **do not** wish to send a confirmation email, e.g. if the event has already taken place
7. Click the **Make bookings** button
8. Your bookings will have been added to the event

Note: *if you make more bookings than there are places available the bookings will be made as waiting list places, not confirmed bookings, as appropriate*

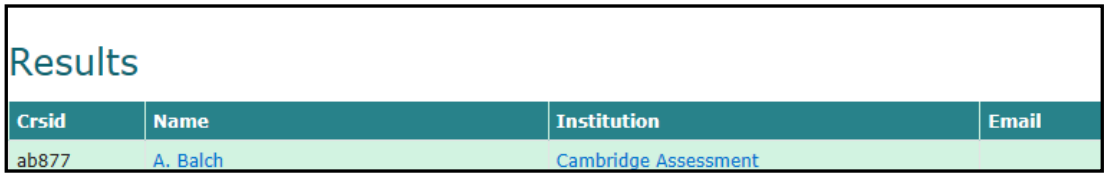
Note: *this can be done after the event has run e.g. for drop in events, where participants were not required to book before attending an event*

There is also an alternative way to make third party bookings:

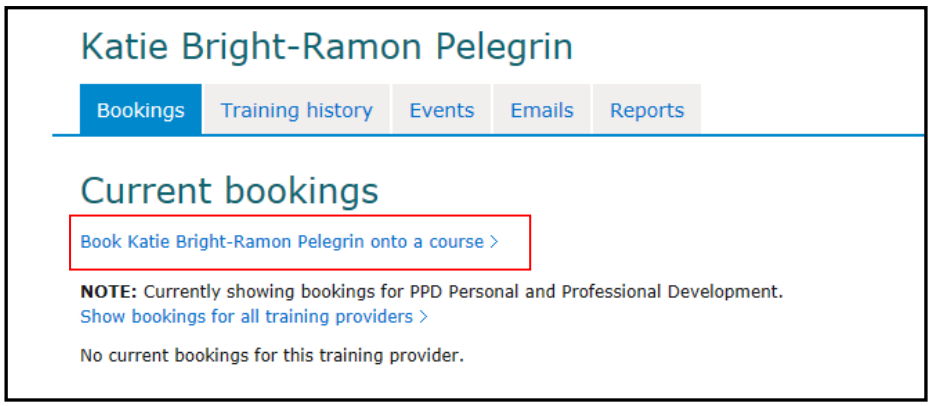
1. Use the search box on the top right of the screen. Select **People** from the dropdown options and enter the person's CRSid or full name



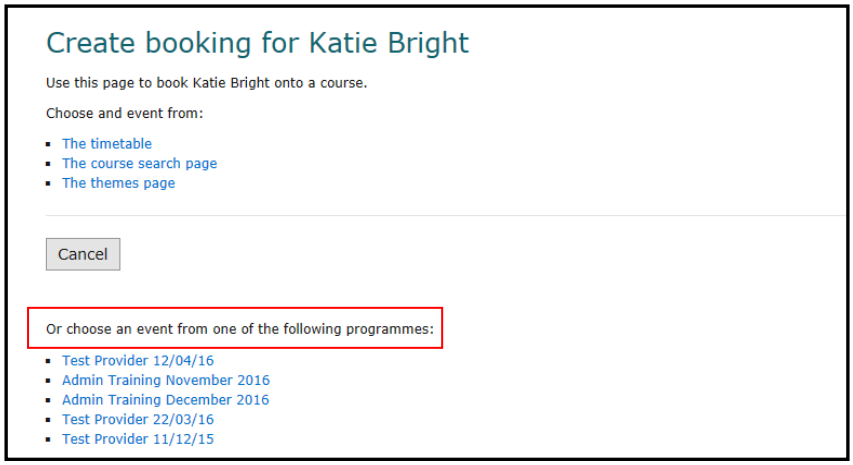
2. Click on the correct person's name



1. Under **Current Bookings** click on 'Book xxxx on to a course'. If you do not see this option make sure your **Training Provider** is selected.



2. Select the **Programme** the course is in



3. Click on **Book place** for the event you wish to make the booking for

- Alternatively:
  - If it is a future event with a wait list it will display (**Full**) and provide the option of **Book onto waiting list**
  - If it is a future event which has the option **Allow bookings** disabled it will display (**Not taking bookings**) and provide the options **Register interest | Book Place**
  - If it is a past event the event will say (**Not taking bookings**) and provide the options of **Register interest | Book Place** (typically for registering non-bookers)
  - If the event is unscheduled e.g. self-taught (with a max set) then it will display (**Not taking bookings**) and offer **Register interest | Book place**

4. Tick the date(s) the participant will attend

5. Check there is an email address listed and all details are correct

Copyright © 2010 University of Cambridge

6. Add any special requirements

7. Leave the **Send confirmation email** box selected

Typically, confirmation emails should be sent however there are instances where 3rd party bookings do not require a confirmation email to be sent. Some examples are:

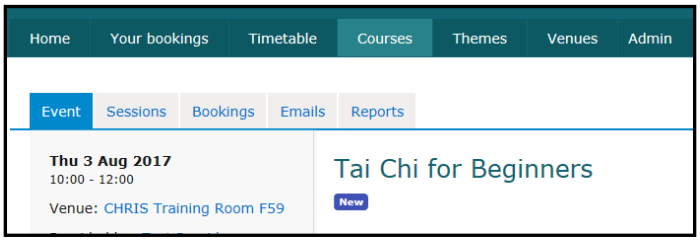
- For events where the administration is all being done manually by the administrator and no booking confirmations should be sent
- When cancelling a booking and no notification to the participant is required
- Registering non-bookers post event start

If you deselect the **Send confirmation email** box, the participant will not receive an email to tell them they have a booking. However, they **will** receive any other automated emails that the system is set to send out.

Note: *If the event has emails disabled at the event level then by default the Send confirmation email setting booking will not be ticked. However, should this setting be actively ticked then the email confirmation will be sent*

8. Click submit booking button. The 'Booking created' page appears

To check the booking has been made, click on the event title then the **Bookings** tab. The name of the person you have just booked on is listed

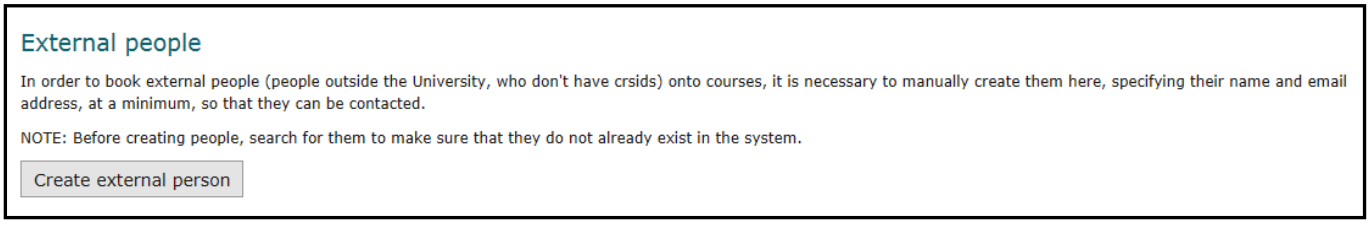


For external participants (and external tutors):

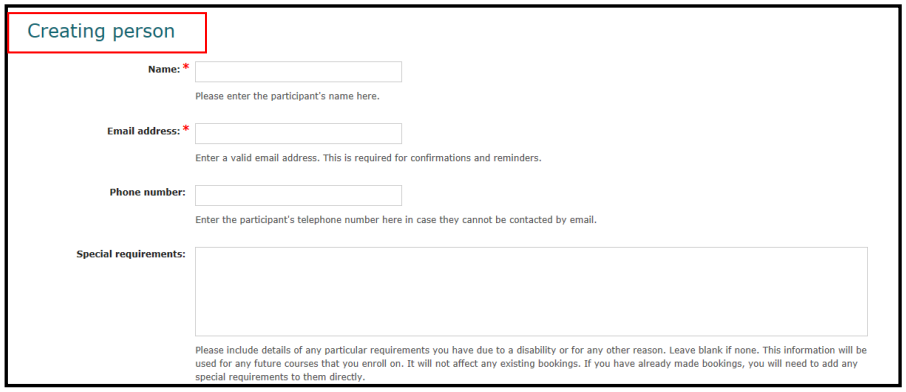
1. Search for their last name using the **People** option in the Admin list

No results will be found (or there may be other people with the same surname but not the exact person you are looking for)

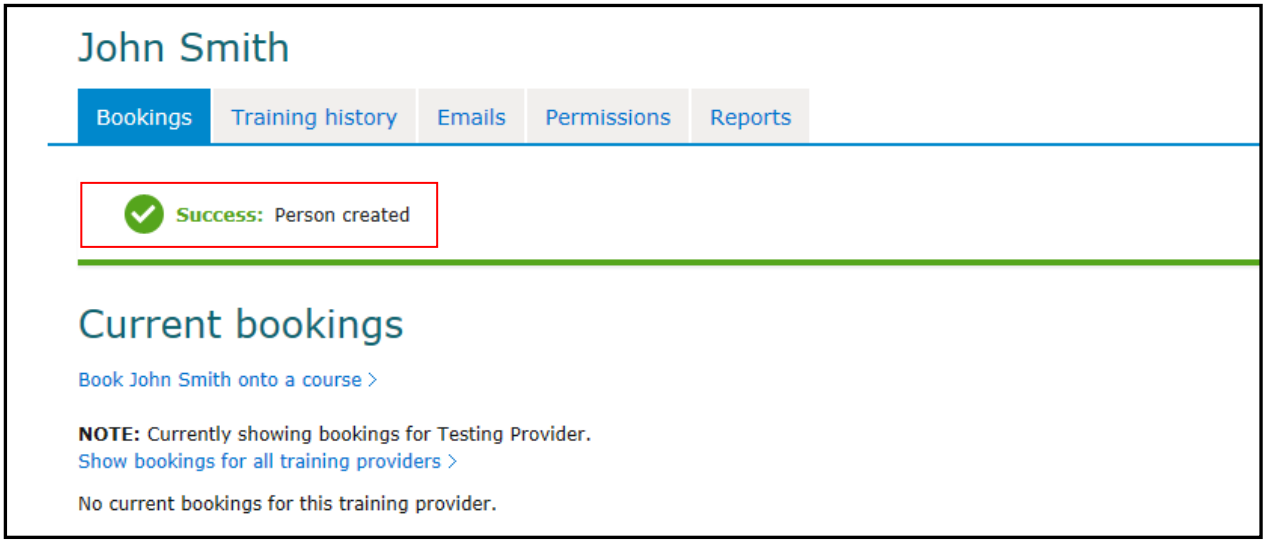
2. Select the **Create external person** button at the bottom of the screen



3. Add in the full name, email address (use your own for training purposes) and phone number and any other relevant details and click **Save**



- The 'Person created' page will appear



You can now book that person on to a course in the same way as you would book an internal person on (as the system has allocated them a unique ID number)

- You also use this process to add a new external tutor

7.4 Special eligibility events where attendance requires approval (booking status = provisional)

- Book participants on as 'provisional' using the following procedure:

1. **Search** for the participant CRSID or surname
2. Click on the **Name** of the participant
3. Click on **Book xxx onto a course**

Copyright © 2010 University of Cambridge

4. Select the **programme,** a list of events will be displayed
5. Identify the event and click on **Book provisionally**
6. **Tick the date(s)** on which they wish to attend
7. Complete any other relevant details
8. Make sure the **Send confirmation email box** is ticked (at the bottom of the page)
9. Click **Submit booking**

- This procedure can also be used when you are waiting until a later date to decide who will be allocated places e.g. for an event where attendance is by nomination

7.5 Expressing interest in a course

- If a participant would like to attend a course but cannot make any of the dates currently scheduled they can be booked on using **register an interest** on the event page
- A participant can only have their interest registered once per course (the link to the interested booking shows up no matter which event you view)
- They can also be **booked** onto any event of the course, in addition to having registered an interest, if they wish
- **Cancelling** a registration of interest booking **deletes** the booking, rather than leaving a cancelled booking behind
- On the person's **Your Bookings** page, courses that they have registered an interest in show up in a separate list (below their current bookings)
- Providers may use reports on this status to inform whether or not to put on additional events
- Providers may wish to contact all those who have expressed an interest to inform them of any additionally scheduled events

7.6 Registering non-bookers (post event start)

- For use when people have turned up without booking on an event (non-bookers)

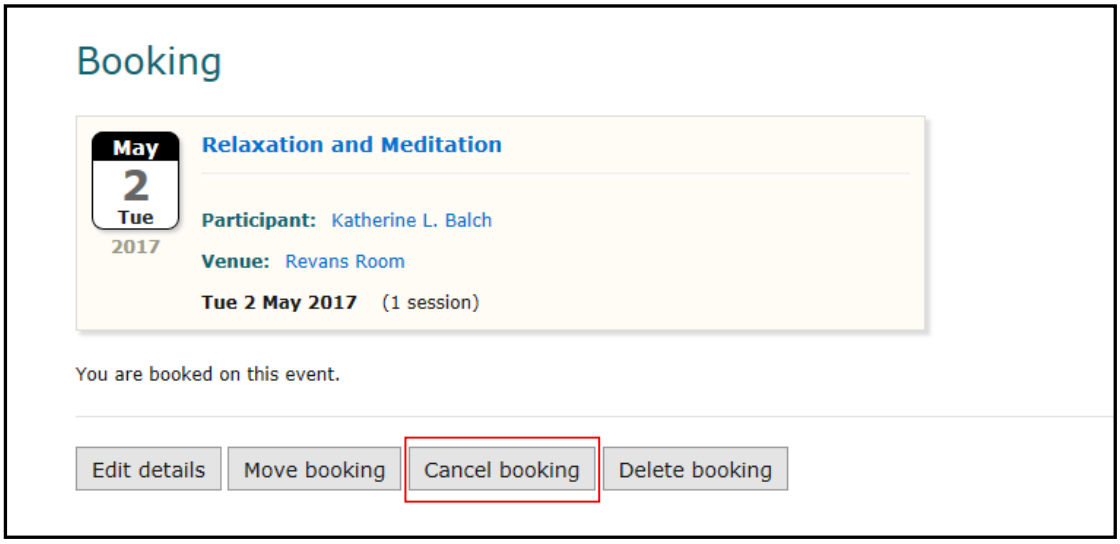
1. Book all the non-bookers on to the event (using the procedure Making a 3rd party booking)
2. Navigate to each non-booker's booking (e.g. by clicking on their name in the list on the **Bookings tab** page)
3. Click on **Edit details**
4. Click on the **Administrative information** quick link (at the top of the page)

Copyright © 2010 University of Cambridge

5. In the **Admin Notes**: enter your initials and date followed by Non-booker e.g. MG 12/12/2016 Non-booker
6. Click **Update booking**
7. Repeat this for all the non-bookers for that event and make a note of their CRSids
8. Send the **Course non-booker email** (via the **Emails tab**) to all those that didn't book (see the section on Emails for details of how to do this)

7.7 Cancel a booking

1. Type in the participant's CRSid (or surname) using the search box (top right)
2. Click on the correct person's name
3. Click on the event title you wish to cancel the booking for
4. Click on **Cancel booking**



5. Select the **Reason for cancellation** from the booking list
4. Leave the **Send confirmation email** box selected
5. Click **Cancel booking**

- Typically, confirmation emails should be sent when cancelling a booking, however there are instances where booking cancellations do not require a confirmation email to be sent.

***Note**: There is another way to cancel a booking, using the edit booking button and changing the status to cancelled, but this does not then report the reason so should **NOT** be used*

7.8 Swap an existing booking for a new booking (for an event which is full)

- To be used when someone has made a booking for a member of the University using their own CRSid, rather than the CRSid of the member of staff and the event is full
- Should the event not be full, delete the incorrect booking and make a 3rd party booking for the correct participant using their CRSid
- The following process should be done all together without any time delay

1. **Search** for the correct participant CRSid or surname
2. Click on the **Name** of the participant
3. Click on **Book xxx onto a course**
4. Select the **programme,** a list of events will be displayed
5. Identify the event (it should say 'not taking bookings', as it is in the past)
6. Open UTBS in a **new tab/window**
7. In this new tab, navigate to the **Event** concerned
8. Click on **Edit** and increase the **Maximum number of participants** by 1 (e.g. if it was 25 then change to 26)
9. Under **Automated emails**, un-tick the **Confirmation - Booking** (this is in case someone tries to make a booking in the time between you increasing the maximum number and making the 3rd party booking)
10. Make a note in the event **Admin notes** (state initial, time and date) that you have increased the maximum number and turned off the auto email **Confirmation - Booking** in order to swap the booking (name the booking) e.g. **MG 12/12/2016 Maximum no. increased and auto email disabled in order to swap** [[person/x | x]] **with** [[person/y | y]]'s **booking**
11. Click **Save**
12. Go to the other **Tab** which has the 3rd party booking open in it
13. **Refresh** the screen (F5)
14. The event should now have changed from **Book onto waiting list** to **Book place**
15. Click **Book place**
16. Keep the box ticked which says **Send confirmation email** (an email will be sent to the participant to confirm their booking)
17. Click on **Submit booking**
18. Click on the **Event** name to go back to the event

Copyright © 2010 University of Cambridge

19. Click **Edit** and change the **Maximum number of participants** back to what it was (i.e. decrease by 1) and tick the **Confirmation - Booking** to re-enable it

20. Check the **Bookings tab** of the Event for any bookings which have come in since you increased the maximum number
    - If there are any, manually **Edit the booking details** and change the booking status to **On waiting list**
    - Send the **Confirmation – Waiting list place** email to the participant editing it to explain that they have a waiting list place and not a confirmed place
21. In the **Bookings tab** of the event identify the original booking which was made using the wrong CRSid and **Delete** it
22. If necessary, go in to the person details page of the original booker and change the name of the person back to the correct name, if it had been changed.

- Information on how to promote people on the waiting list is covered later in this manual

Copyright © 2010 University of Cambridge

8 Programmes

- See the **Training Manager Notes** document for details of how to create programmes
- **Programmes** contain events which are grouped together across a period of time e.g. Researcher Development Programme 2016 – 2017
- A programme is specific to a particular provider
- The programme in which an event is listed will need to be selected to carry out certain functions

Copyright © 2010 University of Cambridge

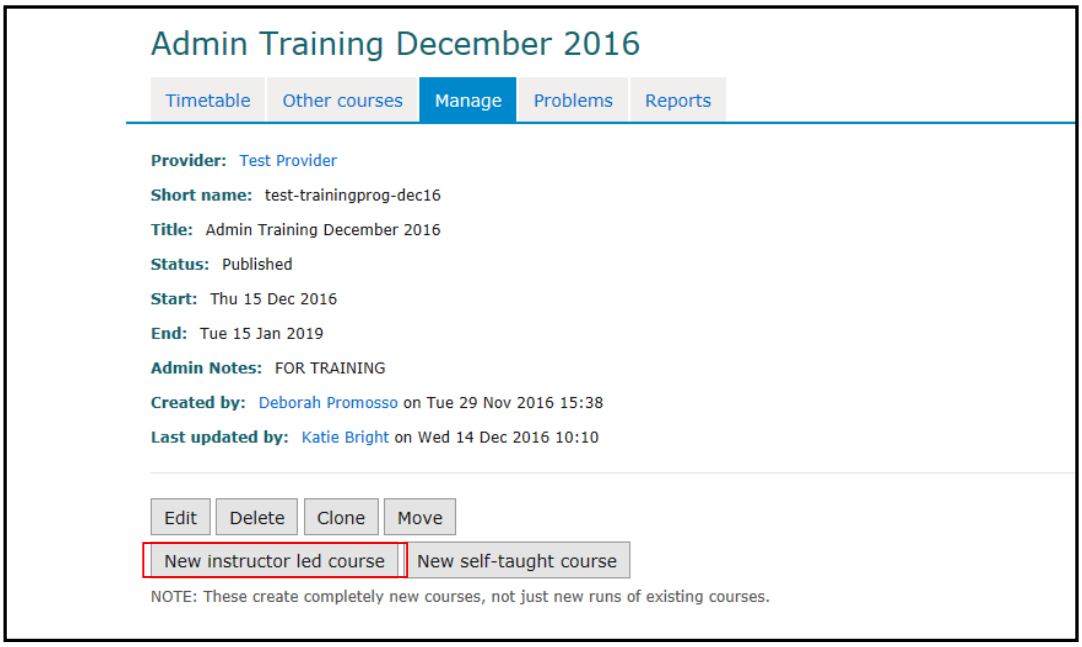
9 Events

- These are specific occurrences of a particular course and will usually have a session set up for the date on which the event occurs (with the exception of self-taught/online courses)
- If the event occurs across a number of days it will have more than one session e.g. Navigator will have four sessions set up – one for each day
- E.g. Time Management is a course and it is going to run on 1st October. An event will be created and then a session created for this date.

9.1 Create a new event

- First: Log in to UTBS and select your **Provider** from the toggle

1. Select the **Programmes** option from the Admin list on the top right hand side
2. Click on the **programme** you wish to use, eg. Admin Training December 2016
3. Click on the **new instructor led course** button

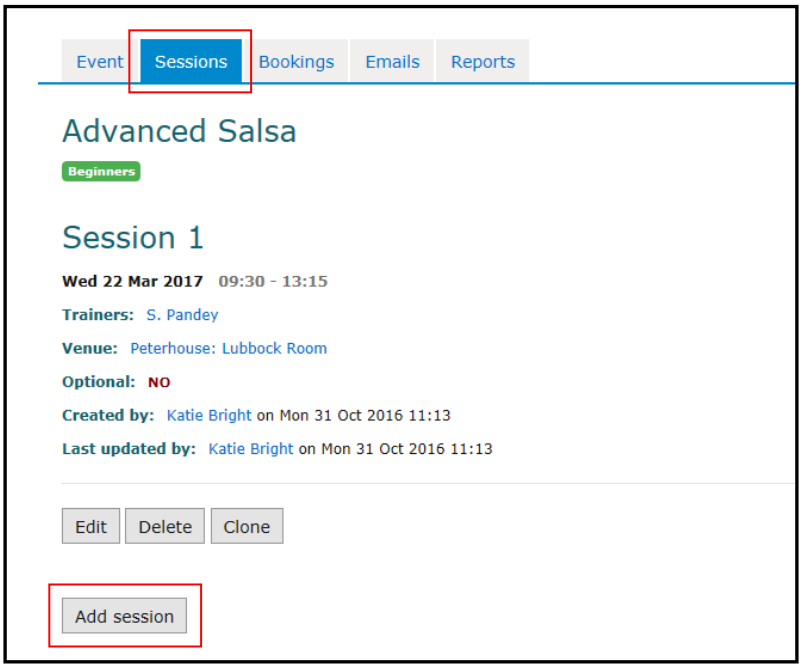


4. Leave the **Programme** as the one you want to add it to e.g. Admin Training December 2016
5. Complete the following details: paste in the **Course id** (e.g. ppd-srd) and **Title** (e.g. Lecturing and Performance), select **Course Type** (e.g. Instructor Led - Taught Course), select **Status** (e.g. published)
6. Make sure the **Show on timetable, Show on themes page, Show on search page** and **Allows bookings** boxes are ticked or not ticked, as necessary
7. Complete the **minimum** and **maximum** number and **standby** number (if using)
8. Tick the **Special eligibility** box, if required

9. Tick the **Assessed** box if participants will be assessed
10. Tick the **Copy to next programme box** (unless the event will not run in the next programme)
11. Type in the CRSid of the **Administrator, Owner and Booker.** Note: not all these fields may be applicable to your provider
12. Copy and paste in the event **Description** and format using wiki mark up (use the Help and Preview buttons as necessary)
13. Add the **Target audience** and complete the rest of the course details, as required
14. Tick any required **Course flags** (e.g. beginners, prerequisites etc.)
15. Add **Payment information** as required
16. Add **Administrative information** as required
17. Paste in any **Joining instructions** (these will be copied in to the booking confirmation email for this event only and are in addition to the standard email template text)
18. Create any **Extra Admin info** sections as required (e.g. to use as a work list, such as Handouts prepared and sent to venue: Date)
19. Click **Save**. The event has now been created and you can create the sessions

9.2 Create session(s) for an event

1. Click on the **Sessions** tab
2. Click **Add session**



3. Select time and date from **date/time picker** (remember to set start and end times on the same date, if appropriate)
4. Click on **New trainer**
5. Type in **CRSid** if internal/last name if external
6. Click on the correct **trainer name**
7. Select a **venue** from the drop down box and click **Save**
8. Add any **Optional administrative information**, e.g. **Venue notes** and **resource notes** and click **Save**

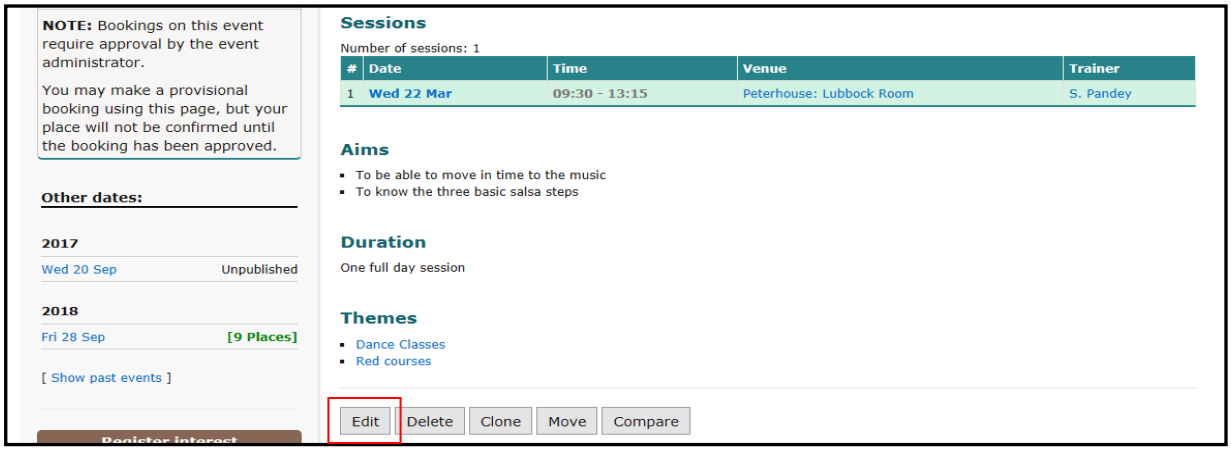
- Repeat steps 1 – 8 for all sessions required e.g. For the Navigator programme each event has 4 days therefore 4 sessions. You have now created an event with sessions

Note: *You can use the clone button to clone a session instead of creating new sessions. You will then need to change the dates/tutor as appropriate. Ensure that you double check that the cloned details are correct.*

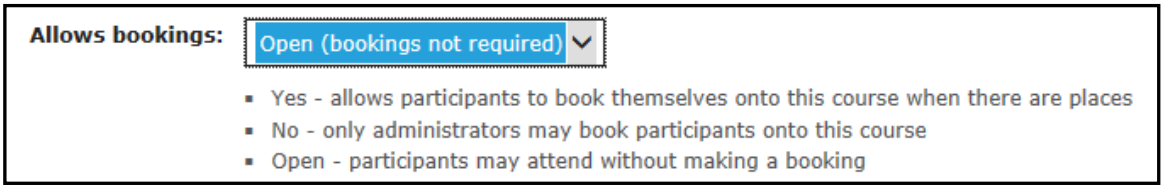
Best Practice: *You must remember to add all relevant courses to a theme (or they won't show when people search* ***themes****)*

9.3 Events which do not require bookings

- This can be used for events which you wish to advertise but do not wish to take bookings for
- Click on the **Event** page and select **Edit**



- Go to the **Allows bookings** drop down list and select **Open (bookings not required)**

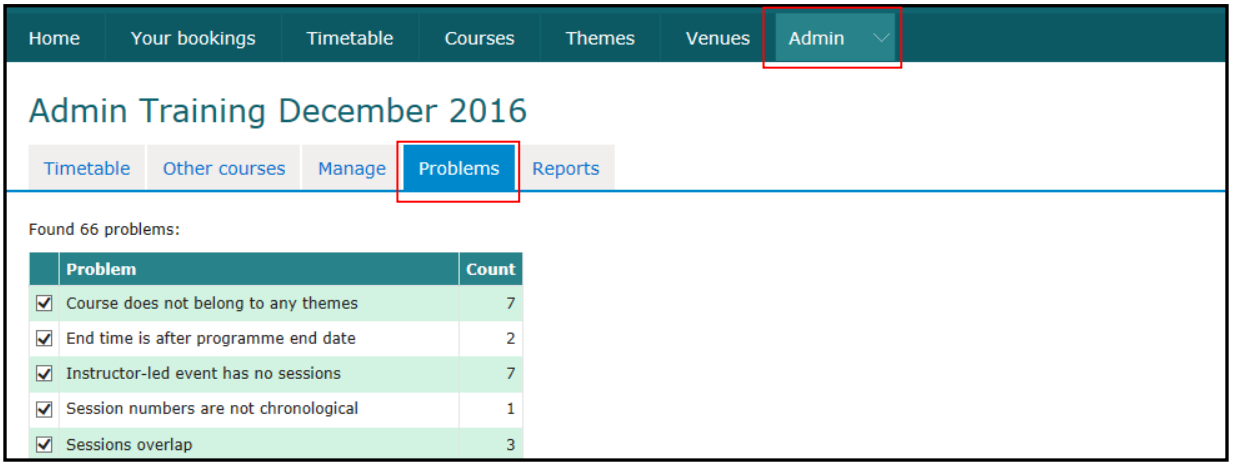


- The message '**Bookings are not required for this event'** will display on the event page.

9.4 Event clashes

- Tutor and venue clashes will be highlighted on the system

1. To check for any clashes e.g. tutor/ venue go to **Admin** and identify the correct programme
2. Select the **Problems** tab
3. Take any action required to resolve the problems, as appropriate

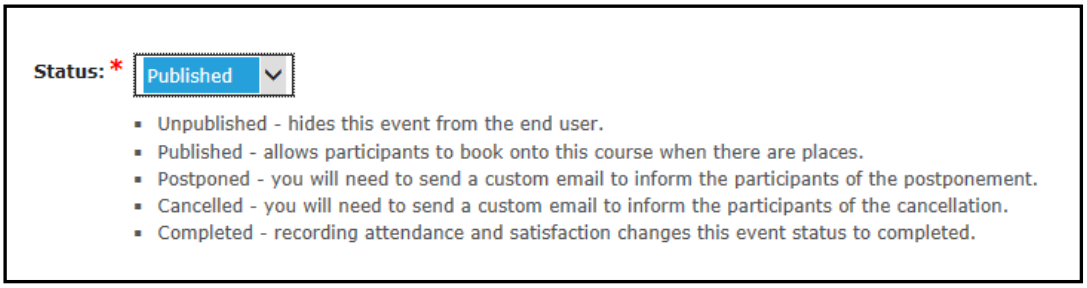


9.5 Cloning and editing an event

Best Practice: *Once a course has been added to the system for the first time, if you wish to create further instances of that course, you must clone an event of that course. This will ensure all events of that course are linked by the course ID. They can therefore be displayed and reported on correctly.*

1. Search for the course you wish to clone using the **search box** (top right)
2. Click on the **title** of the event you wish to clone
3. Click on **Clone** button

4. Set the date you wish new event to start from and click **Clone.** The **event cloned** page will now appear.
5. Go to the **Sessions** tab to make sure the dates, times, venues, tutors of the cloned sessions are what you require and amend as necessary using the **Edit** button
6. Once you are happy with all the details of your event and associated sessions you must remember to go back in to the **Event tab** and use the **Edit** button to change the **status** of the cloned event to **Published.** You have now created a cloned event

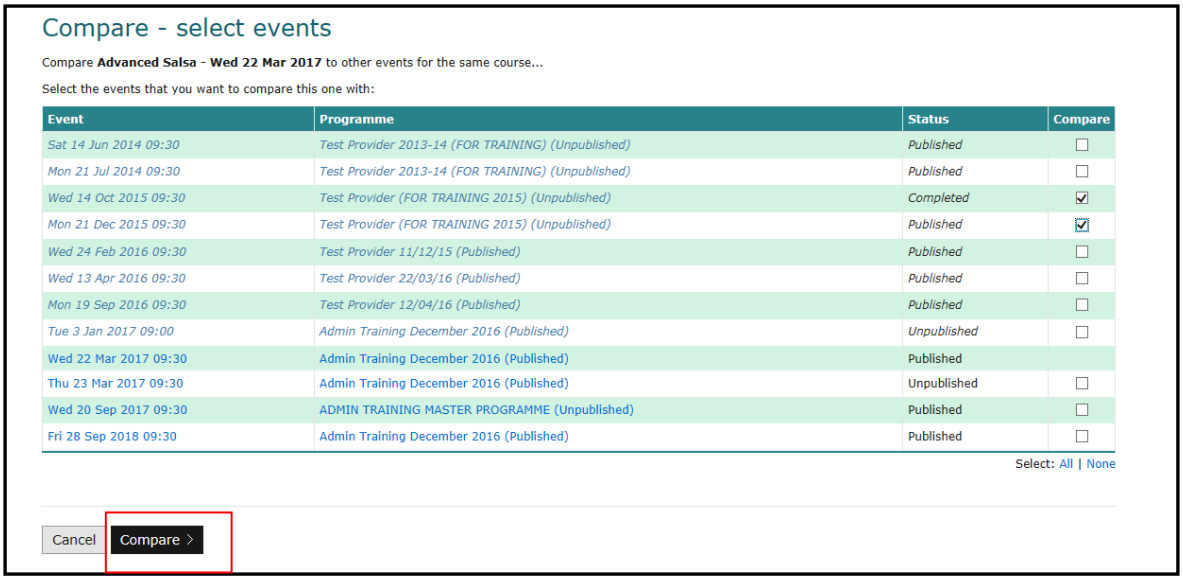


- Go to the **Timetable** or **Programme** page to check the event is listed
- Go to the **Courses by theme** page and select the theme the original event was listed in, the date of the new event date should now appear next to the course title

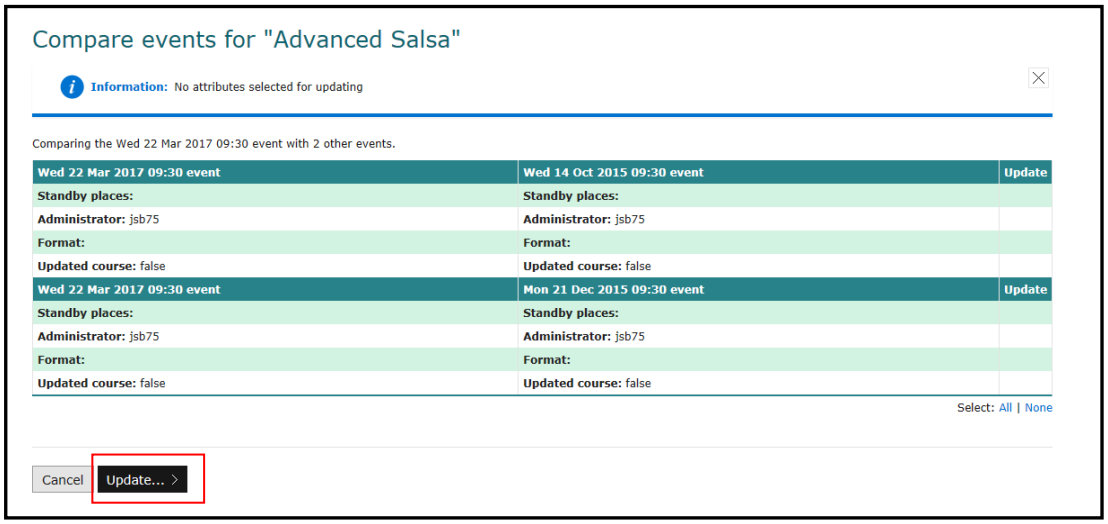
9.6 Comparing and updating events/sessions (to make amendments)

1. Navigate to an event you wish to use as the 'master' event. Click on **Compare**

2. Tick the box(es) for the events you wish to compare with the 'master' event
3. Click **Compare**



4. **Select the attributes** that you want to compare e.g. Event Title, Target audience and Aims
5. Click **Compare**
6. The 'master' event will appear on the left, with any differences highlighted in red
7. **Tick** the box in the **Update column** for any attributes that you wish to update to be the same as the 'master' event

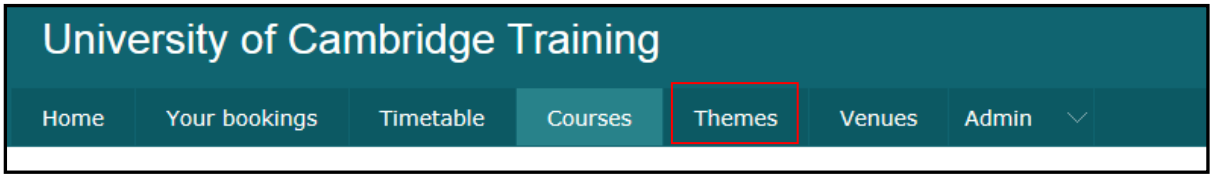


8. Click **Update**. You will be shown a page with the details of the attributes you are about to change and asked to confirm
9. Click **Update** to proceed

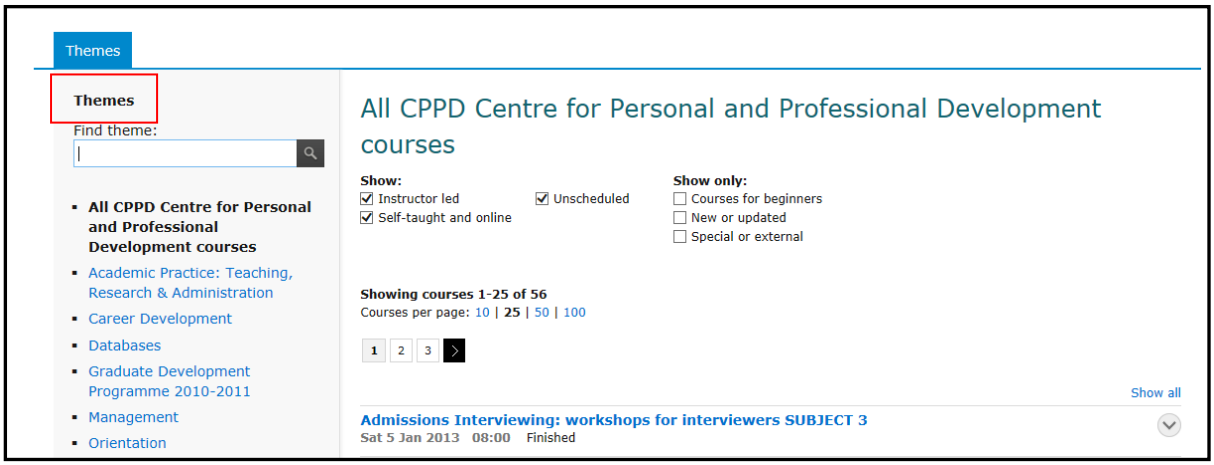
Note: *You can compare* ***Session*** *information, as above, but you cannot use the auto update process, changes will need to be made* **manually**

9.7 Add an event to a theme

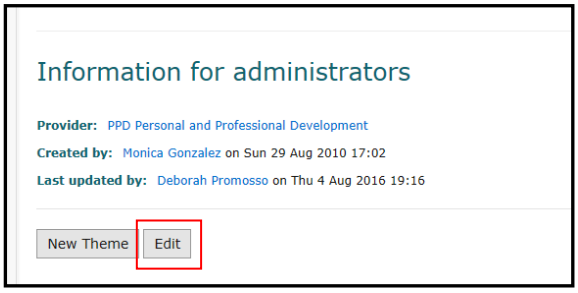
1. Go to **the Themes** tab



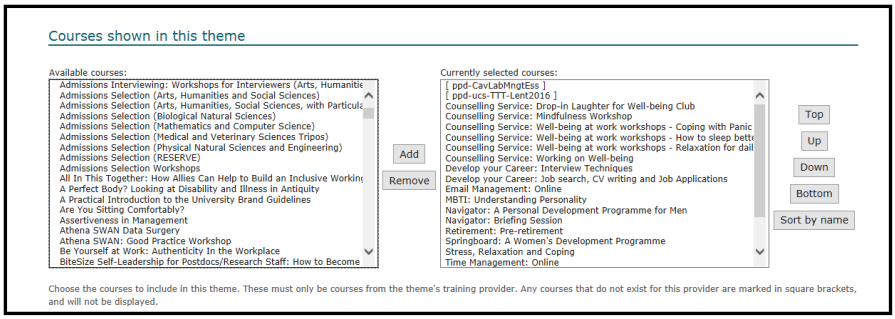
2. Select the theme you wish to add the course to from the list on the left



3. Click the **Edit button at the bottom of the screen**



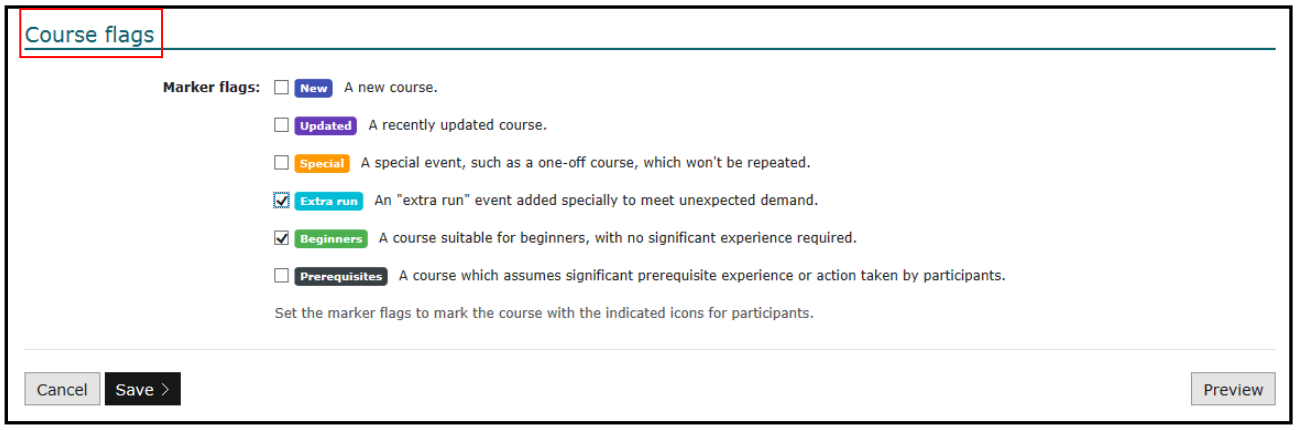
4. Highlight your newly created course and click **Add**
5. Click **Save. Theme updated** page appears with the course you have added now showing in the listing for that theme



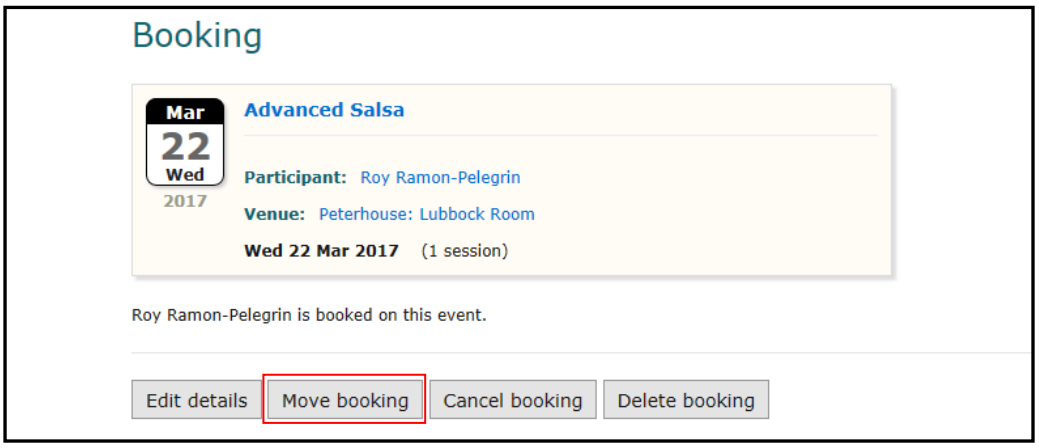
Note: *Courses in themes should be listed in alphabetical order. You may need to use the* ***Sort by name button*** *for this*

9.8 Add an extra event to meet demand

1. **Clone** the existing event as per the procedure above
2. Go to **Course Flags** and select the flag **Extra Run**



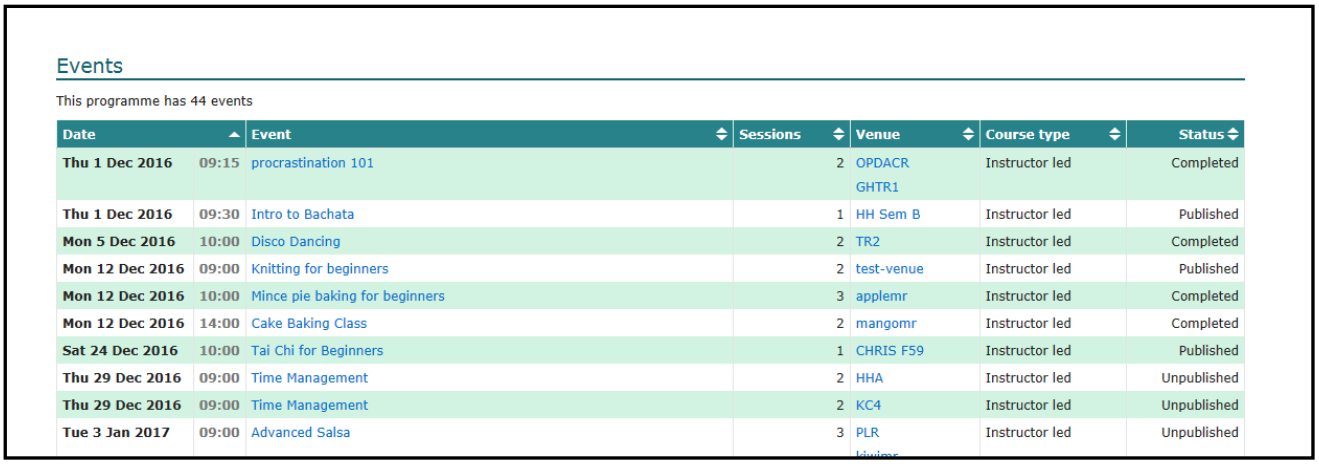
3. In the General information section de-select the **Show on timetable**, **themes** and **search** page
4. Click **Save**
5. Contact the waiting/interested list (see Emails for events section) to offer them the new date, give them 1 week to reply
6. **Move the bookings** of those people who respond to the offer of the new date on to this new date
7. You will need to go in to each person's booking page for the original event and select 'move booking' to do this



- If there are still places available on this extra event once the deadline has passed for waiting/interested list people to reply **Edit** the event and tick the boxes to say **Allows bookings**, **Show on timetable**, **themes** and **search** page. Users will now be able to make bookings on to this event as per a standard event

9.9 Cancelling an event

1. Select the **Programmes** option from the **Admin list**
2. Click on the **Programme** the event is in
3. Click on the **course title** of the event you wish to cancel

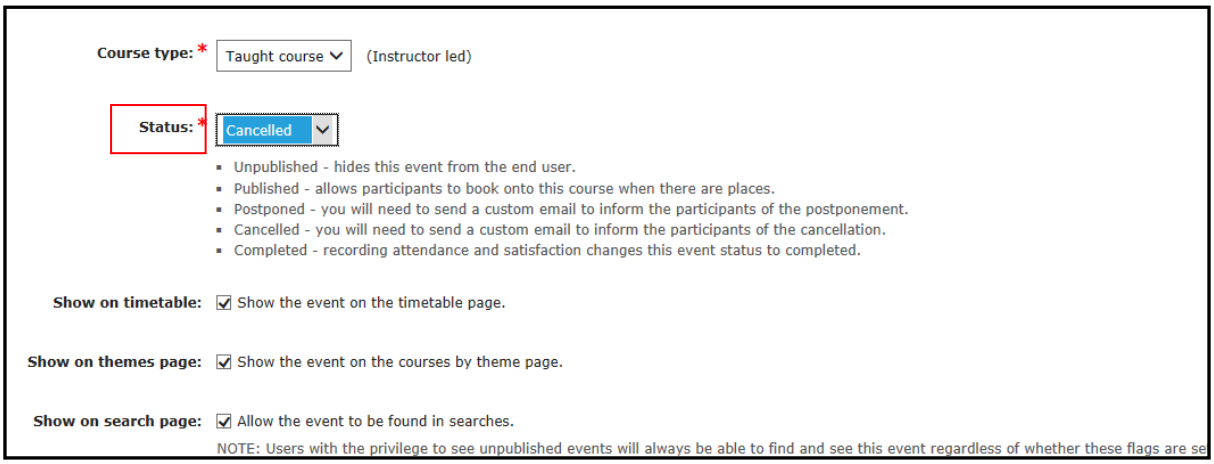


Events

This programme has 44 events

Date		Event	Sessions	Venue	Course type	Status
Thu 1 Dec 2016	09:15	procrastination 101	2	OPDACR GHTR1	Instructor led	Completed
Thu 1 Dec 2016	09:30	Intro to Bachata	1	HH Sem B	Instructor led	Published
Mon 5 Dec 2016	10:00	Disco Dancing	2	TR2	Instructor led	Completed
Mon 12 Dec 2016	09:00	Knitting for beginners	2	test-venue	Instructor led	Published
Mon 12 Dec 2016	10:00	Mince pie baking for beginners	3	applemr	Instructor led	Completed
Mon 12 Dec 2016	14:00	Cake Baking Class	2	mangomr	Instructor led	Completed
Sat 24 Dec 2016	10:00	Tai Chi for Beginners	1	CHRIS F59	Instructor led	Published
Thu 29 Dec 2016	09:00	Time Management	2	HHA	Instructor led	Unpublished
Thu 29 Dec 2016	09:00	Time Management	2	KC4	Instructor led	Unpublished
Tue 3 Jan 2017	09:00	Advanced Salsa	3	PLR	Instructor led	Unpublished

4. Click on the **Edit** button
5. Change the event status to **Cancelled** in the drop down list



Course type: * Taught course (Instructor led)

Status: * Cancelled

- Unpublished - hides this event from the end user.
- Published - allows participants to book onto this course when there are places.
- Postponed - you will need to send a custom email to inform the participants of the postponement.
- Cancelled - you will need to send a custom email to inform the participants of the cancellation.
- Completed - recording attendance and satisfaction changes this event status to completed.

Show on timetable: ☑ Show the event on the timetable page.

Show on themes page: ☑ Show the event on the courses by theme page.

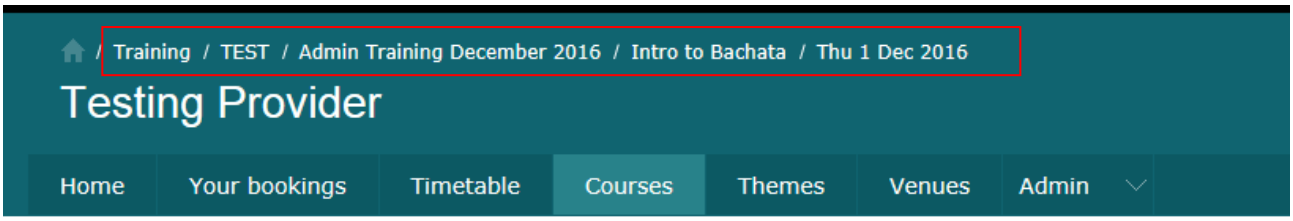
Show on search page: ☑ Allow the event to be found in searches.

NOTE: Users with the privilege to see unpublished events will always be able to find and see this event regardless of whether these flags are se

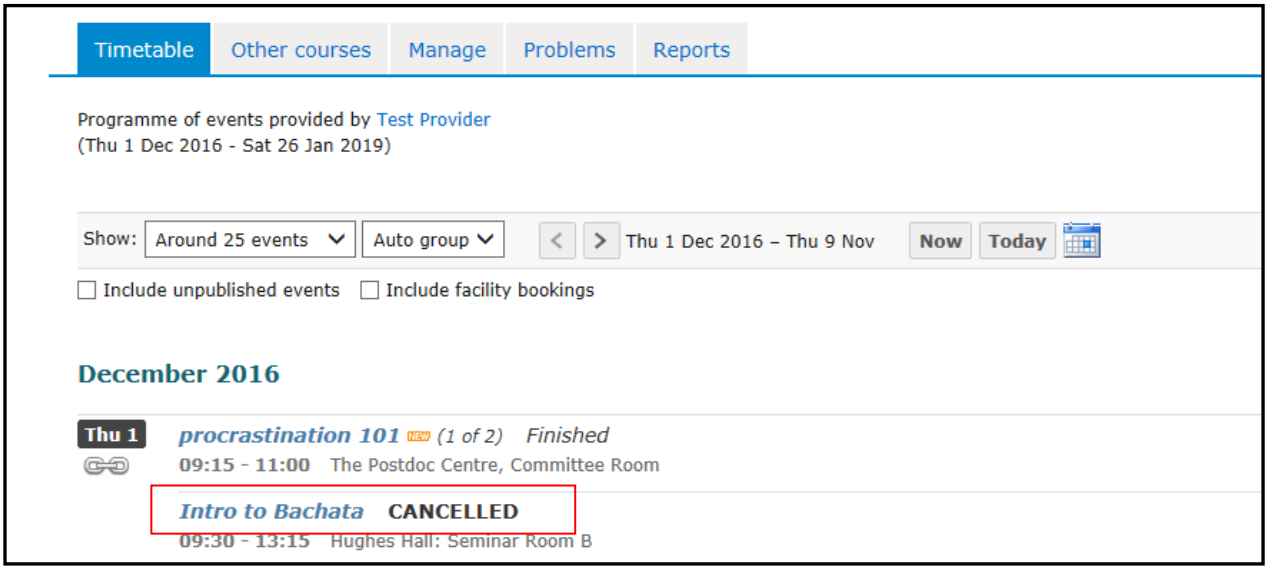
6. In the **Admin Notes** for the event write in your initials, the date and the course cancellation reason e.g. KB 09/02/17 Course cancelled due to low numbers

Copyright © 2010 University of Cambridge

7. Click **Save**
8. Check back in to the programme which the event was part of (you can use the breadcrumb trail at the top of the page to do this quickly)



→ The event now has **CANCELLED** written next to it



9. The **Course cancelled email** must be sent to all participants, the venue and the tutor (plus the caterer if appropriate). See the section on Emails for more details on how to send emails through the system.

Best Practice: *This process must be done in the correct way so that it can be reported on. You must not delete an event unless it was added as an administrative error.*

9.10 Add and edit a new venue

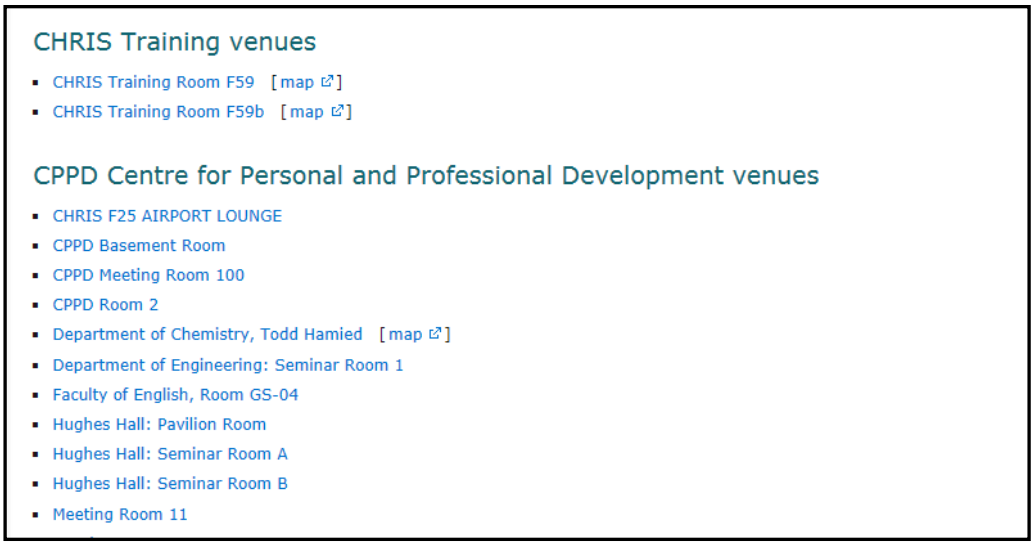
- Venues which are not owned by a Provider (i.e. none of the UTBS Providers take bookings for the venue) are listed under the Provider 'University of Cambridge (UOC)'
- Please contact *ppd@admin.cam.ac.uk* (UAS Providers) or *monica.gonzalez@uis.cam.ac.uk* (non-UAS Providers) with the following details for any new venues you wish to be added to the system, or any updates to existing venues
  - **Venue is Provider owned – yes or no**
  - **Name**

- **Location**
- **Map URL**
- **Directions**
- **Parking Advice**
- **Disabled Access**
- **Contact Details**
- **No. of Work Stations**
- **Max Capacity**

To view all Venues which are already listed on UTBS:

1. Change the Provider toggle to **All Providers**
2. Click on **Venues**
3. Use the **Find** function on your machine to search for a particular venue (e.g. CTRL + F)

- When **selecting** a venue for a **session**, if it is not owned by a particular provider, you will need to look towards the end of the list for the UOC venues:



10 Emails for events

All emails which relate to an event can now be sent through UTBS

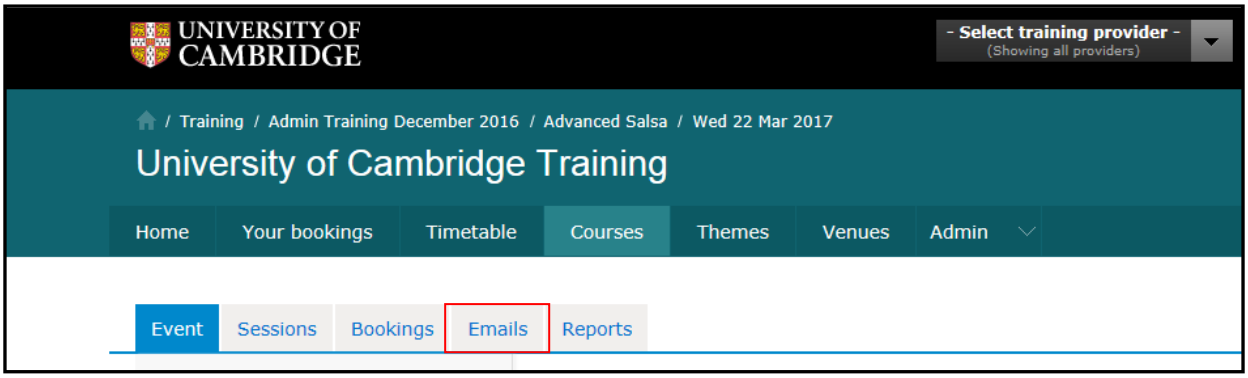
- Custom emails and template emails can be sent through the system
- The system will keep a record of all emails sent for a particular event or person
- This function is useful if you are covering for someone and want to check what emails have been sent
- You can also use the system to send emails to people who are **not** participants, or tutors
- The email templates available are:

Booking emails;
Confirmation – Booking
Confirmation - Booking cancelled
Confirmation - Registered interest
Confirmation - Standby place
Confirmation - Waiting list place
Offer available place
Promote to standby from waiting list
Event emails;
Advertise new date to those interested
Advertise new date to those on waiting list
Booking payment received
Booking payment reminder
Course cancelled
Course evaluation reminder
Course evaluation request
Course high bookings
Course high cancellations
Course high non-attendance
Course non-attendance
Course non-booker
Course payment reminder
Course postponed
Course rescheduled
Course setup confirmation request
Course trainer confirmation request
Course venue confirmation request
Custom email
Event reminder
Event reminder (1 – 5)
Facility booking details
Facility booking information
Instructor-led bespoke details
Instructor-led bespoke payment received
Instructor-led bespoke payment reminder
Request confirmation - low bookings
Self-taught bespoke payment received
Self-taught details

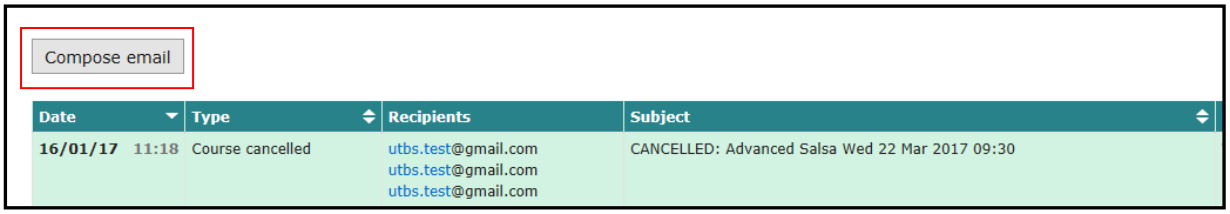
Copyright © 2010 University of Cambridge

10.1 Manually sending an email for an event

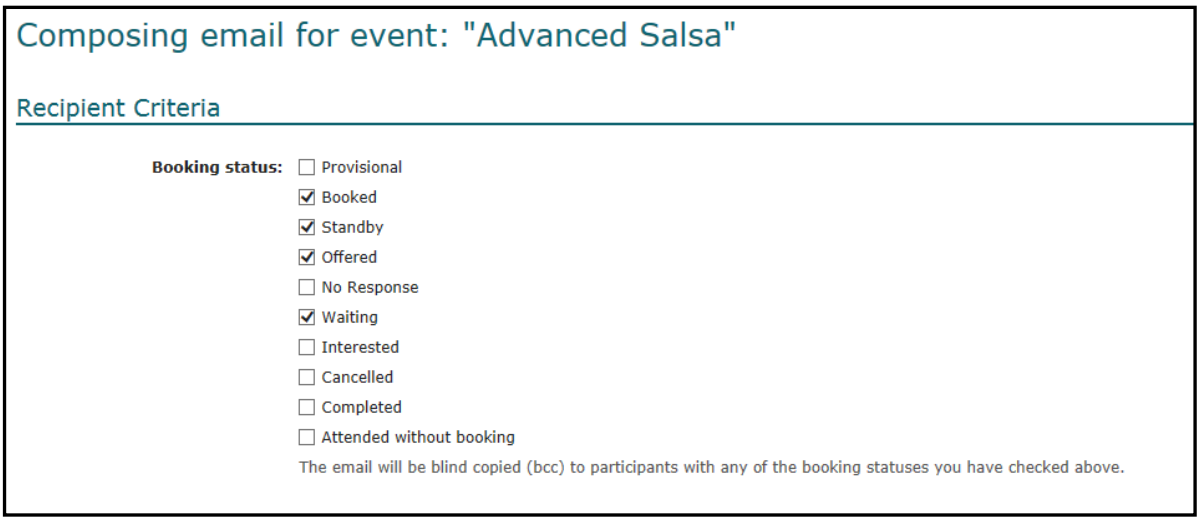
1. Go to an event and select the **Emails tab**



2. Click on **Compose email**



3. Select the **email type** you wish to send from the drop down list
4. Select the **status(s) of bookings** that you want the email to go to (you can send to all or filter out to send to only those on the waiting list etc.)



5. If the trainer needs to be copied in tick the **Send a blind copy (bcc) to the course trainer(s)** box
6. Filter by Attended, Charging rate, and Paid, as required (you do not need to do anything if you don't wish to filter by any of these categories)
7. Check the list of recipients is correct
8. Click **Next**
9. Read the text and edit it if necessary

Recipients: J.C. Monck <utbs.test@gmail.com>
› Preview

Subject: Trainer confirmation: Advanced Salsa Wed 22 Mar 2017 09:30

Body text:

```
** This is a template that needs to be filled in before sending **

Dear TBD,

I am writing with further details for the following Test Provider course that you are delivering:

  Advanced Salsa
    http://utbs-training.csx.cam.ac.uk/event/64416

  Session(s):
    Wed 22 Mar 2017  09:30-13:15  Peterhouse: Lubbock Room

Presentation material:
----------------------
Please bring any presentation material you require with you on a removable
memory device (e.g. cd or memory stick).
```

10. Click **Send**

→ Email sent page appears

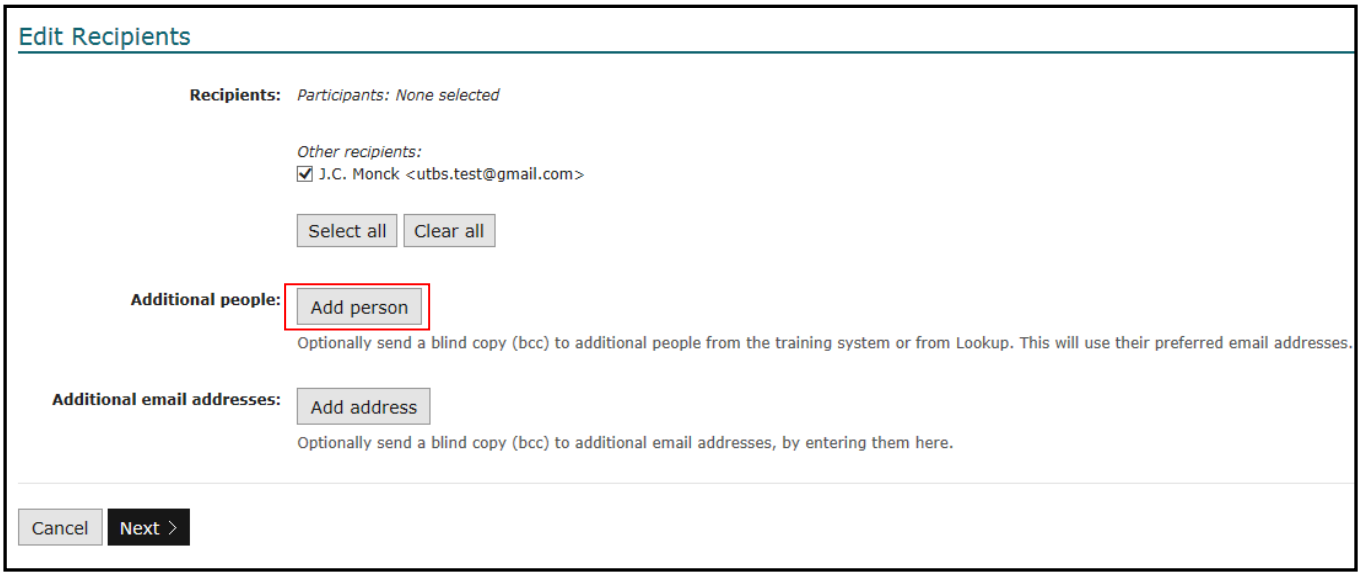
→ You can view the text of the email you sent by clicking on **View** in the Body column of the emails table under the **Emails** tab

Type	Recipients	Subject	Email
Course trainer confirmation request	utbs.test@gmail.com	Trainer confirmation: Advanced Salsa Wed 22 Mar 2017 09:30	View email ›
Course cancelled	utbs.test@gmail.com utbs.test@gmail.com utbs.test@gmail.com	CANCELLED: Advanced Salsa Wed 22 Mar 2017 09:30	View email ›
Course cancelled	utbs.test@gmail.com utbs.test@gmail.com utbs.test@gmail.com	CANCELLED: Advanced Salsa Wed 22 Mar 2017 09:30	View email ›

Copyright © 2010 University of Cambridge

10.2 Manually sending an email to someone who is not a participant or tutor (e.g. a catering confirmation)

1. Go to the event and select the **Emails tab**
2. Select **Compose email** and then choose **Custom email** from the drop down list (or a template email, as required)
3. **Deselect all the booking status boxes** and the **Send a blind copy** (bcc) to the course trainer(s) box
4. Click **Next**
5. Click **Add person** to add an internal person's email address or **Add address** to add an external email address



6. Click **Next**
7. Complete the email subject box and write your email or review the email text if it is a template email
8. Click **Send.** Email sent page appears

10.3 Sending manual booking emails

- UTBS by default sends out booking emails to participants to notify them of their booking status as it changes, however there are certain instances where administrators will be required to manually change the booking status of participants
- In these instances manual booking status confirmation emails can be sent. Some example situations are:

- when automatic emails are disabled for the event and bookings are being manually administered
- when making 3rd party interested bookings when you are waiting until a later date to decide who will be allocated places (see Special eligibility events where attendance requires approval (booking status =)
- when swapping an existing booking for a new booking e.g. someone has made a booking for a member of the University using their own CRSid rather than CRSid of the ember of the University

10.4 Joining Instructions

- These will now be sent in the automated booking / waiting list/ standby /interested place confirmation email that is sent once a person makes a booking

Best practice*: Any special joining instructions for an event, which are different to the template confirmation email, must be added in to the Joining Instruction field in the event* ***Administrative Information section*** *(e.g. please read the online material at X web page before the course, please bring two copies of your CV etc.). See the section on* ***Creating an Event*** *for further details of how to do this.*

10.5 Reminder email

- These will be sent **automatically** for the **first session** of each event. They are set to go out at **5 days** and **1 day before** the event to everyone who has a status of booked/ standby/ place offered.

Best practice: *If an event has more than one session and you wish to send out a reminder before each of the sessions, after session one this must be done manually using the emails tab (see instructions above for details). A note should be made in the* ***Admin notes*** *for each event for which this is required.*

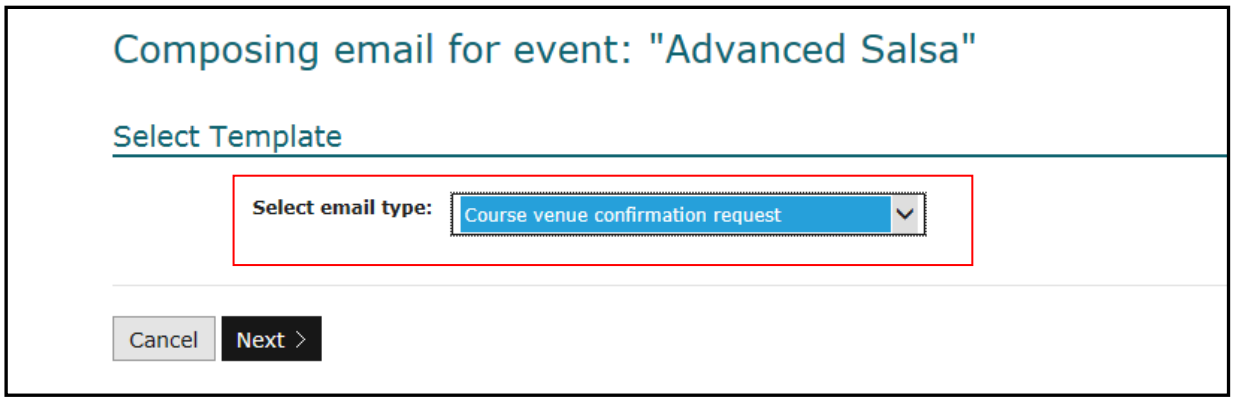
10.6 Offer a cancelled place to the waiting list

- If a participant cancels their place the system will **automatically** send out an email to the first person on the wait list to offer them this place
- If they reply within the set time (1 working day) then they can accept the place (they click on the **Accept place** button in their booking, which is linked to in the email they receive) or reject it
- If they do not reply the place will be offered to the next person on the waiting list and the first person who was offered a place will have their status automatically changed to **No Response**

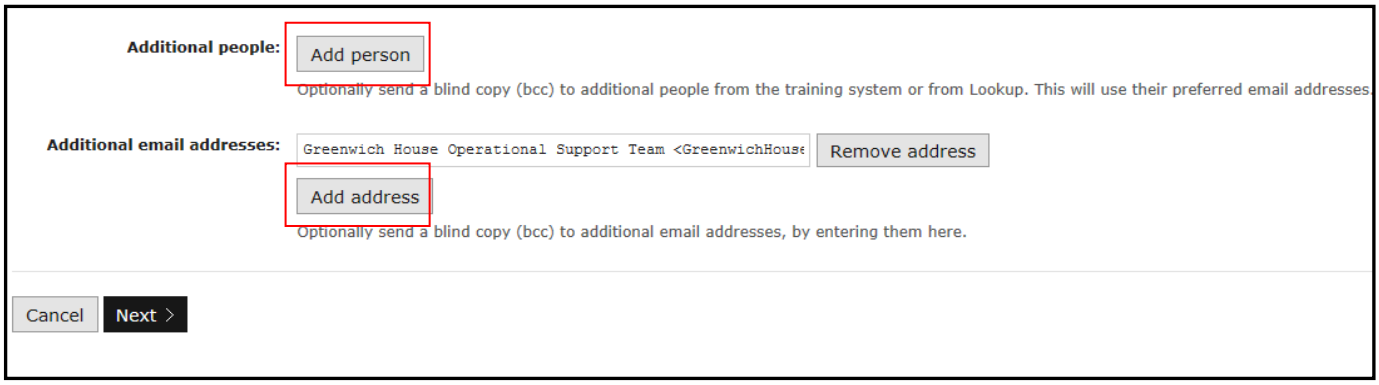
Copyright © 2010 University of Cambridge

10.7 Sending a Venue Confirmation email

1. Go to an event and select the **emails tab**
2. Click **Compose email**
3. Select **Course venue confirmation request** from the drop down list



4. Click **Next** and **Next** again
5. Add in the venue contact email address (use **Add person** if internal and **Add address** if external)

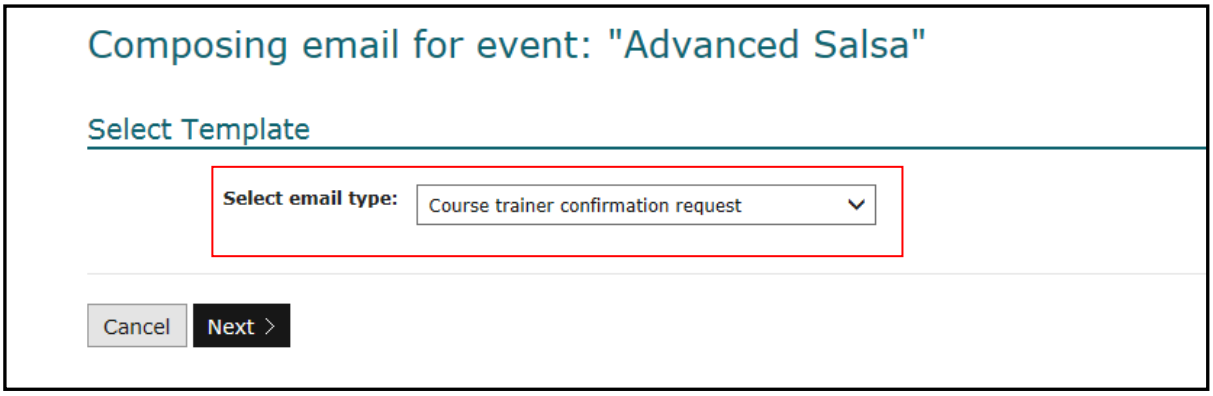


6. Click **Next** and preview your email
7. **Edit** the email if necessary - check that all venue details are correct, e.g. catering times/requirements, room layout, equipment etc. These are pulled through from the **resource and venue notes** in the **sessions** for the event
8. If the event takes place in different venues, ensure you only send the relevant details to each venue (i.e. delete any information which is for a session at a different venue)
9. Delete the text **'This is a template that needs to be filled in before sending'**
10. Click **Send.** Email sent page appears

Copyright © 2010 University of Cambridge

10.8 Trainer Confirmation

1. Go to an event and select the **Emails tab**
2. Click **Compose email**
3. Select the email **Course trainer confirmation request** from the drop down list



4. Click **Next**
5. The box 'Send a blind copy (bcc) to the course trainer(s)' will have been automatically ticked
6. Check the list of recipients and click **Next**
7. Preview your email and **edit** it as necessary
8. Click **Send.** Email sent page appears

10.9 Disabling/Enabling Automatic Emails for an Event

- By default instructor-led and self-taught events have automatic emails enabled as they inform the participants of their booking status at the time of booking and any booking status changes if there is a wait list on the event. Event reminders are also sent by default, approx. two days before the event
- However there are certain situations where automatic emails should be turned off, typically when the majority of booking administration is being handled by the administrator rather than booked by the participant.
- Possible scenarios for disabling automatic emails:
    - for departmental sessions, when the department is managing the admin separately and it would be confusing for emails to be sent from the system
    - for coaching sessions or one-to-ones when emails are not required as correspondence is made outside of the system
    - for nomination based courses where booking priority is manually decided

- for ‘drop-in’ events or open attendance events where bookings are not made online in pre-event and people sign in on the day, bookings and attendances can then be recorded post event
- for Facility Bookings – by default bookings are not taken on facility bookings so no emails are sent, however un-ticking the option to Send emails should be adhered to

1. Select the provider from the **provider list**
2. **Search** for the **event**
3. Click **Edit**
4. Click on the **Automated emails quick link** (at the top of the page)
5. Under **Send emails**: **un-tick** Send automated emails automatically (individual emails can also be deselected as required)
6. Make a note in the **Admin notes** preceded with your initials and date that you have made this change e.g. MG 12/12/2010 Auto emails disabled as manually administering the event
7. Click **Save.** Emails will now **not** be sent for this event

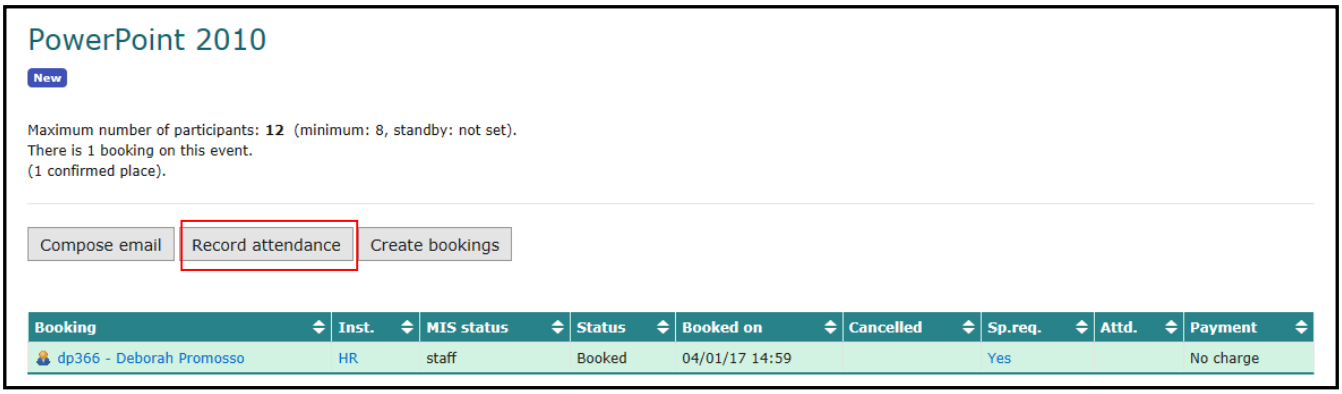
You can go in and change this at any point e.g. turn back on the automated reminder email by going in and ticking the email(s) you wish to turn back on

Copyright © 2010 University of Cambridge

11 Record attendance and assessment

11.1 Recording attendance - for single session events

1. **Search** for the event you need to update using the **search box** (on the top right)
2. **Click on the date** of the event you wish to update attendance for
3. Select the **Bookings tab**
4. Click **Record attendance**



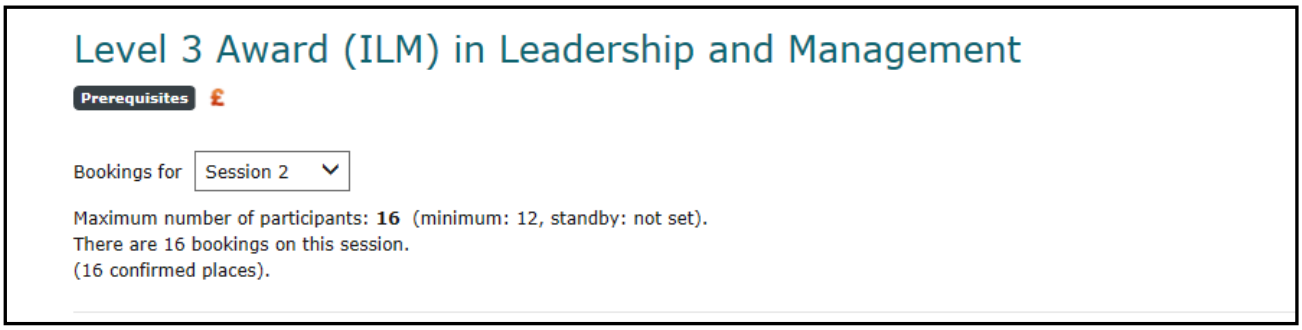
5. Click **Set all** then manually **unselect** those participants who did not attend

6. If someone was on the waiting list and did attend you should **manually** change their status to **attended**
7. Click **Save.** Attendance details updated. The event is now marked as completed page appears

To check that the attended status has been updated you can go to one of the participant's training history tab

11.2 Recording attendance - for multi session events

1. **Search** for the event you need to update using the **search box** (on the top right)
2. **Click on the date** of the event you wish to update attendance for
3. Select the **Bookings tab**
4. Change the **Bookings for** drop down menu to the session you wish to record attendance for

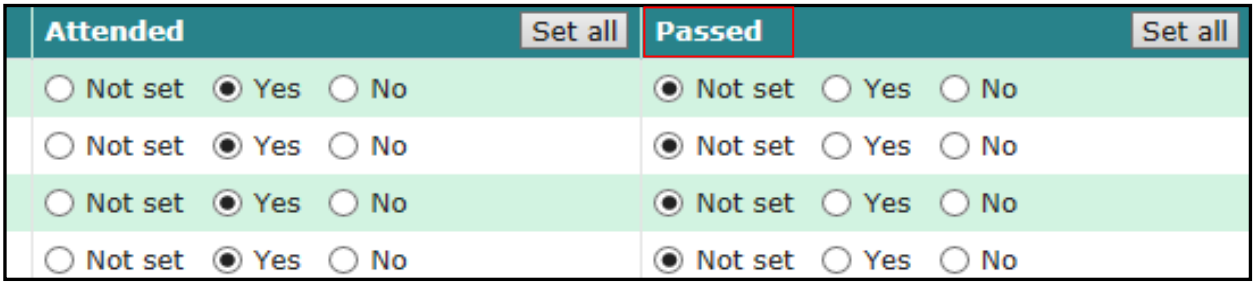


5. Click on **Record Attendance**
6. Click **Set all** - then **manually unselect** those that were booked and did not attend
7. If someone was on the waiting list and did attend you should **manually** change their status to **attended**
8. Click **Save**. Attendance details updated.
9. **Repeat points 4 – 8 for each session**

The event is now marked as completed page appears once you update the last session.

11.3 Recording Assessment

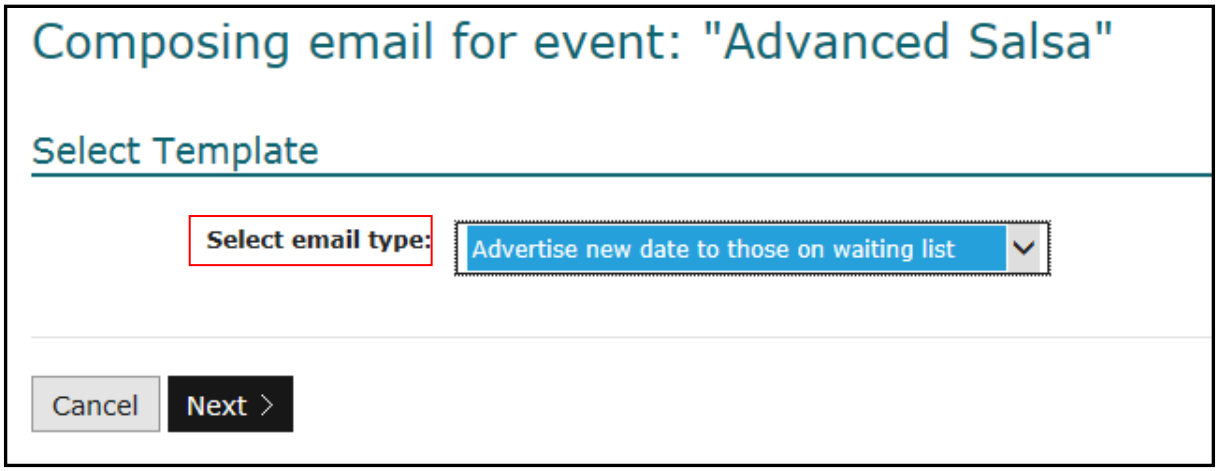
- Assessment results should be recorded in the same way as updating attendance, from the **Bookings tab** of an event, using the **Record Attendance** button:
- Assessment can be recorded per-session or for the whole event (in the same way as attendance)
- If the event is assessed, this is displayed on the **Bookings tab** of the event
- It is also displayed on the participant's training history page



12 Managing the wait list once a course has run

12.1 For courses with repeats

1. **Search** for the event using the **search box** (on the top right)
2. Click on the **date** of the event you require
3. Select the **Email tab**
4. Click on **Compose email**
5. Select the **Advertise new date to those on waiting list email** from the drop down list and click **Next**



The booking statuses selected will be **Waiting, Standby** and **Offered**

6. Set the **attended** filter as **no**
7. **Deselect** the box Send a blind copy (bcc) to the course trainer(s)
8. Click **Next** and **Next** again
9. The email text appears with details of the next available event in it
10. Check this is correct and **Send** the email

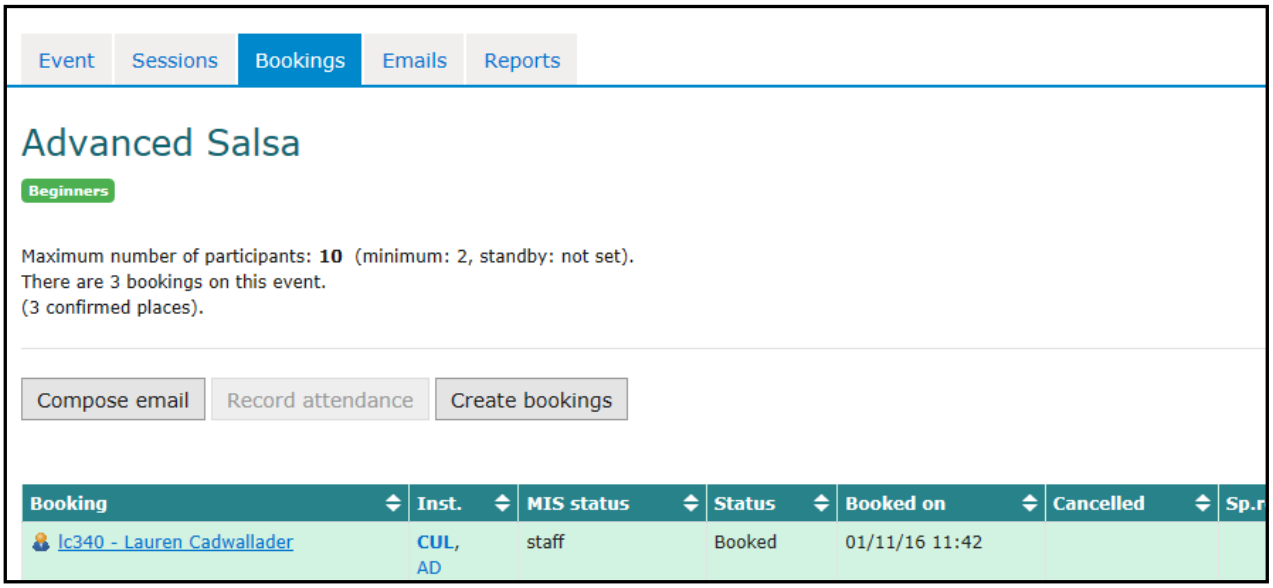
    FOR PPD

11. Give participants 1 week to reply to wait list email
12. Diary in this date to check booking statuses for all bookings on the event and set all to **No response** if have not replied
13. Edit the booking details making a note in the **Admin notes** that the status has been changed e.g. **KB 12/12/2010 Changed to No response as participant didn't respond to offer of a place on new advertised event [[event/1299 | 23rd Dec 2017]]**

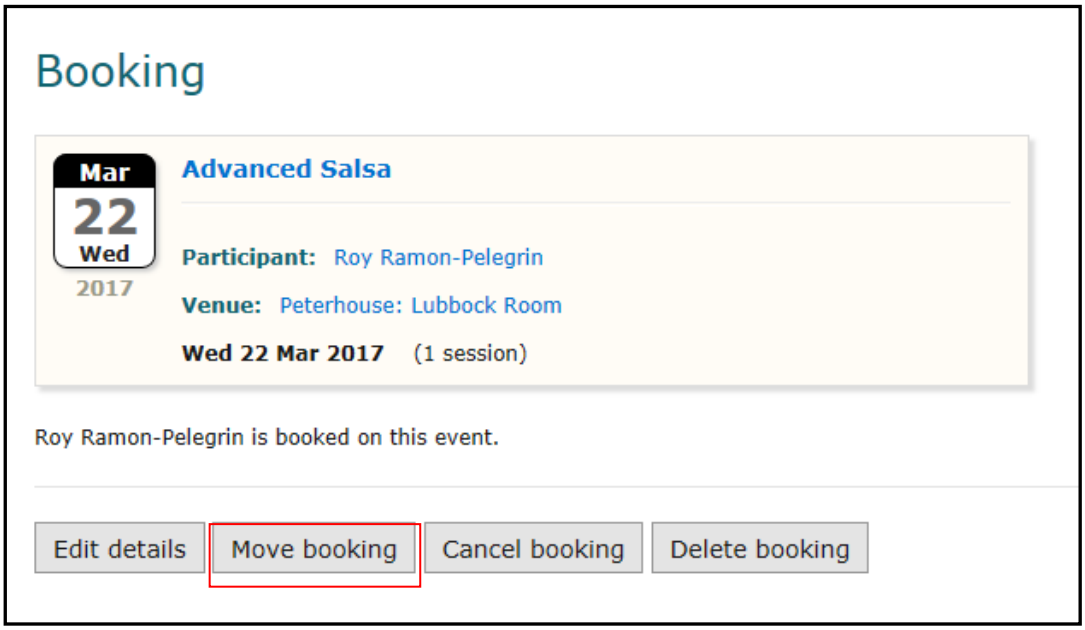
12.2 Moving a booking

- When a participant does reply to say they would like to move their booking to a future date you need to do the following:

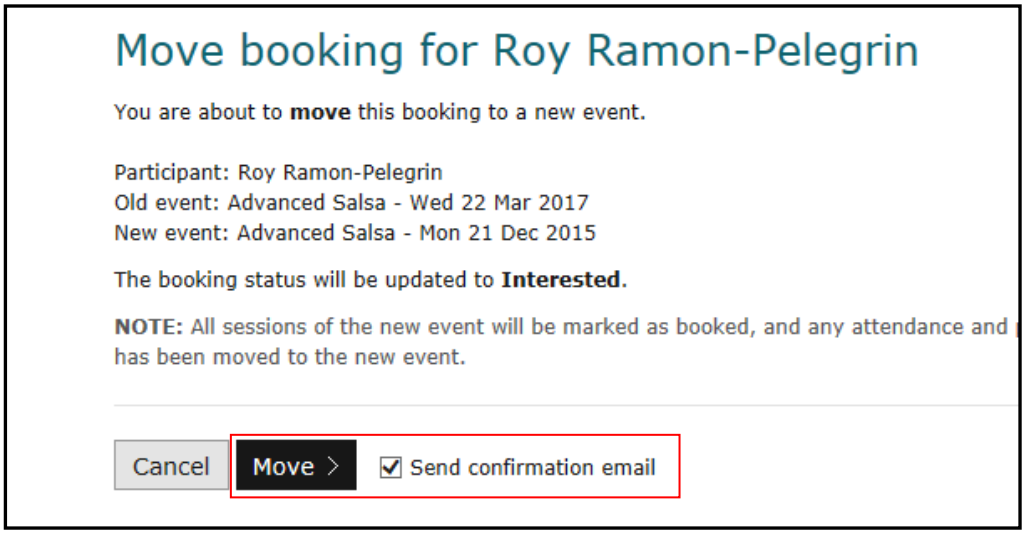
1. **Check** there are still places on the new date (if not, inform participant and offer alternative date or wait list place as appropriate)
2. Go in to their **booking** for the event (via their person page or the event page bookings tab)



3. Click the **Move Booking** button



4. Select the **new date** they wish to attend and click **Next**
5. Tick the box **Send a confirmation email to the participant** and click **Move.** Their booking has now been moved to the date they selected



6. **Edit** the **Booking details** and add a note in the **Admin notes** that the booking has been moved. Link to the event it came from e.g. MG 12/12/2016 Booking moved from [[event/12345 | 23rd Dec 2016] wait list after confirmation from participant received.

13 Reporting

- The system contains a large number of fields. These fields are all reportable, which means a lot of information can be obtained from the system
- Reporting can be used for carrying out daily admin tasks and generating statistical information.
- It is possible to report on information added in to the admin notes field for an event and it is also possible to create extra admin info sections (with customised headings). These extra sections can also all be reported on
- Example: You can add an extra admin info field called '**Evaluation'** to an event's **Admin info**. When the evaluations have all been received (electronically or hard copy) this field can be updated to say evaluations received, date, initials. This field can be included in a report so it is possible to see at a glance which events are still waiting for evaluations to be complete
- Reports are either general (so they report on all of a provider's events) or specific to a particular item e.g. a person (so only report on that item)
- The areas where reports exist and can be saved are:

  - Event
  - Person
  - Venue
  - Theme
  - Institution
  - Programme
  - Course page (use breadcrumb to get to this)
  - General reports (accessed through the **Admin list**)

- There will be reports which will be run on a regular basis by administrators e.g.:

  All Providers

  - Daily Check: Bookings Requiring Approval
  - Daily Check: Bookings Special Requirements
  - Daily Check: Bookings Eligibility Check on Events Marked Special/External Events
  - Daily Check: Event Attendance Not Yet Updated
  - Daily Check: Events in the Future with Standby or Wait List
  - Daily Check: Courses (All) with a Standby or Wait List
  - Daily Check: Events with Low Numbers
  - Event register
  - Event participant list

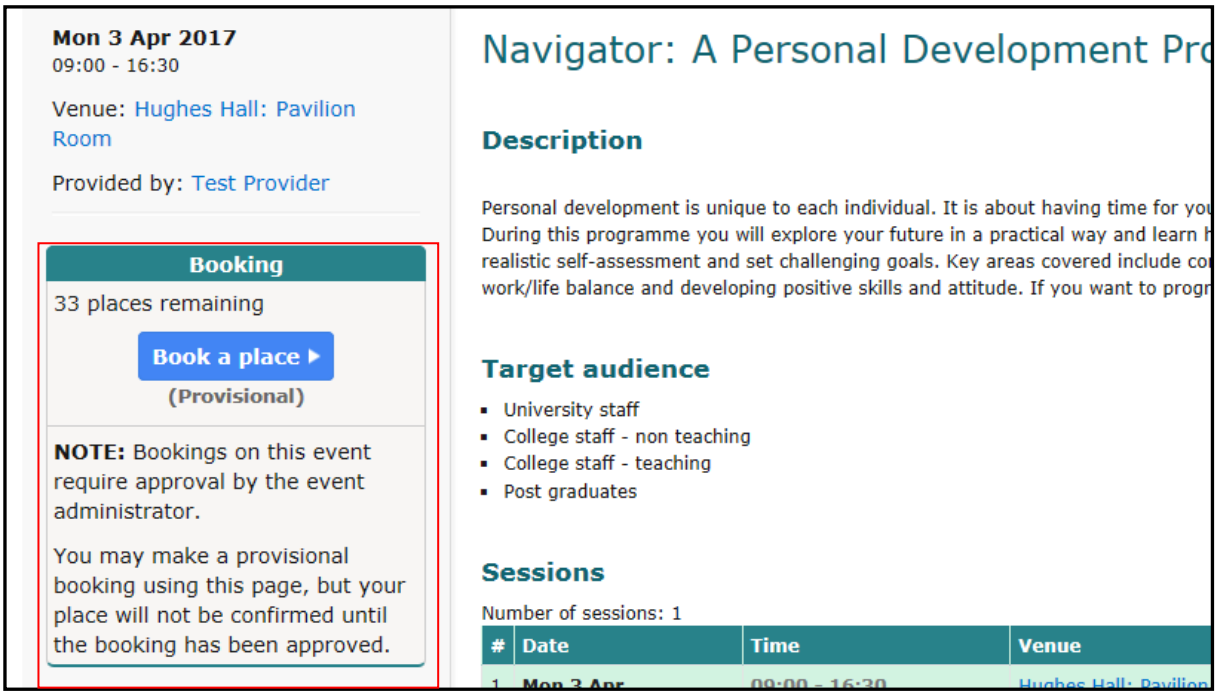
  Provider specific

  - Admin work list
  - Daily Check: Bookings Payment (Participant) Chasing
  - Eligibility check
  - Plus others as necessary

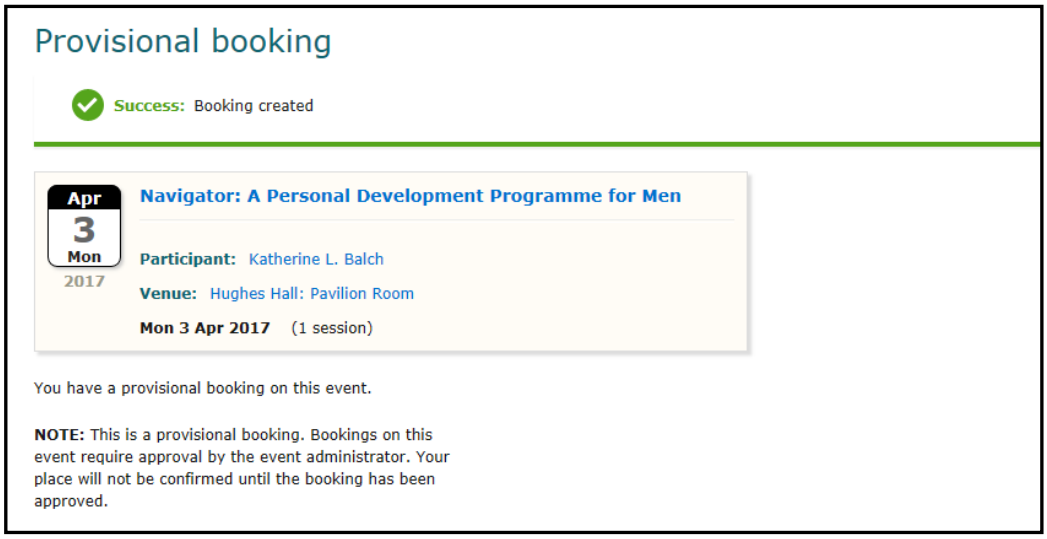
Copyright © 2010 University of Cambridge

13.1 Daily check: bookings requiring approval (for events with status = special eligibility)

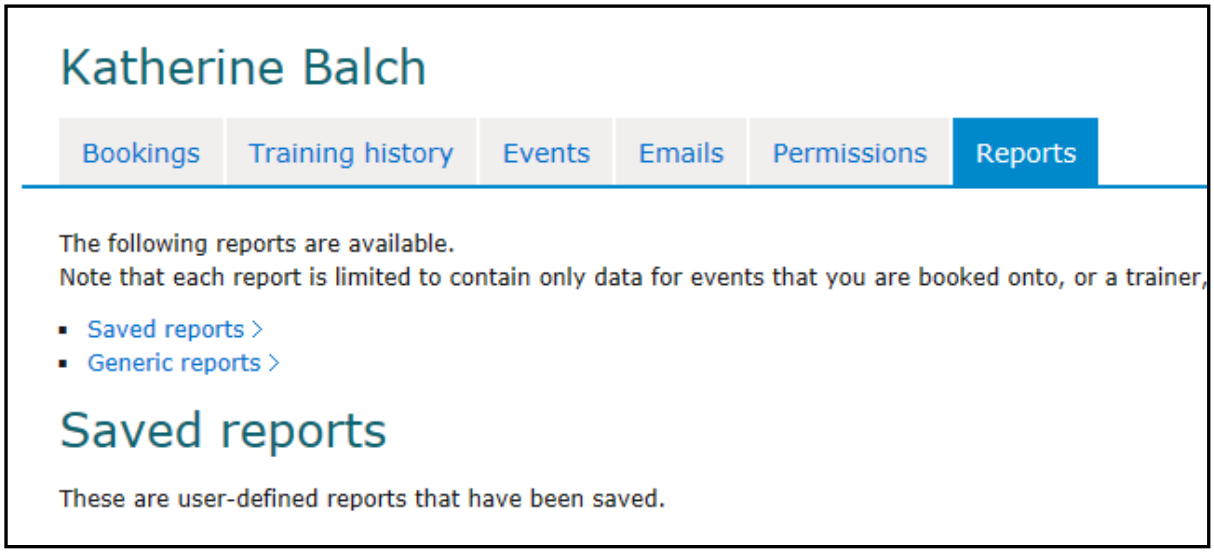
- When a participant books themselves on to a course which has been set with special eligibility (i.e. make a provisional booking) they will see the following message on the event page:



- Once a booking has been made, this is what they will see:



1. Go to the area in which the report is saved. E.g. **Your Booking** and **Reports tabs**



2. **Click on the title** of the report e.g. **UTBS - Daily Check: Bookings Requiring Approval**
3. When you are ready to approve a booking (e.g. you have checked that the participant should be allocated a place) click on the **booking time**
4. Click on **Approve booking**
5. This will generate the automatic confirmation email to be sent to the participant

13.2 Daily Check: Bookings Special Requirements

1. Go to the area in which the report is saved
2. **Click on the title** of the report e.g. **UTBS - Daily Check: Special Requirements (Participants)**

   → You will now see a summary report showing any bookings which have special requirements

Booking time	Event start	Event title	Has special requirements	Special requirements	Dietary requirements
20-Dec-2016 10:20	24-Jan-2017	Level 3 Award (ILM) in Leadership and Management	Yes	Dietary requirements - Gluten-free, vegetarian	Gluten-free, vegetarian

3. If a booking appears with no text or none/nil etc. click on the **booking time** and **Edit details** and update the Special Requirement field to delete the space or the 'nil/none' text
4. Take action as required and note this in the **Admin Notes** box for the person's booking (preceded with your initials and date)

5. Click **Update booking**
6. Special requirements should be entered into the **Person page, Special Requirements** field in order that it appears as default for any future bookings:
7. **Copy** the Special Requirement
8. Click on the **Participant Name**
9. Click **Edit**
10. Paste the Special Requirement in the corresponding field
11. **Save** the record

13.3 Daily Check: Bookings Eligibility Check on Events Marked Special/External Events

1. Go to the area in which the report is saved
2. **Click on the title** of the report
3. Check any bookings for eligibility e.g. that they are from the correct institution or have the correct MIS status
4. Cancel any bookings as required and inform the participant of why their booking has been cancelled

13.4 Daily Check: Event Attendance Not Yet Updated

1. Go to the area in which the report is saved
2. **Click on the title** of the report
3. Chase in any registers for events listed or update attendance if the register has already been received

13.5 Daily Check: Events in the Future with Standby or Wait List and Daily Check: Courses (All) with a Standby or Wait List

1. Go to the area in which the reports are saved
2. **Click on the title** of the report
3. Set up extra events, as required, remembering to ensure the ‘extra’ flag is ticked when the event is set up

13.6 Daily Check: Events with Low Numbers

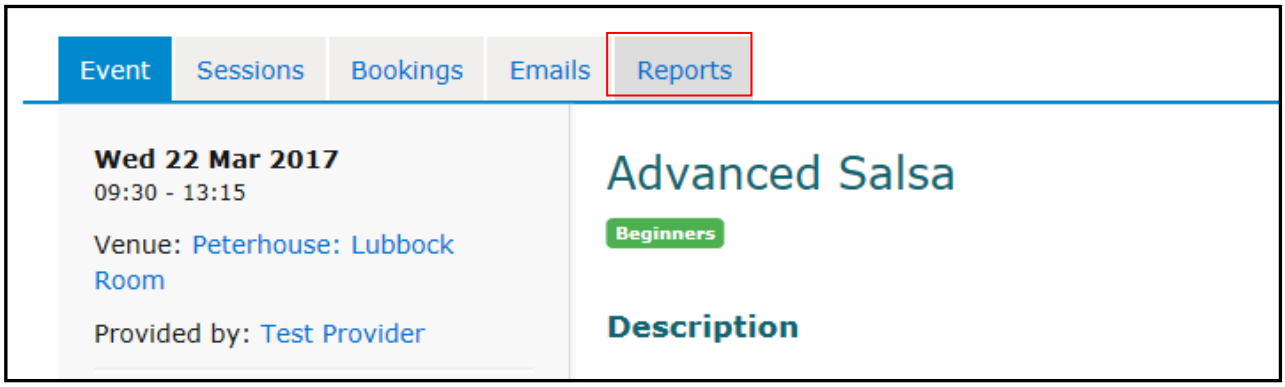
1. Go to the area in which the report is saved
2. **Click on the title** of the report

Copyright © 2010 University of Cambridge

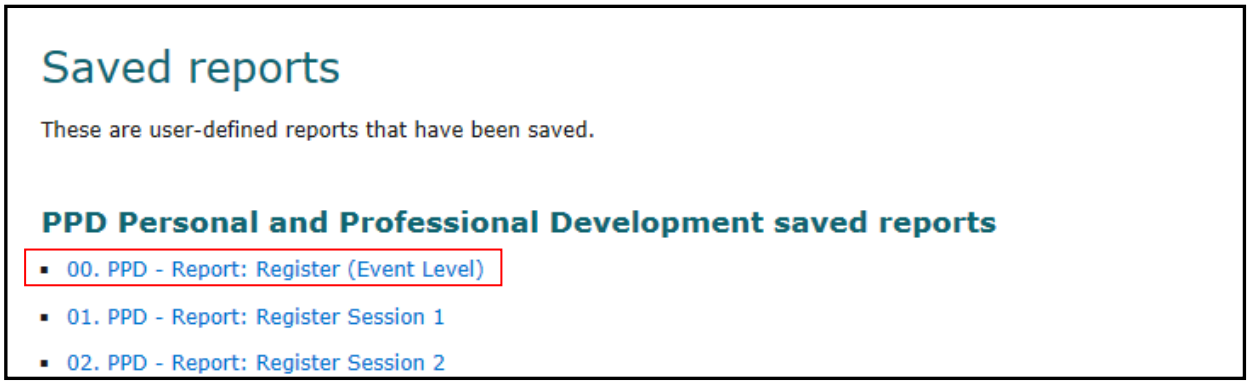
3. Cancel or advertise the event as required
4. You may also wish to email the participants to ask them to confirm their attendance

13.7 Printing a register/participant list

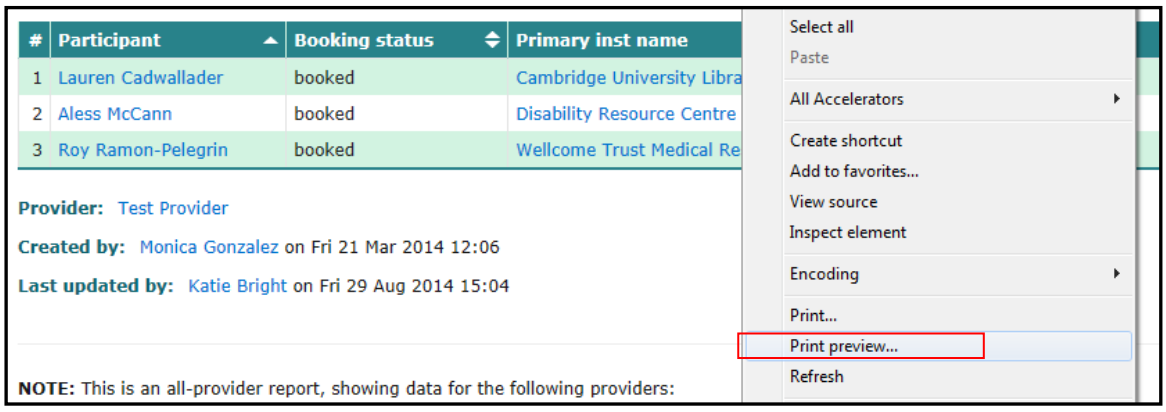
1. Go to the area in which the report is saved e.g. the Event **Reports tab**



2. **Click on the title** of the report e.g. Report Register (Event Level)



3. Click **File**, **Print Preview**



4. Change the page layout to **Landscape** and Print
5. Send the hard copy to the tutor/venue
6. If an email copy is required you can export the report to excel by selecting D**ownload: Full report** in the report screen (just above the report table)

Copyright © 2010 University of Cambridge

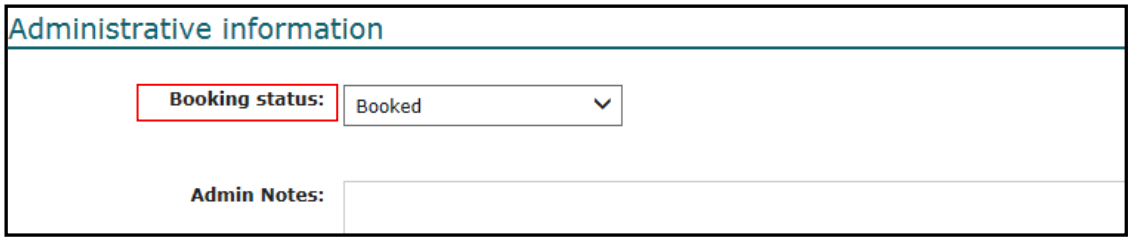
14 Manual Administration

14.1 Promoting People on the Waiting List

- May be used when a special request has been received for someone to attend an event but the event is already full, e.g. a request from HR
- This procedure will not grant the person a place but will mean they will be the first person to be offered a place if any cancellations are received.
- If the person does not already have a waiting list place you will need to make a third party booking for them.

1. Navigate to the **Event**
2. Click on **Edit**
3. Click on the **Automated emails** link (at the top of the page)
4. Under Send emails: un-tick **Send automated emails automatically** but keep the **Event reminder ticked**
5. Make a note in the **Admin notes** (preceded with your initials, time and date) that you have made this change e.g. **MG 12/12/2016 12:00 Disabled auto emails in order to promote [[person/x | x]] in the wait list**
6. Click **Save**

- Keep a daily check on the event for any cancellations (this can be viewed through the Bookings tab or in the recent bookings report). If a cancellation does come through carry out the following steps:
  1. In the event **Bookings tab**, click on the **name of the participant** who you want to attend the event
  2. Click on Edit details and change the Booking status to **Booked**



  3. Click **Update booking**
  4. Click the **Event name** to get back to the **Event**

5. Go the **Email tab** for the event, click on **Compose email**
6. Send the template email **Confirmation – Booking** to this participant only
7. In the **Bookings tab** for the event check if any more cancellations have been received.If they have, manually change the Booking status of the next person on the waiting list to **Booked** by editing the booking details and then send them a **Confirmation – Booking** email

- You can check the booking time in the bookings tab and their status will have changed to 'no response' or 'place offered'

1. In the Event, click on **Edit**
2. Re-enable the auto emails back by ticking **Send automatically emails automatically**
3. Make a note in the **Admin notes** of what has been done (state initials, time and date) e.g. **MG 12/12/2010 12:00 Re-enabled auto emails after promoting [[person/x | x]] in the wait list**
4. Click **Save**

14.2 Granting 3rd party booking privileges to none TP staff

- For people who need to make 3rd party bookings on a regular basis. **This privilege is a high level privilege so should only be given to key contacts for your training provision** e.g. departmental administrators, CHRIS contacts etc.

1. Ensure that your **Provider** is selected
2. **Search** for the participant CRSid or surname
3. Click on the **Name** of the participant
4. Click on the **Permissions** tab
5. Click **Edit**
6. Under role: **Viewer** click on **Choose individual privileges** and select the following:
   - search-people
   - view-3rd-party-booking
   - view-person-details
   - Under role: Training administrator click on Choose individual privileges and select the following: create-3rd-party-booking
7. Click **Save.** This person will now be able to make 3rd party bookings for your provider only.
8. Send the person details of how to carry out 3rd party bookings (see separate document)

14.3 Manually changing a booking status

- Any changes to a booking status should always be documented in the admin notes of the booking preceded by initials and date e.g. MG 12/1/2016 Booking status changed to Booked followed by the reason why.

Note: *Manually changing booking details will not send out automatic emails or initiate the automatic wait list mechanism.*

Copyright © 2010 University of Cambridge

15 Postponing and Re-scheduling Events

- If courses are postponed it is assumed that they will be re-scheduled at some near date and the bookings will be transferred to the original date when participants can cancel their booking if they cannot attend.
- Re-scheduled events should have a cloned event (scheduled at the original time not the new time) which is marked as postponed with a link referencing the new re-scheduled event which would have been moved to a new date along with the bookings.

15.1 Postponing the event without yet knowing a future date

1. Navigate to the **Even**t
2. Click **Edit**
3. Change the **Status** to **Postponed** and untick the boxes **Allows bookings, show on timetable, show in themes, show in search**
4. In **Admin Notes** make a note preceded by your initials and date as to reason e.g. **MG 12/12/2016 Course postponed due to trainer illness**
5. Click **Save**
6. Click the **Emails** tab, click **Compose email**
7. Choose **Course postponed** under Select email type:
8. Choose **Course postponed** email type
9. Click **Next**
10. Choose Booking status– **Booked, Standby and Offered**
11. If the trainer is to be bcc'd leave the box ticked
12. Click **Next**
13. Add any text to the email as required e.g. we will notify you when we re-schedule the event
14. Click **Send**

- Once date is known:

15. **Navigate** to the original event, make a note of the start date and click **Clone**
16. Pick the exact original start date and click **Save**
17. **Edit** the event and change the status to **postponed**
18. Navigate to original event (the one with bookings) and click **Move**
19. Pick the new re-scheduled date
20. Click **Save**

21. In the newly moved event (the one with the bookings) **Edit** the event and create a link to cloned postponed event
22. **Edit** the moved event
23. Change the status to **Published** and add a note in the event admin notes with a link to the postponed cloned event **e.g. MG 12/12/2016 Event re-scheduled from [[event/12345 | 3rd Feb]]**
24. Click **Save**
25. In the **Emails** tab, click **Compose email**
26. Choose **Course rescheduled** email type
27. Click **Next**
28. Choose Booking status – **Booked, Standby and Offered**
29. If the trainer is to be cced leave the box ticked
30. Click **Next** and **Next** again
31. Click **Send**
32. **Navigate** to the cloned postponed event (the one without bookings) and in the admin notes add a note and a link to the newly re-scheduled event e.g. **MG 12/12/2016 Event re-scheduled to [[event/5555 | 3rd March]]**

15.2 Postponing and rescheduling an event in one go

Follow the same procedure for postponing an event as above but start at point 15

16 Adding Links to Text Fields

- Every time a course, event, booking, person, email or external link is referenced within the UTBS in text fields, please add a link to the relevant item in order that it eases navigation.

16.1 Internal Links

- It is more common to reference a course, rather than an event, when referencing from outside of the system, as once an event has finished the link will not work for the end user. Whereas a link to the course will show all other events for that course in the future.

	Syntax	Displays as:
Course	**[[course/cppd-orient3 | Welcome to Cambridge]]**	Welcome to Cambridge
Event	**[[event/44621 | Web Authoring]]**	Web Authoring
Booking	**[[booking/1111 | Booking for M Gonzalez]]**	Booking for M Gonzalez
Person	**[[person/kb377 | Katie Bright]]**	Katie Bright

16.2 External Links

- When referencing an external site outside of the UTBS use the following syntax:
  [<url> <text to display>]
- It is important that there is a space between the URL and the text to display e.g. **[http:// http://www.tie-a-tie.net/ How to tie a tie]**

16.3 Mailto Links

- When referencing email addresses, in order that your mail user agent pops up a new email template with the person's email address use the following syntax:
  [mailto:<email address> <Display name>]
- It is important that there is a space between the URL and the text to display e.g. **[mailto:Katie.Bright@admin.cam.ac.uk Katie Bright]**

End

Copyright © 2010 University of Cambridge