Contact North | Contact Nord

Ontario's Distance Education & Training Network
Le réseau ontarien d'éducation et de formation à distance

Online Booking Tool
User Manual
for
Educational Partners

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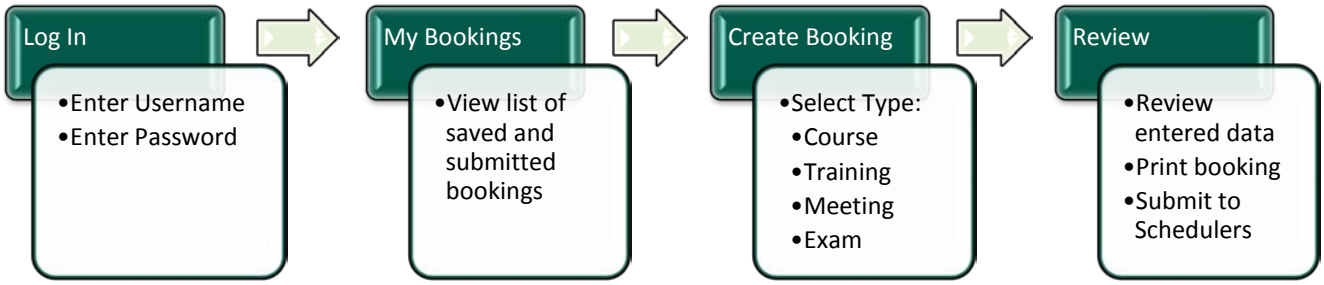
Introduction

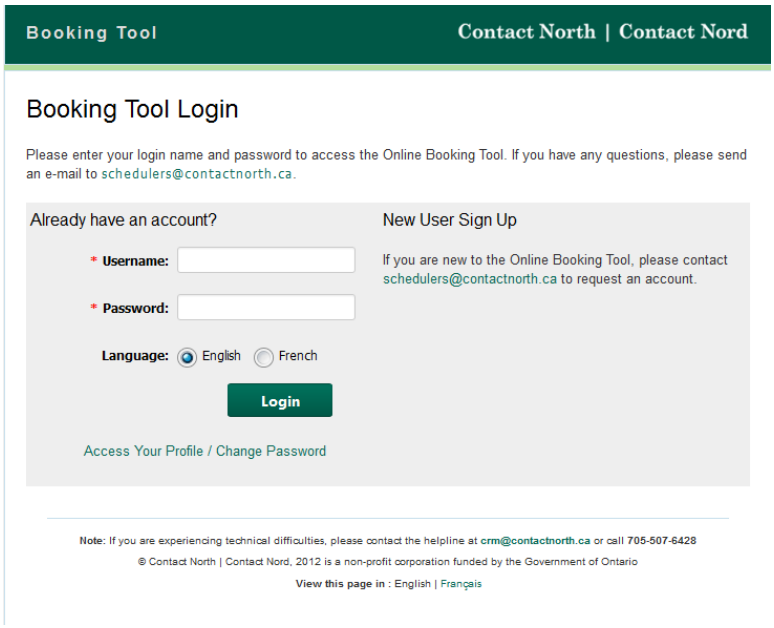
This guide is meant to help you through the most used booking processes. Please refer to the table of contents on page 2 for a complete listing of topics.



Throughout the Booking process, you will find ( ) this icon. It is for information purposes and will provide definitions for the terms used in the form.

Logging In

This is the login page for the Online Booking Tool.

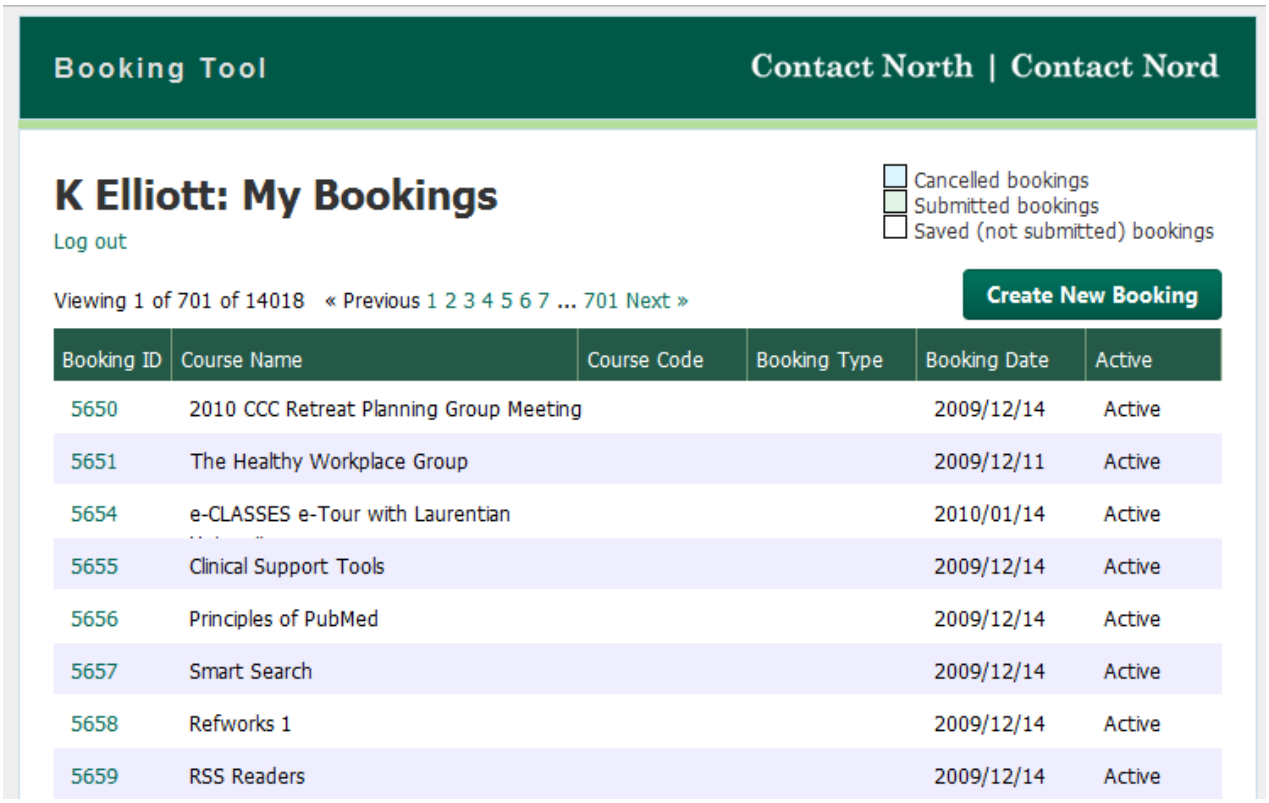


1. Enter your username and password
2. Select your preferred language
3. Click the “Login” button
4. If you don’t have an account, send an email to schedulers@contactnorth.ca to request one.

If you have an account but cannot login, contact the CRM Helpline at 705-507-6428 or email crm@contactnorth.ca. Someone will contact your within 24 business hours.

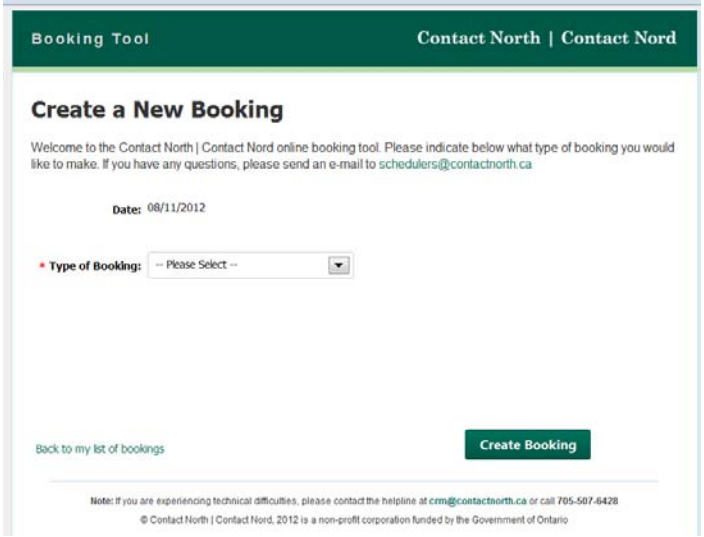
Creating a new booking

This is the My Bookings page. It is the first page you will see when you login. From this page, click on the "Create New Booking" button.



Types of Bookings

1. Select the type of booking you wish to create.

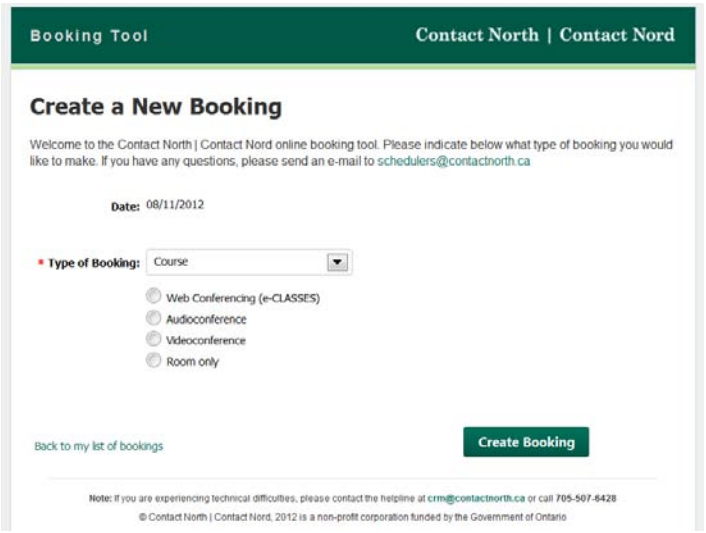


Types of Booking

Select one of the following, from the drop down list:

- Course
- Training
- Meeting
- Exam

2. Select additional booking options.



Additional Booking Options:

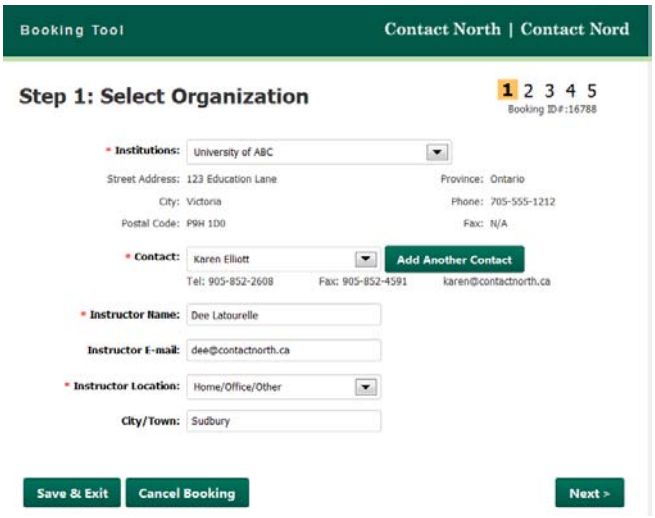
Select one of the following: from the drop down list:

- Web-Conferencing (e-Classes)
- Audioconference
- Videoconference
- Room only

Once you have selected the type of booking and additional options, click on the “Create Booking” button on the bottom right.

Section A: Booking Type - Course

Step 1: Select Organization



*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

Field Name	Instructions
Institution	This field displays the name of your institution.
Contact	Select the contact at the institution responsible for this course. *If the desired Contact is not in the list, you can add them by clicking the "Add Another Contact" button (see the next page to learn how to add a contact).
Instructor Name	Enter the name of the person providing instruction for this course
Instructor e-Mail	Enter e-mail address for instructor
Instructor Location	1. For Instructor Location, select either Contact North Centre or Home/Office/Other 2. If you selected Contact North Centre, you now need to select the centre 3. If you selected Home/Office/Other, you must enter Town or City location 4. If location is unknown, select Home/Office/Other and enter TBD

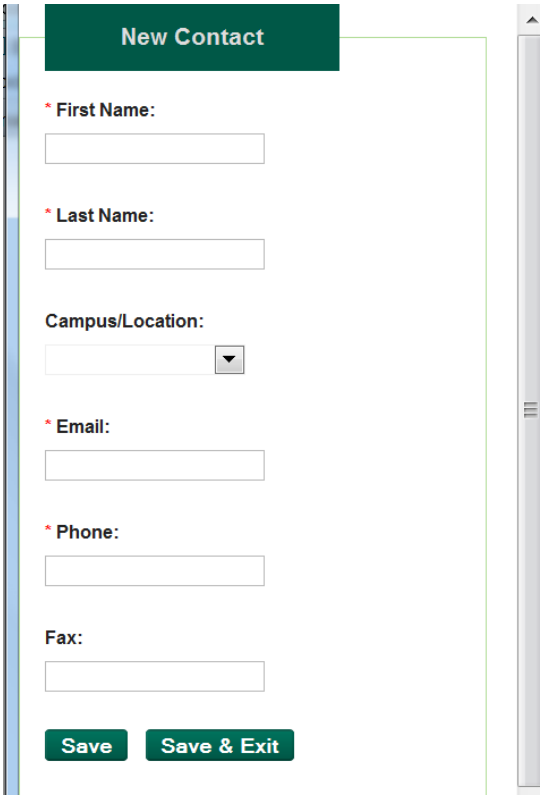
Once your selections are made, you have three options:

- Click "Next" to continue
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Adding a Contact

1. Click on the “Add Another Contact” button.

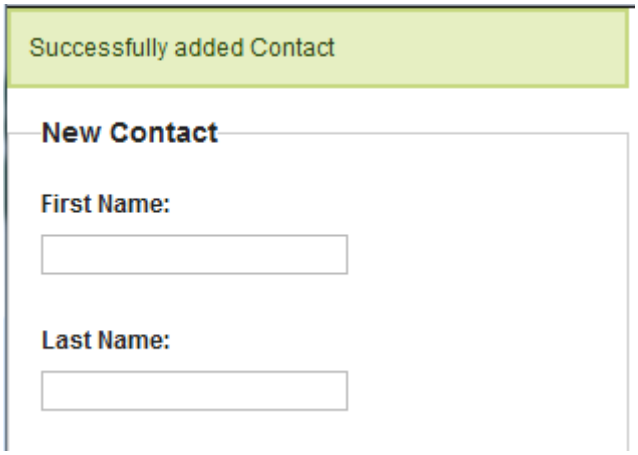
2. A new window will open.
Fill out the form the resulting form. A detailed list of fields is available on the next page.



3. Click on the “Save” button at the bottom of the form.

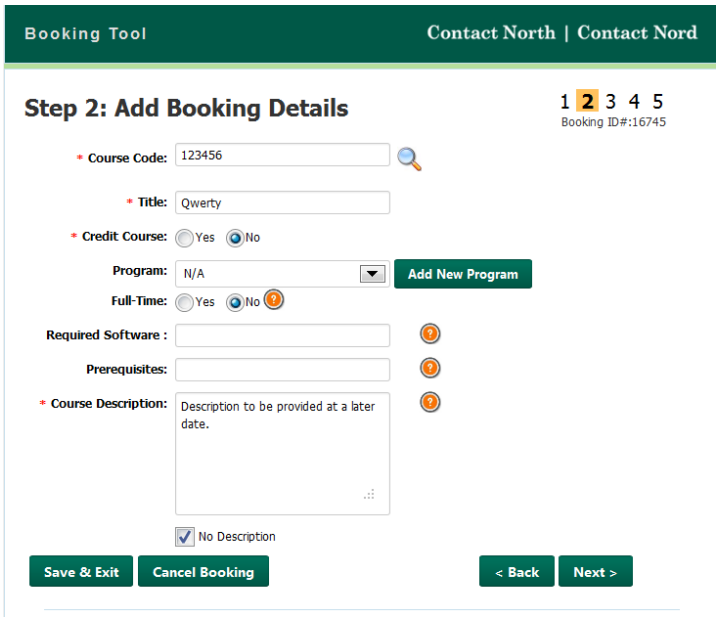
4. You will receive confirmation that the entry has been added.

5. Click on the “Save & Exit” link to return to the booking. (Do NOT X out to close the window or your contacts will not be saved.



Field Name	Instructions
Save	When all information is entered, click on “Save” or your changes will be lost.
Save & Exit	Click on “Save & Exit” to close this window.

Step 2: Add Booking Details



*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

Once the fields are completed, you have four options:

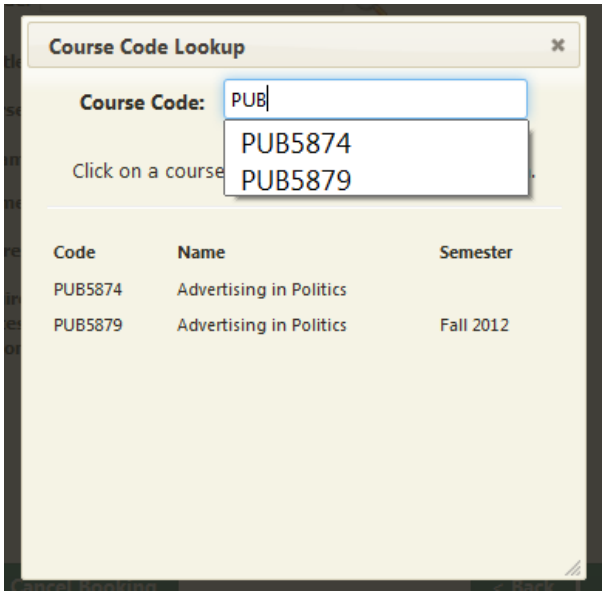
- Click "Next" to continue
- Click "Back" to go back one page
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Field Name	Instructions
Course Code	Enter the course code for the course.
Title	Enter the course name.
Credit Course	Tell us whether this course will give the student a credential towards a diploma/degree.
Program	Select the program this course is associated with. If the program does not exist, click on Add New Program.
Program Full-Time	Tell us whether this course is part of a full-time program.
Required Software	Enter name of the software required (if any) to participate in this course. Please note prior approval of the software to be installed on CN equipment is required. Software must be provided by the institution.
Prerequisites	Enter name or course code of any course(s) that must be taken prior to taking this one.
Course Description	Enter a brief description for this course.
No Description	Check this box if no course description is available.

Searching for a Course Code

1. In Step 2, click on the magnifying glass icon next to the course.

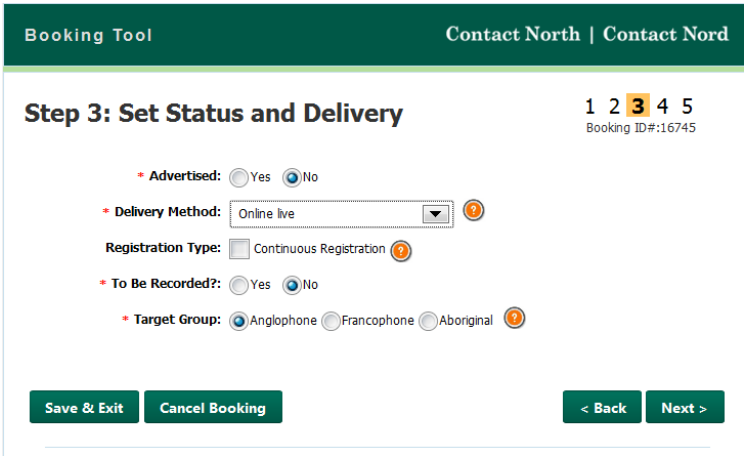
2. A new window will open. Begin typing in the Course Code. Results will appear as you type. Stop typing once the desired Course is displayed in the list.



3. Click the Course Code of the desired course.

4. The Course Code Lookup window will disappear. You will be returned to the booking form. The selected Course's information will have been filled out. You can now continue the process and this will create a new booking for the course.

Step 3: Set Status and Delivery



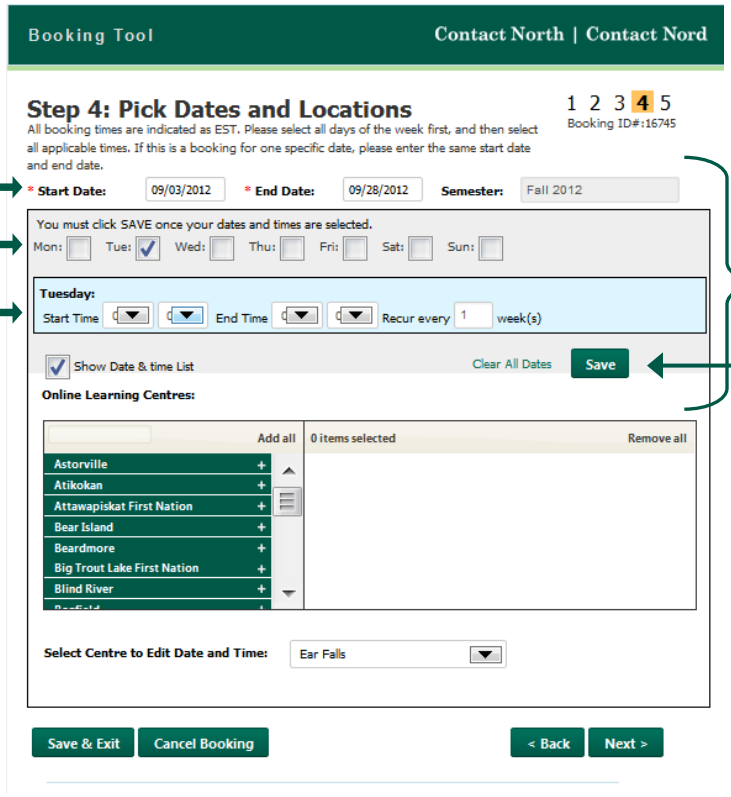
*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

Field Name	Instructions
Advertised	Select whether you want us to promote your course online and in our course guide.
Delivery Method	Select the delivery method for this course.
Registration Type	Check if this course is available for continuous registration.
To Be Recorded?	Tell us whether you want to record this course. Note: if the recorded option is chosen, instructor must click on the record button when starting the class in order for the recording to start.
Target Group	Select the group this course is aimed at serving.

Once the fields are completed, you have four options:

- Click "Next" to continue
- Click "Back" to go back one page
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Step 4: Pick dates and Locations



*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

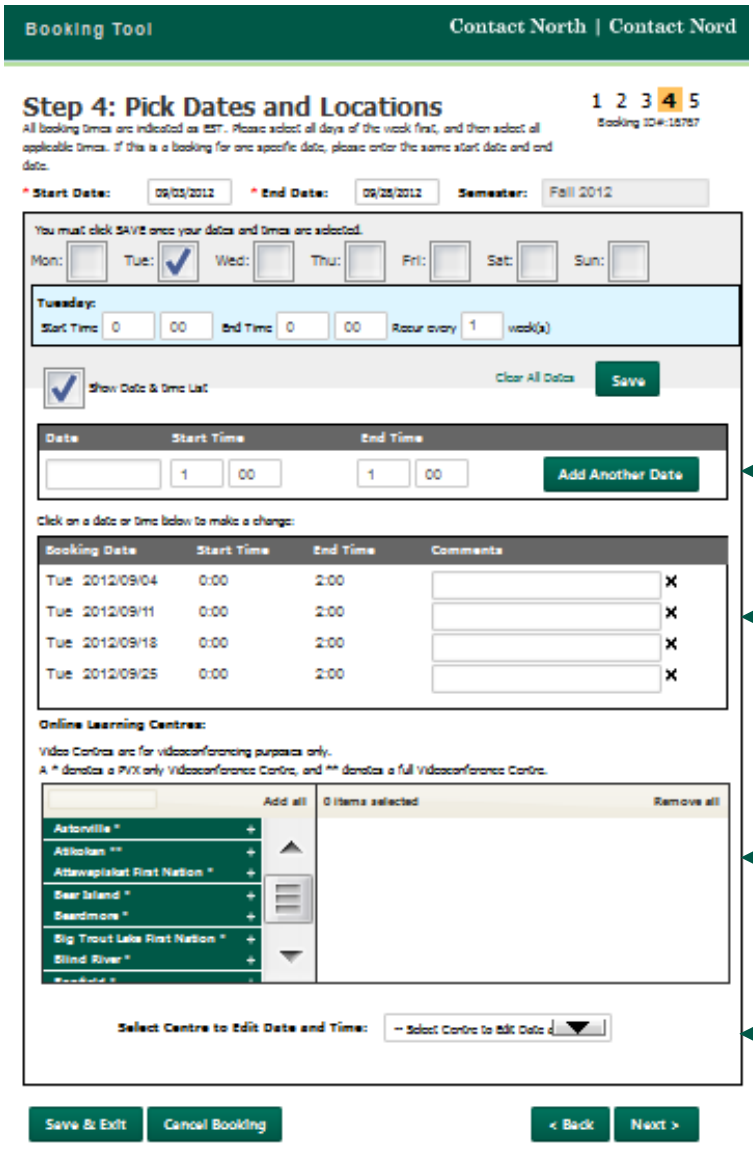
Complete this area first.

You must click save to proceed beyond this point.

Field Name	Instructions
Start Date	Enter the course start date
End Date	Enter the course end date
Days	If course is online live, select the chosen days for each class.
Times	For each day you selected, enter a start time and end time
SAVE	You must click this to proceed or you will lose the dates and times you selected.

See what happens after you click SAVE, on the next page.

View/Edit Dates and Times



Add individual dates and times here..

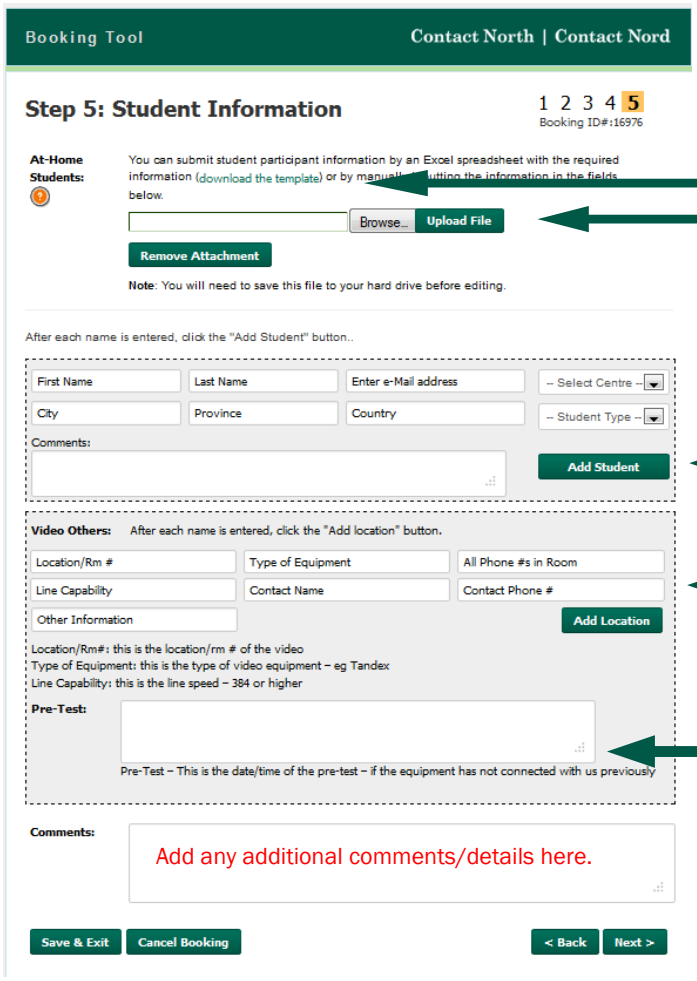
The class dates you selected can be edited/removed from here.

Book any of our centres by clicking on the "+" symbol.

You can edit dates and times for specific centres, here.

Field Name	Instructions
Online Learning Centres	Select a centre on the left by clicking on the "+" symbol next to it. To remove them from the right column, click on the "-" symbol next to it.
Edit Dates and Times by Centre	You can edit dates and times for the centres you selected.

Step 5: Participant Information



Download our student list template here. (see Appendix 1)

Find and upload your saved student list from here. See instructions, below.

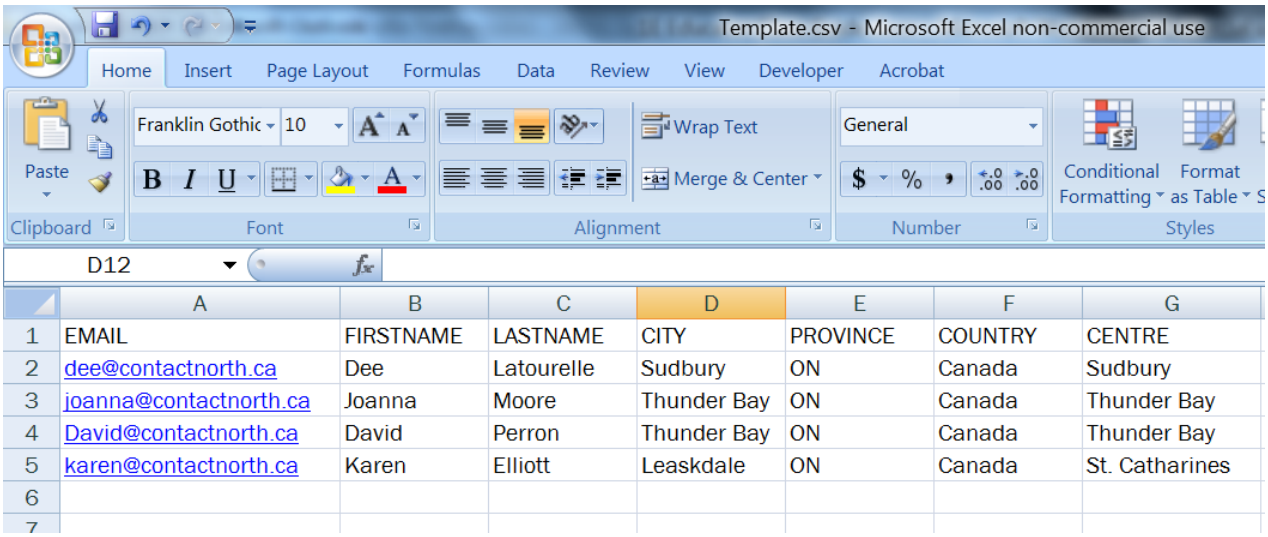
Students can also be entered, one at a time, by filing in the details and clicking "Add Student"

Add contact and technical details for alternate locations here (other than at an Online learning Centre.

DO NOT COMPLETE FOR INTERNAL PURPOSES ONLY

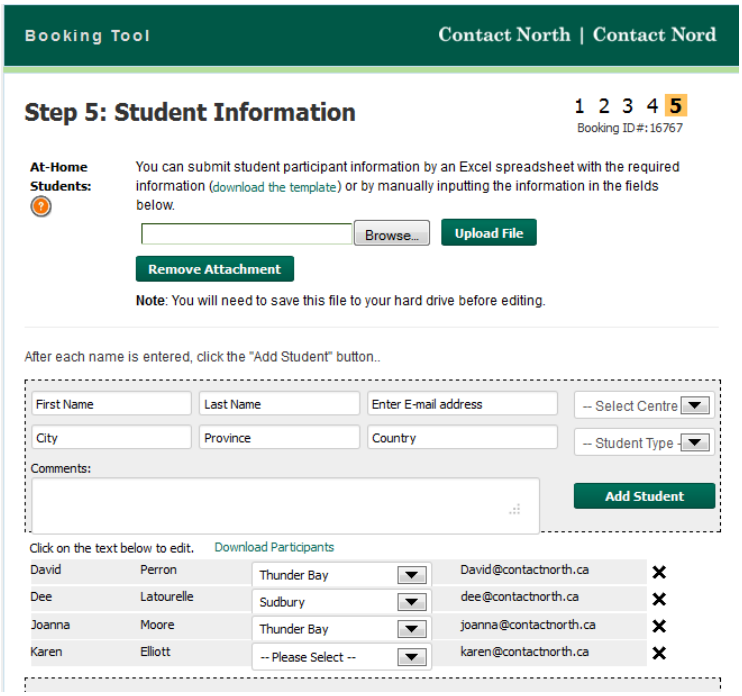
Field Name	Instructions (see Appendix 1 for sample upload)
"download the template"	Click on this link to download the Excel template so that you can create a list for upload rather than entering names one at a time. When you get the download popup, select "Save File" and click OK. 1. Name your file and save it (remember where you save it; you'll need it again soon) 2. Open it to fill it in. 3. Save your changes. 4. Click on "Browse" to find the file 5. Click on"Upload File" to populate your list on this form.

Appendix 1: Participant template



	A	B	C	D	E	F	G
1	EMAIL	FIRSTNAME	LASTNAME	CITY	PROVINCE	COUNTRY	CENTRE
2	dee@contactnorth.ca	Dee	Latourelle	Sudbury	ON	Canada	Sudbury
3	joanna@contactnorth.ca	Joanna	Moore	Thunder Bay	ON	Canada	Thunder Bay
4	David@contactnorth.ca	David	Perron	Thunder Bay	ON	Canada	Thunder Bay
5	karen@contactnorth.ca	Karen	Elliott	Leaskdale	ON	Canada	St. Catharines
6							
7							

Once you upload this completed template, here's what you'll see:



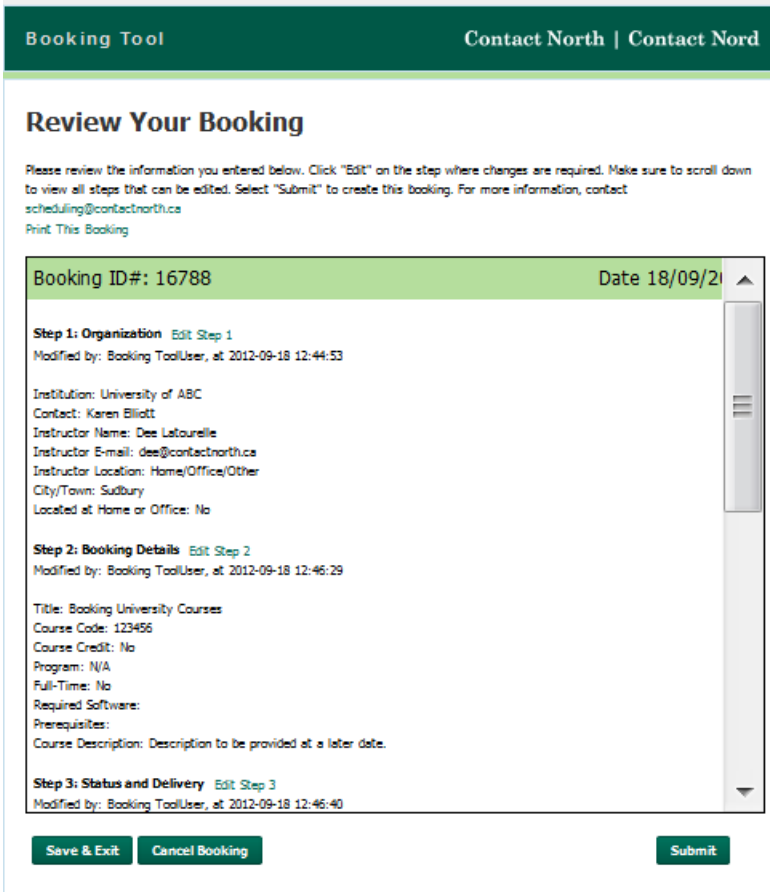
Here's the list of names that were uploaded, using the template provided.

Once your selections are made, you have four options:

- Click "Next" to continue
- Click "Back" to go back one page
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Review Your Booking

You can now review the information you provided.



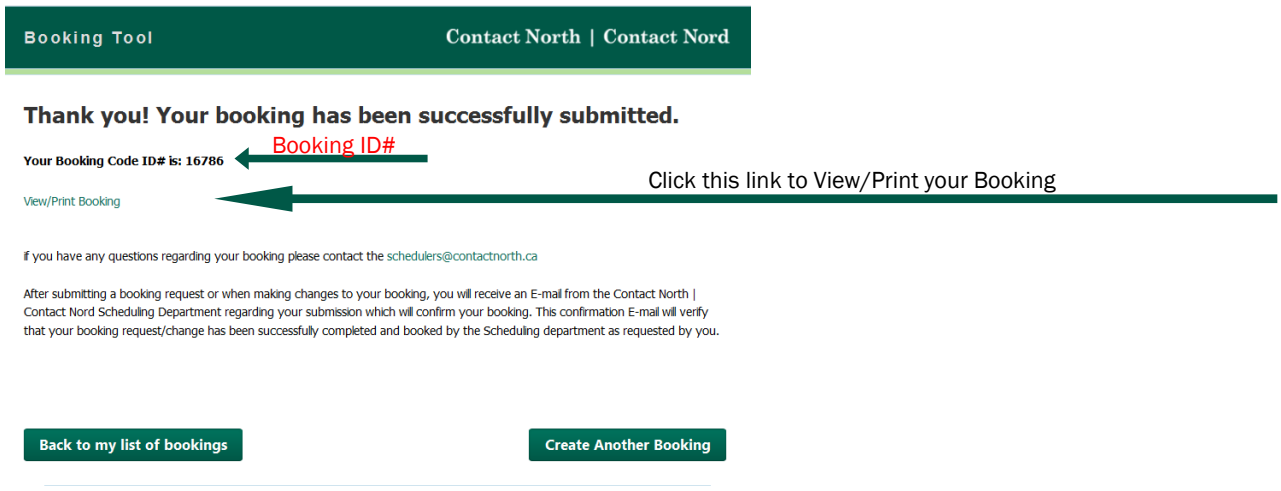
You can scroll through this page to look at what you entered at each step of the process. If changes are required, you can click on the green "Edit Step#" links, provided at the top of each step.

Once your selections are made, you have three options:

- Click "Submit" to send your request to Contact North |Contact Nord schedulers
- Click "Save & Exit" to submit at a later time
- Click "Cancel Booking" to cancel this booking process

Now that you're created your booking, you will find it listed in your "My Bookings" page when you login to the Booking Tool. To access a booking on the list, click on the Booking ID number.

Booking Confirmation

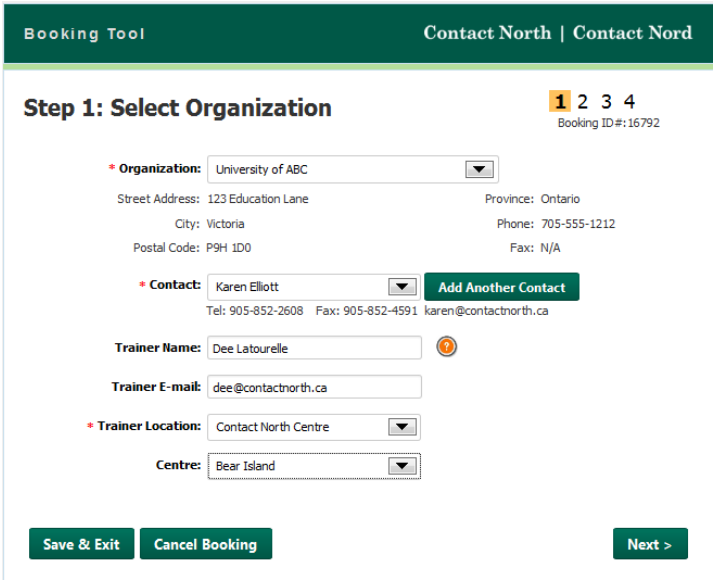


Once you click “Submit”, you will get this confirmation screen. From here you can go back to your list of bookings, create another booking or view/print the booking details.

To exit, close the browser window.

Section B: Booking Type - Training

Step 1: Select Organization



*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

Field Name	Instructions
Organization	This field displays the name of your organization.
Contact	Select the contact at the organization responsible for this Training. *If the desired Contact is not in the list, you can add them by clicking the "Add Another Contact" button (see the next page to learn how to add a contact).
Trainer Name	Enter the name of the person providing training
Trainer e-Mail	Enter e-mail address of the trainer
Trainer Location	5. For Trainer Location, select either Contact North Centre or Home/Office/Other 6. If you selected Contact North Centre, you now need to select the centre 7. If you selected Home/Office/Other, you must enter Town or City location 8. If location is unknown, select Home/Office/Other and enter TBD

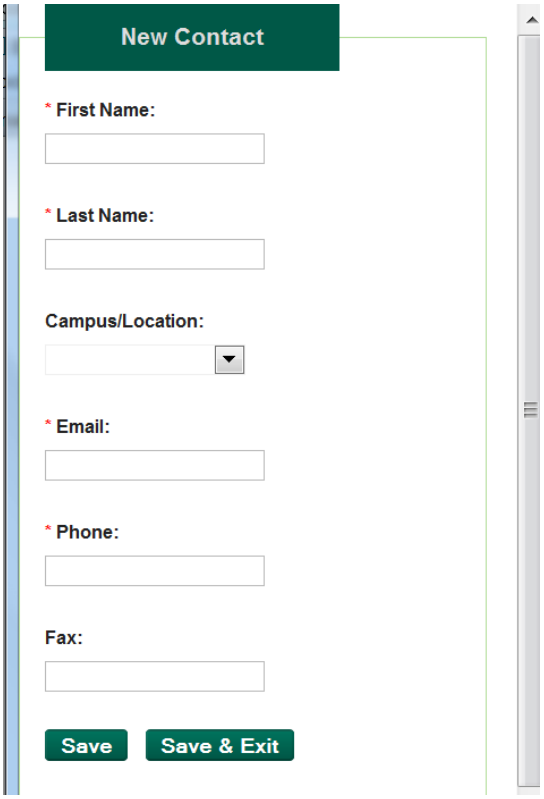
Once your selections are made, you have three options:

- Click "Next" to continue
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Adding a Contact

1. Click on the "Add Another Contact" button.

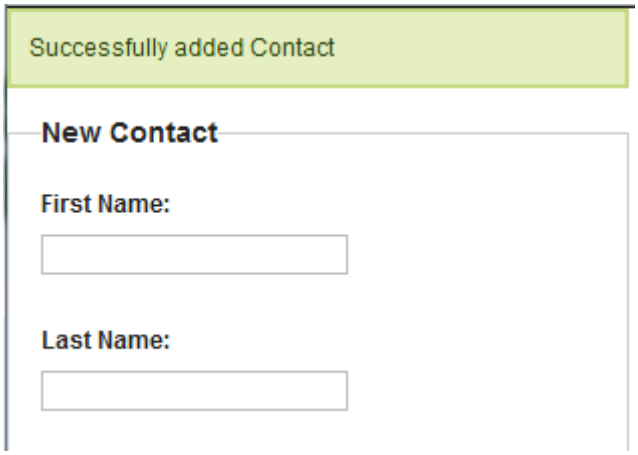
2. A new window will open.
Fill out the form the resulting form. A detailed list of fields is available on the next page.



3. Click on the "Save" button at the bottom of the form.

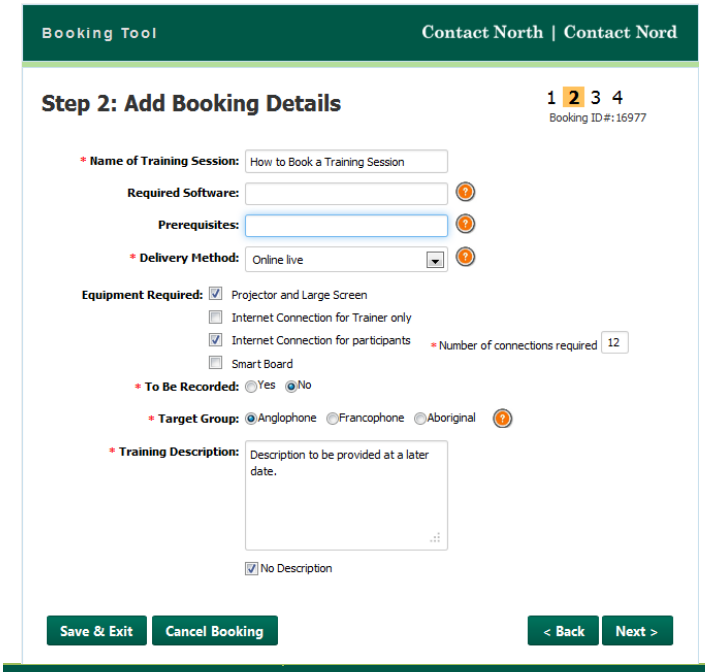
4. You will receive confirmation that the entry has been added.

5. Click on the "Save & Exit" link to return to the booking. (Do NOT X out to close the window or your contacts will not be saved.



Field Name	Instructions
Save	When all information is entered, click on "Save" or your changes will be lost.
Save & Exit	Click on "Save & Exit" to close this window.

Step 2: Add Booking Details



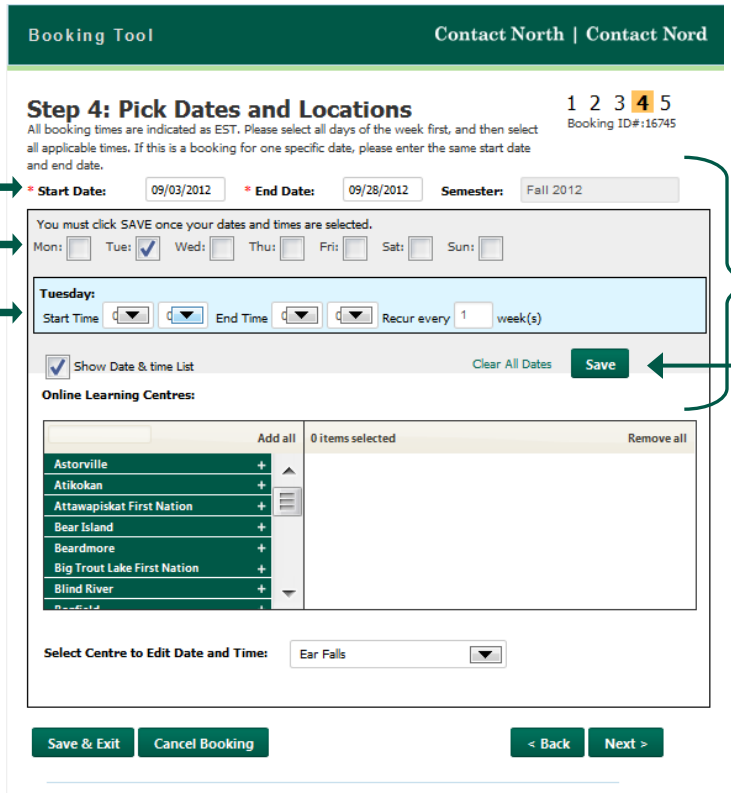
*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

Once the fields are completed, you have four options:

- Click "Next" to continue
- Click "Back" to go back one page
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Field Name	Instructions
Name of Training Session	Enter subject name of training
Required Software	Enter name of software required to participate in this training. Please note prior approval of the software to be installed on CN equipment is required. Software must be provided by the institution.
Prerequisites	Enter name of any training that must be taken prior to taking this one.
Delivery Method	Select the delivery method for this training.
Equipment Required	Select your equipment requirements, here.
To be Recorded:	Tell us whether you want to record this training. Note: if the recorded option is chosen, the trainer must click on the record button when starting the session in order for the recording to start.
Target Group	Select the group this training is aimed at serving.
Training Description	Enter a brief description of training.
No Description	Check this box if no training description is available.

Step 3: Pick dates and Locations



*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

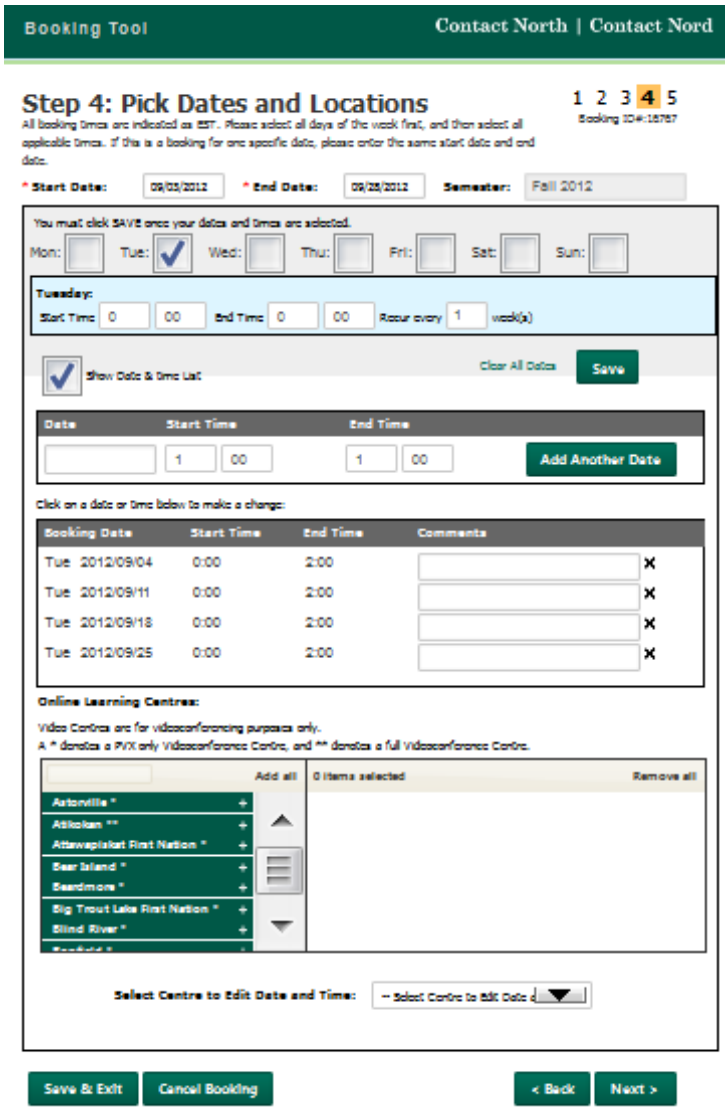
Complete this area first.

You must click save to proceed beyond this point.

Field Name	Instructions
Start Date	Enter the training start date
End Date	Enter the training end date
Days	If training is online live, select the days for each training session.
Times	For each day you selected, enter a start time and end time
SAVE	You must click this to proceed or you will lose the dates and times you selected.

See what happens after you click SAVE, on the next page.

View/Edit Dates and Times



Add individual dates and times here..

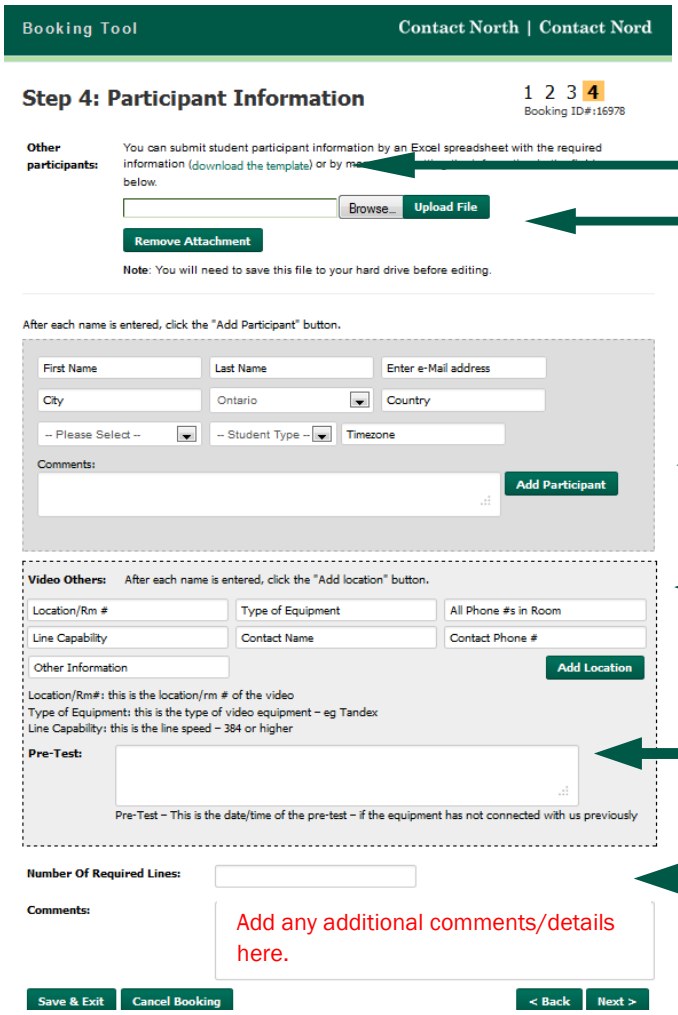
The training dates you selected can be edited/removed from here.

Book any of our centres by clicking on the "+" symbol.

You can edit dates and times for specific centres, here.

Field Name	Instructions
Online Learning Centres	Select a centre on the left by clicking on the "+" symbol next to it. To remove them from the right column, click on the "-" symbol next to it.
Edit Dates and Times by Centre	You can edit dates and times for the centres you selected.

Step 4: Participant Information



Download our participant list template here. (see Appendix 1)

Find and upload your saved participant list from here. See instructions, below.

Participants can also be entered, one at a time, by filing in the details and clicking "Add Student"

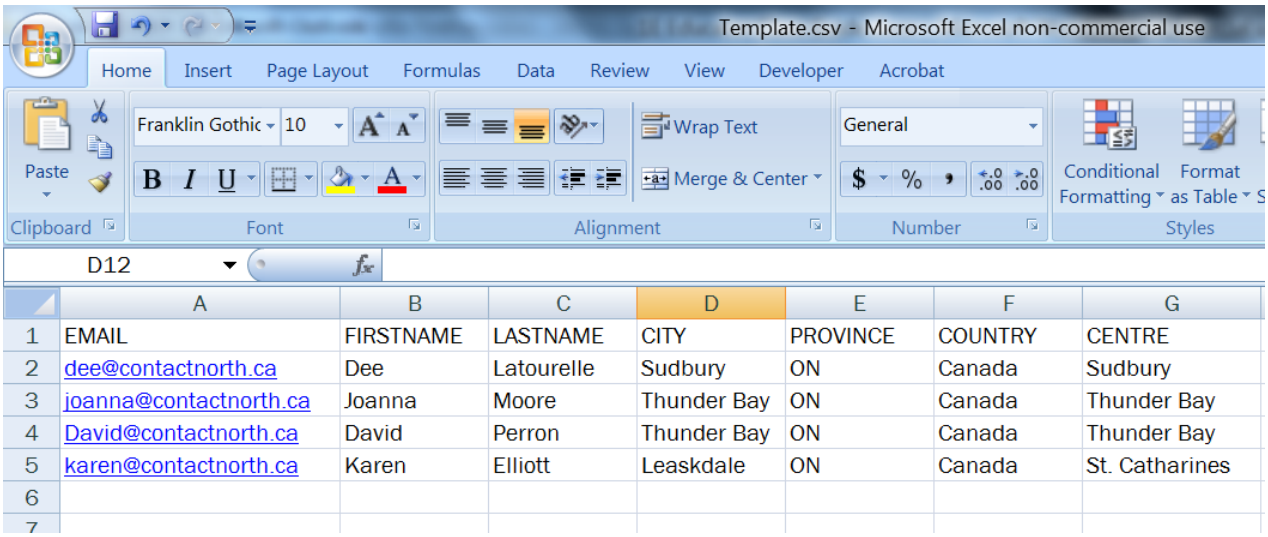
Add contact and technical details for alternate locations here (other than at an Online learning Centre.

DO NOT COMPLETE FOR INTERNAL PURPOSES ONLY

Enter number of participants who will join by audio only

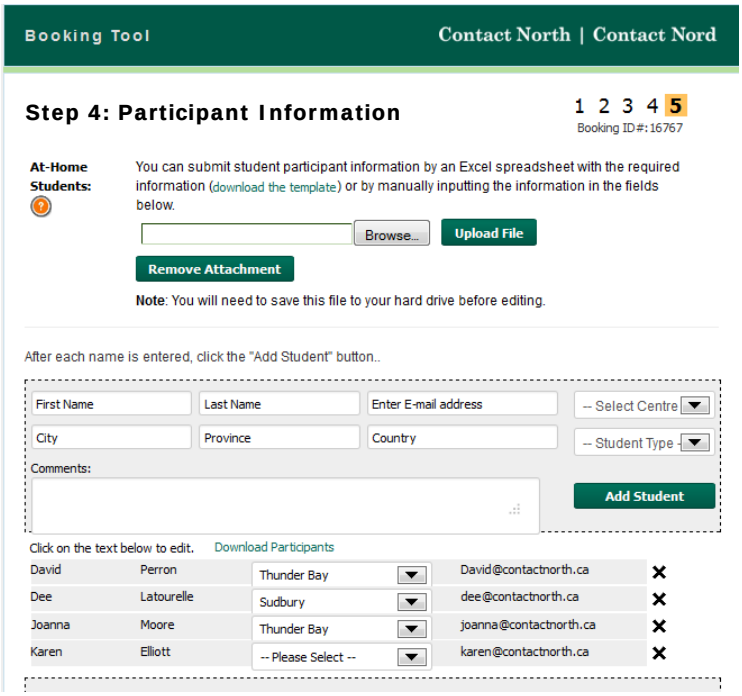
Field Name	Instructions (see Appendix 1 for sample upload)
"download the template"	Click on this link to download the Excel template so that you can create a list for upload rather than entering names one at a time. When you get the download popup, select "Save File" and click OK. 1. Name your file and save it (remember where you save it; you'll need it again soon) 2. Open it to fill it in. 3. Save your changes. 4. Click on "Browse" to find the file 5. Click on "Upload File" to populate your list on this form.

Appendix 1: Participant template



	A	B	C	D	E	F	G
1	EMAIL	FIRSTNAME	LASTNAME	CITY	PROVINCE	COUNTRY	CENTRE
2	dee@contactnorth.ca	Dee	Latourelle	Sudbury	ON	Canada	Sudbury
3	joanna@contactnorth.ca	Joanna	Moore	Thunder Bay	ON	Canada	Thunder Bay
4	David@contactnorth.ca	David	Perron	Thunder Bay	ON	Canada	Thunder Bay
5	karen@contactnorth.ca	Karen	Elliott	Leaskdale	ON	Canada	St. Catharines
6							

Once you upload this completed template, here's what you'll see:



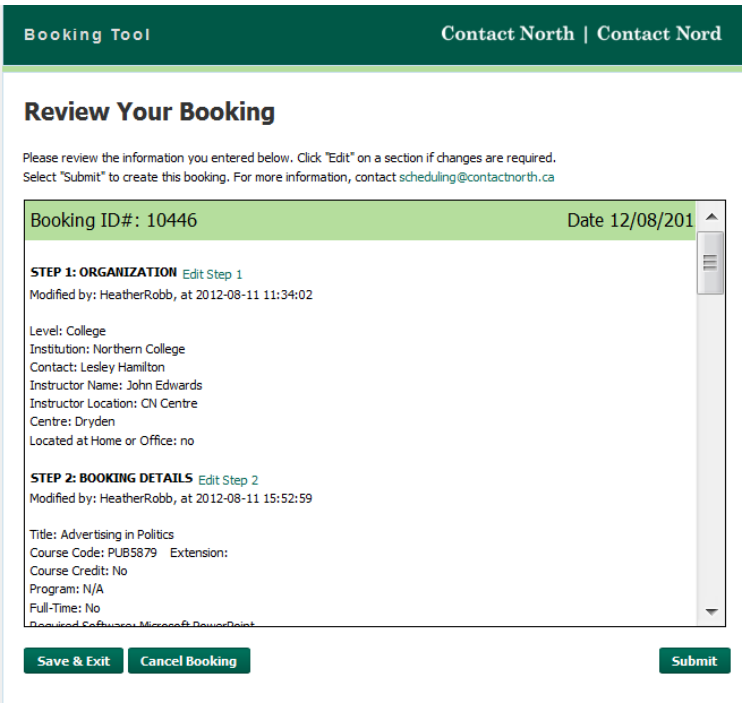
Here's the list of names that were uploaded, using the template provided.

Once your selections are made, you have four options:

- Click "Next" to continue
- Click "Back" to go back one page
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Review Your Booking

You can now review the information you provided.



You can scroll through this page to look at what you entered at each step of the process. If changes are required, you can click on the green "Edit Step#" links, provided at the top of each step.

Once your selections are made, you have three options:

- Click "Submit" to send your request to Contact North |Contact Nord schedulers
- Click "Save & Exit" to submit at a later time
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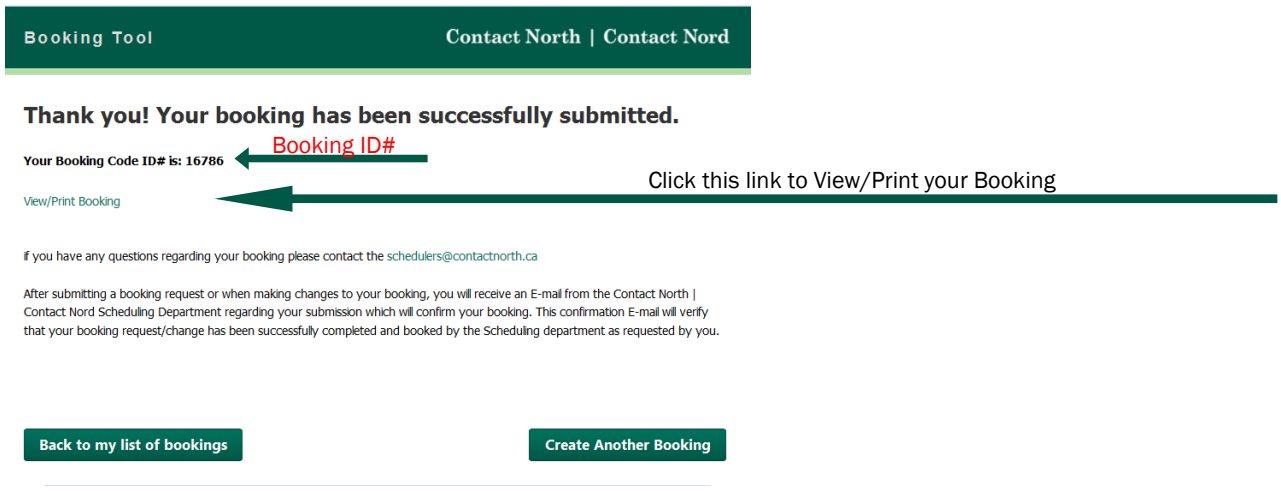
Booking Confirmation

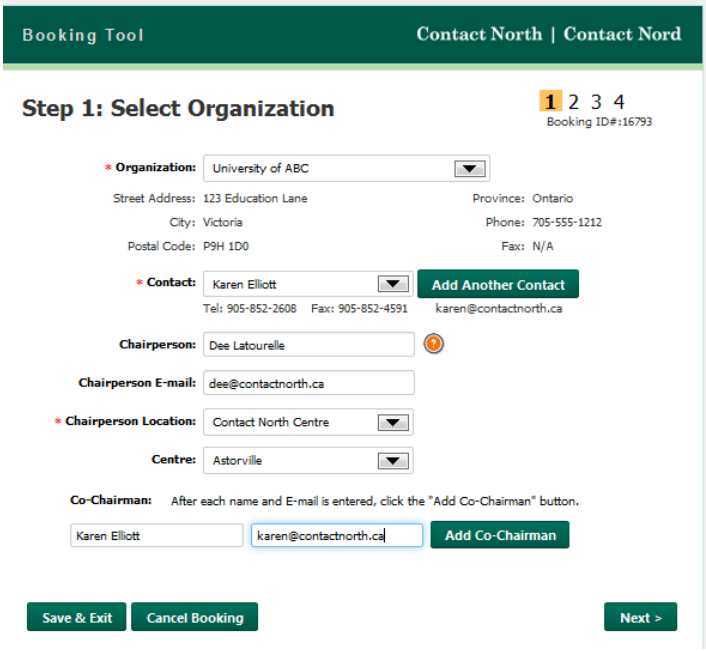


Once you click “Submit”, you will get this confirmation screen. From here you can go back to your list of bookings, create another booking or view/print the booking details.

To exit, close the browser window.

Section C: Booking Type - Meeting

Step 1: Select Organization



*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

Field Name	Instructions
Organization	This field displays the name of your organization.
Contact	Select the contact at the organization responsible for this Meeting. *If the desired Contact is not in the list, you can add them by clicking the "Add Another Contact" button (see the next page to learn how to add a contact).
Chairperson	Enter the name of the person chairing the meeting
Chairperson e-Mail	Enter e-mail address for the chairperson
Chairperson Location	1. For Chairperson Location, select either Contact North Centre or Home/Office/Other 2. If you selected Contact North Centre, you now need to select the centre 3. If you selected Home/Office/Other, you must enter Town or City location 4. If location is unknown, select Home/Office/Other and enter TBD
Co-Chairperson	Enter details if of people co-chairing this meeting

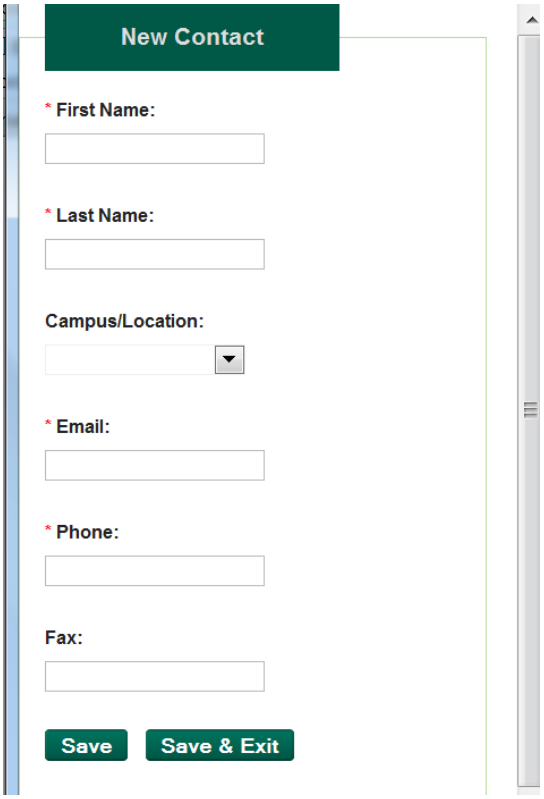
Once your selections are made, you have three options:

- Click "Next" to continue
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Adding a Contact

1. Click on the “Add Another Contact” button.

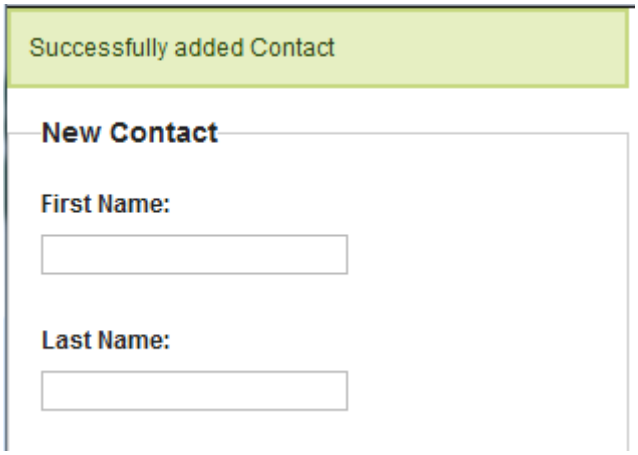
2. A new window will open.
Fill out the form the resulting form. A detailed list of fields is available on the next page.



3. Click on the “Save” button at the bottom of the form.

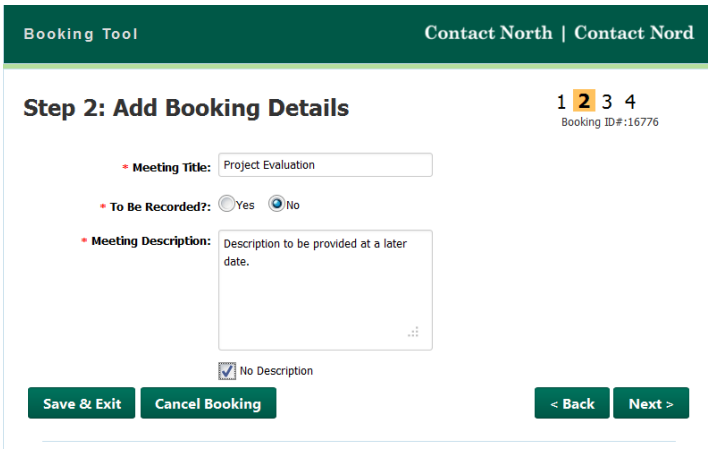
4. You will receive confirmation that the entry has been added.

5. Click on the “Save & Exit” link to return to the booking. (Do NOT X out to close the window or your contacts will not be saved.



Field Name	Instructions
Save	When all information is entered, click on “Save” or your changes will be lost.
Save & Exit	Click on “Save & Exit” to close this window.

Step 2: Add Booking Details



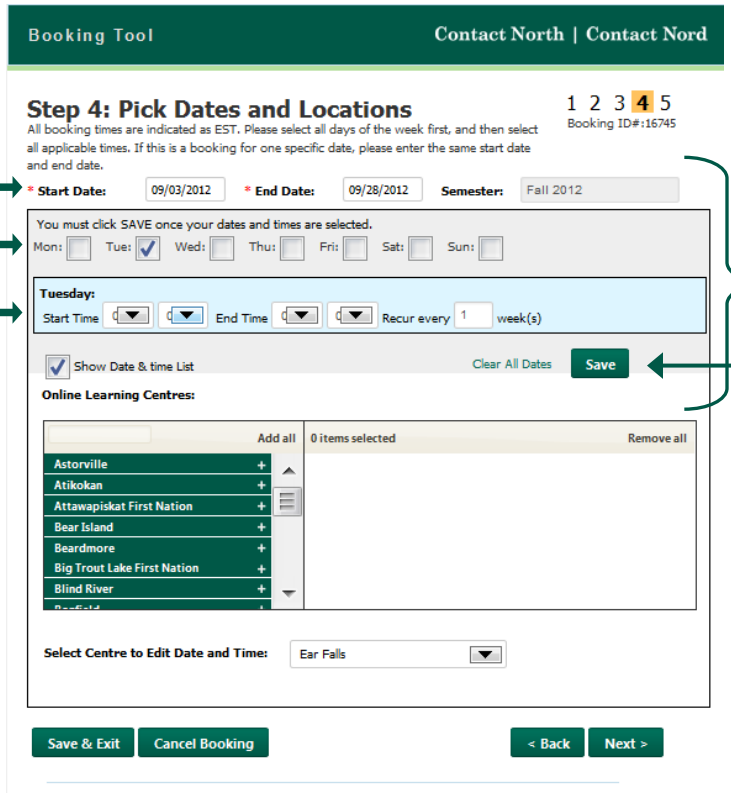
*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

Once the fields are completed, you have four options:

- Click "Next" to continue
- Click "Back" to go back one page
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Field Name	Instructions
Meeting Title	Enter subject name of the meeting.
To be Recorded:	Tell us whether you want to record this meeting. Note: if the recorded option is chosen, the chairperson must click on the record button when starting the meeting in order for the recording to start.
Meeting Description	Enter a brief description for this meeting.
No Description	Check this box if no meeting description is available.

Step 3: Pick dates and Locations



*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

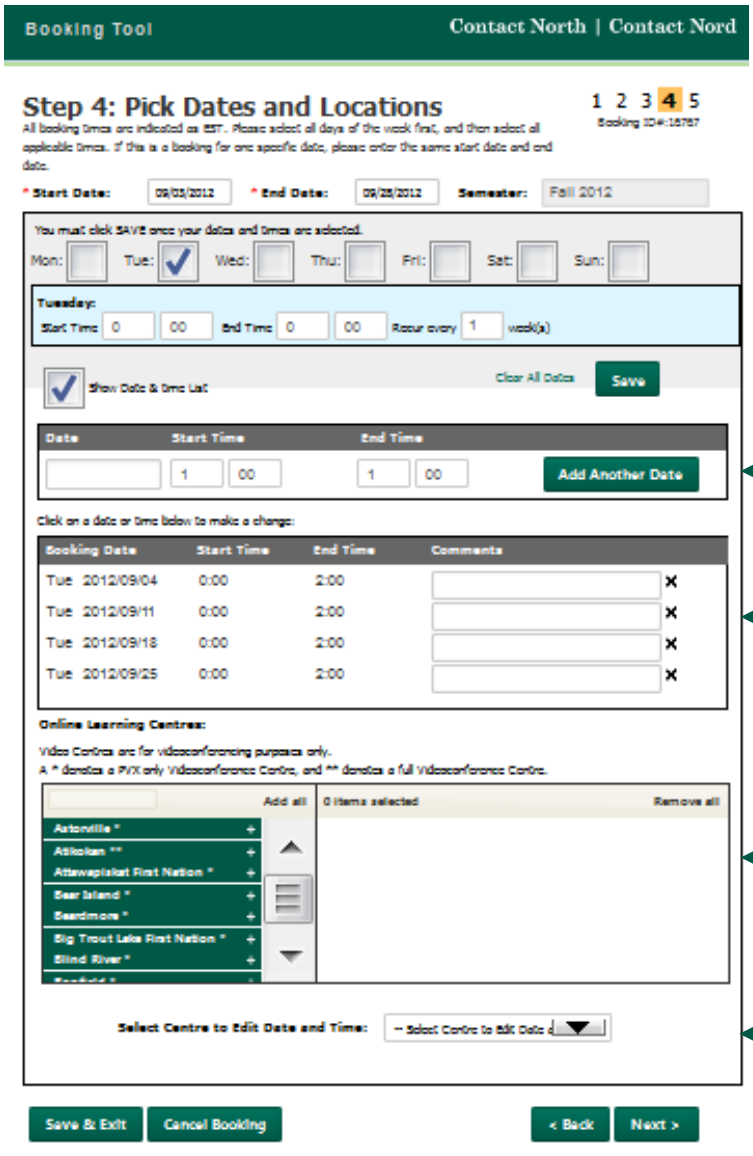
Complete this area first.

You must click save to proceed beyond this point.

Field Name	Instructions
Start Date	Enter the meeting start date
End Date	Enter the meeting end date
Days	If the meeting is online live, select the days for each meeting session.
Times	For each day you selected, enter a start time and end time
SAVE	You must click this to proceed or you will lose the dates and times you selected.

See what happens after you click SAVE, on the next page.

View/Edit Dates and Times



Add individual dates and times here..

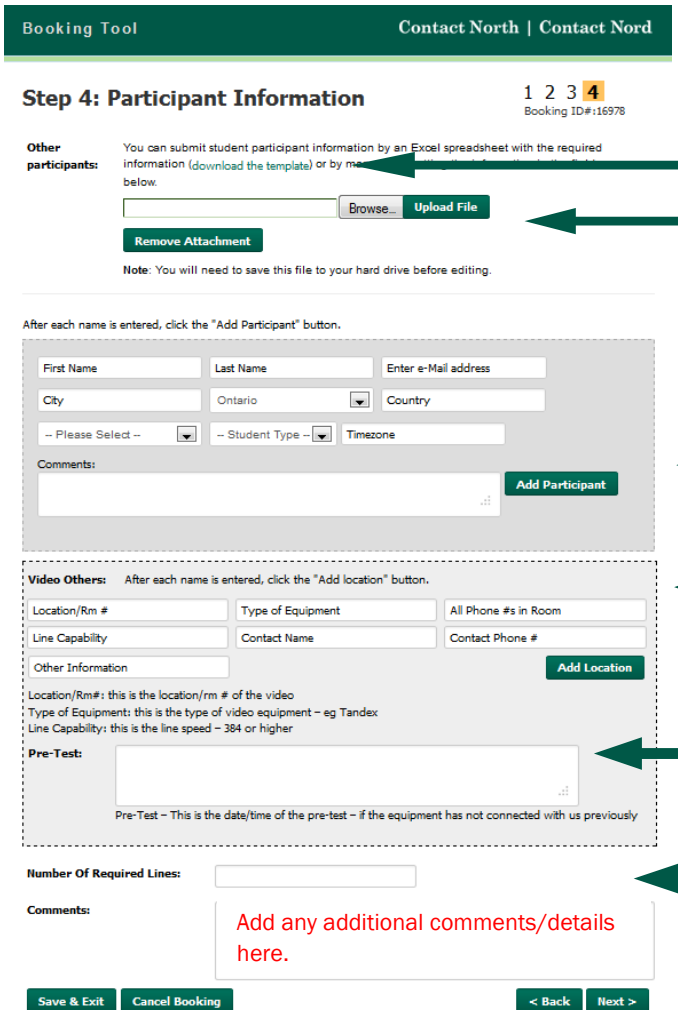
The meeting dates you selected can be edited/removed from here.

Book any of our centres by clicking on the "+" symbol.

You can edit dates and times for specific centres, here.

Field Name	Instructions
Online Learning Centres	Select a centre on the left by clicking on the "+" symbol next to it. To remove them from the right column, click on the "-" symbol next to it.
Edit Dates and Times by Centre	You can edit dates and times for the centres you selected.

Step 4: Participant Information



Download our participant list template here. (see Appendix 1)

Find and upload your saved participant list from here. See instructions, below.

Participants can also be entered, one at a time, by filing in the details and clicking "Add Student"

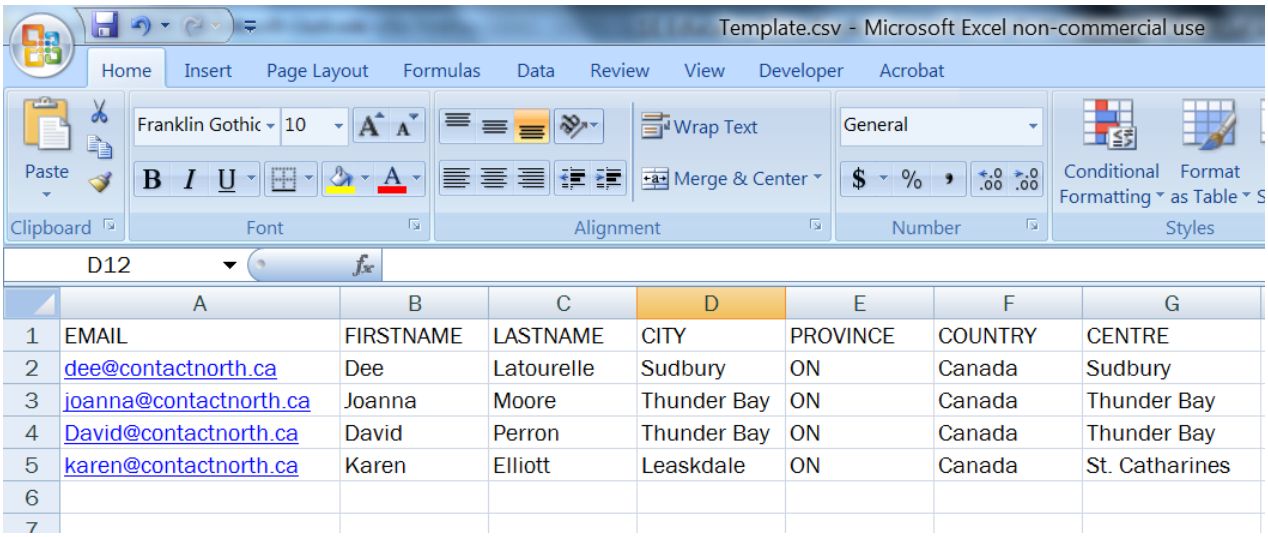
Add contact and technical details for alternate locations here (other than at an Online learning Centre.

DO NOT COMPLETE FOR INTERNAL PURPOSES ONLY

Enter number of participants who will join by audio only

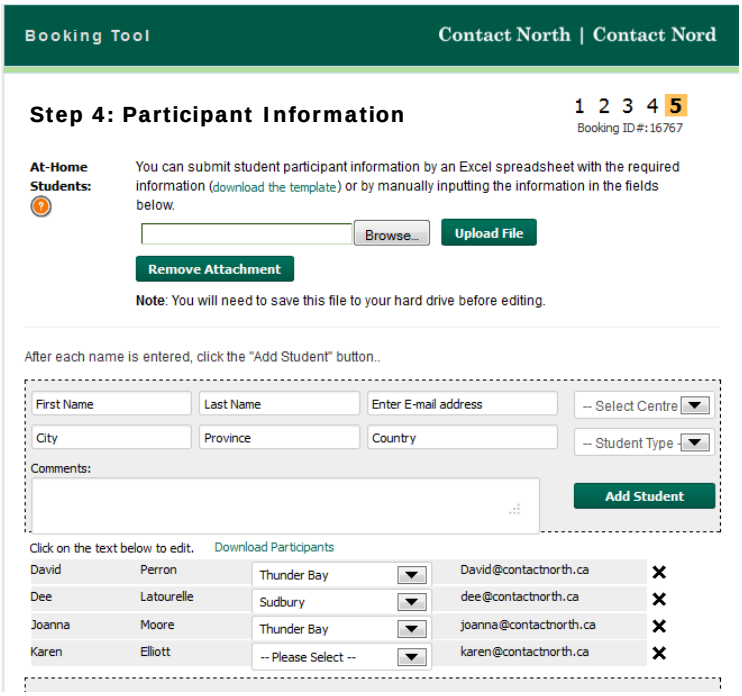
Field Name	Instructions (see Appendix 1 for sample upload)
"download the template"	Click on this link to download a C.S.V. (Comma Separated Value) template. This will open in Excel, so that you can create a list for upload rather than entering names one at a time. 1. Name your file and save it (remember where you save it; you'll need it again soon) 2. Open it to fill it in. 3. Save your changes. 4. Click on "Browse" to find the file 5. Click on "Upload File" to populate your list on this form.

Appendix 1: Participant template



	A	B	C	D	E	F	G
1	EMAIL	FIRSTNAME	LASTNAME	CITY	PROVINCE	COUNTRY	CENTRE
2	dee@contactnorth.ca	Dee	Latourelle	Sudbury	ON	Canada	Sudbury
3	joanna@contactnorth.ca	Joanna	Moore	Thunder Bay	ON	Canada	Thunder Bay
4	David@contactnorth.ca	David	Perron	Thunder Bay	ON	Canada	Thunder Bay
5	karen@contactnorth.ca	Karen	Elliott	Leaskdale	ON	Canada	St. Catharines
6							

Once you upload this completed template, here's what you'll see:



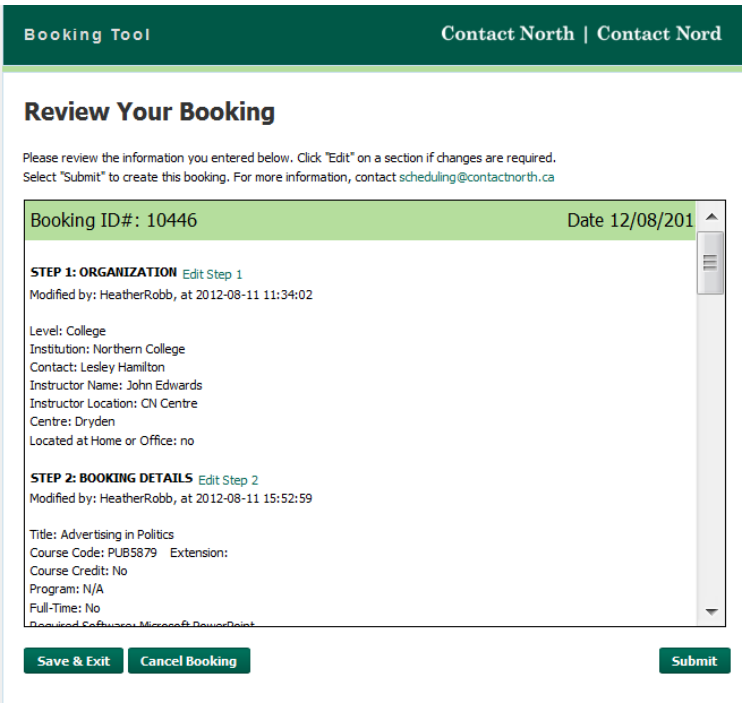
Here's the list of names that were uploaded, using the template provided.

Once your selections are made, you have four options:

- Click "Next" to continue
- Click "Back" to go back one page
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Review Your Booking

You can now review the information you provided.



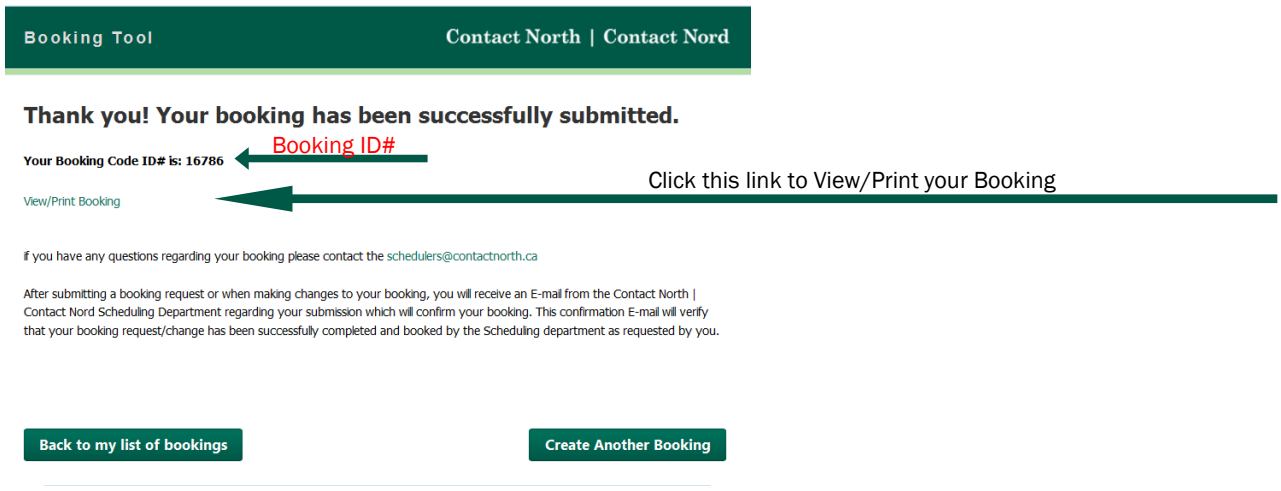
You can scroll through this page to look at what you entered at each step of the process. If changes are required, you can click on the green "Edit Step#" links, provided at the top of each step.

Once your selections are made, you have three options:

- Click "Submit" to send your request to Contact North |Contact Nord schedulers
- Click "Save & Exit" to submit at a later time
- Click "Cancel Booking" to cancel this booking process

Now that you're created your booking, you will find it listed in your "My Bookings" page when you login to the Booking Tool. To access a booking on the list, click on the Booking ID number.

Booking Confirmation

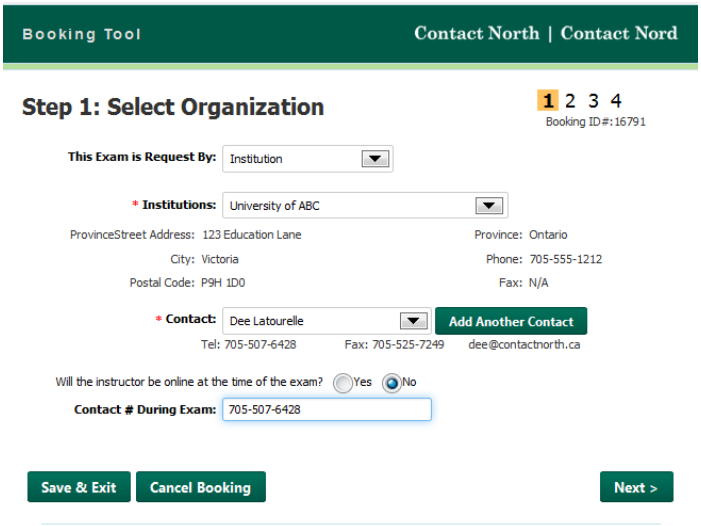


Once you click “Submit”, you will get this confirmation screen. From here you can go back to your list of bookings, create another booking or view/print the booking details.

To exit, close the browser window.

Section D: Booking Type - Exam

Step 1: Select Organization



*Fields marked by an * are required fields and you won't be able to proceed to the next step until they are filled

Field Name	Instructions
Requested by	Who is making this request?
Institution/Agency/Student	Select or enter Institution/Agency/Student name.
Contact	Select the contact responsible for this exam.. *If the desired Contact is not in the list, you can add him/her by clicking the "Add Another Contact" button (see the next page to learn how to add a contact).
Contact # During Exam	Enter the phone number that the contact can be reached at during the exam.

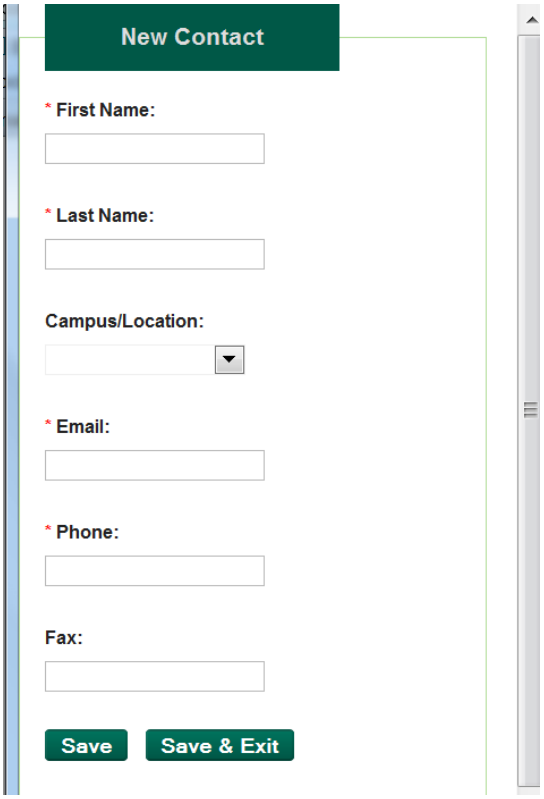
Once your selections are made, you have three options:

- Click "Next" to continue
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Adding a Contact

1. Click on the "Add Another Contact" button.

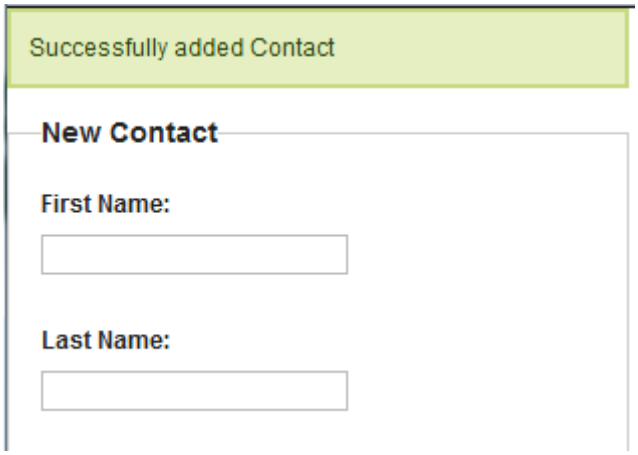
2. A new window will open.
Fill out the form the resulting form. A detailed list of fields is available on the next page.



3. Click on the "Save" button at the bottom of the form.

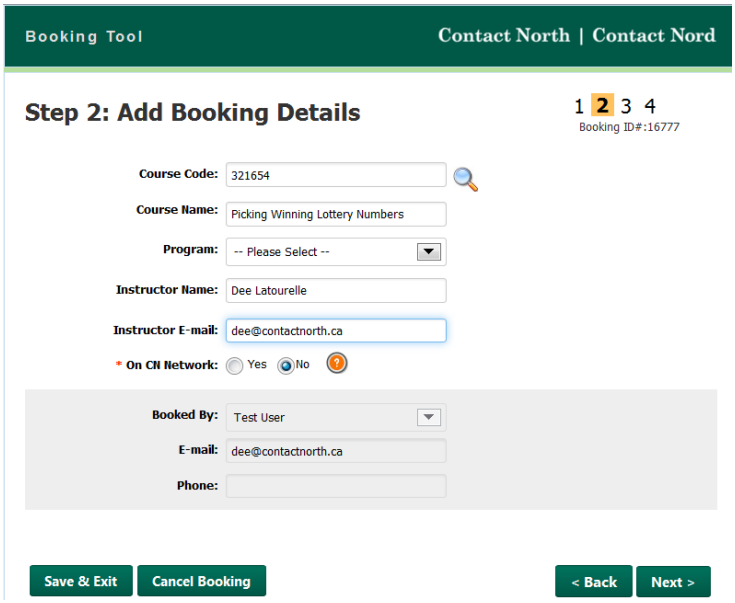
4. You will receive confirmation that the entry has been added.

5. Click on the "Save & Exit" link to return to the booking. (Do NOT X out to close the window or your contacts will not be saved.



Field Name	Instructions
Save	When all information is entered, click on "Save" or your changes will be lost.
Save & Exit	Click on "Save & Exit" to close this window.

Step 2: Add Booking Details



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Once the fields are completed, you have four options:

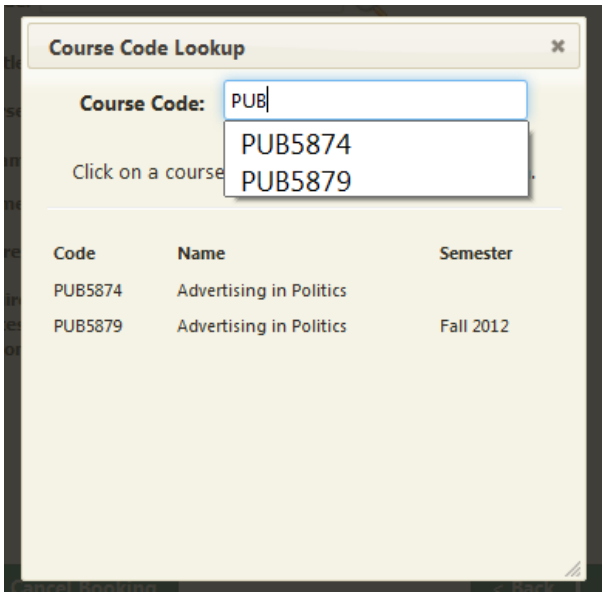
- Click "Next" to continue
- Click "Back" to go back one page
- Click "Save & Exit" to continue at a later time
- Click "Cancel Booking" to cancel this booking process

Field Name	Instructions
Course Code	Enter the course code for the exam being booked.
Course Name	Enter the course name.
Instructor Name	Enter the name of the person providing instruction for this course
Instructor e-Mail	Enter e-mail address for instructor
On the CN Network	Indicate if this exam is for a course that has already been booked using one of Contact North's three platforms of delivery (audioconference, videoconference, web-conference)

Searching for a Course Code

1. In Step 2, click on the magnifying glass icon next to the course.

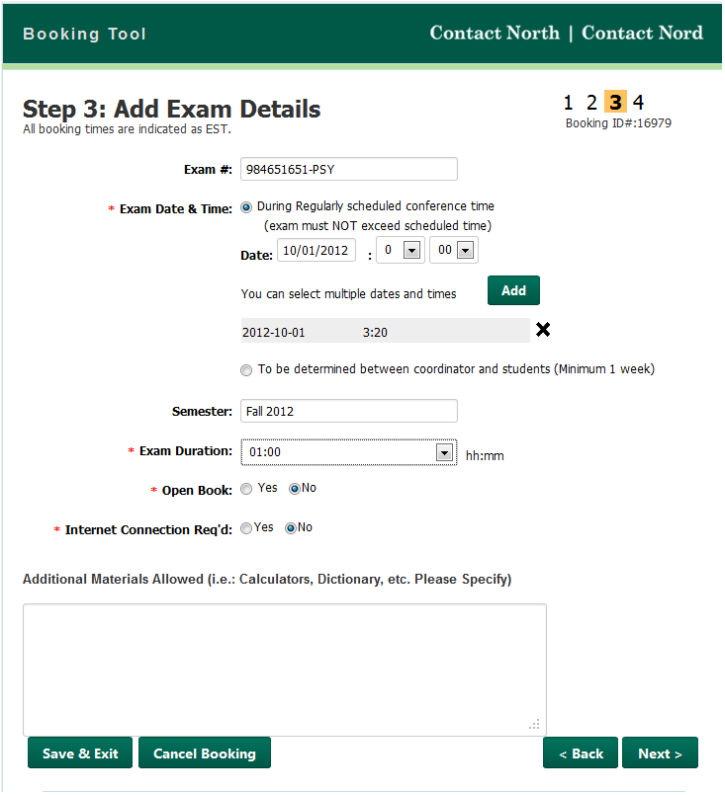
2. A new window will open. Begin typing in the Course Code. Results will appear as you type. Stop typing once the desired Course is displayed in the list.



3. Click the Course Code of the desired course.

4. The Course Code Lookup window will disappear. You will be returned to the booking form. The selected Course's information will have been filled out. You can now continue the process and this will create a new booking for the course.

Step 3: Add Exam Details



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Field Name	Instructions
Exam #	Enter the exam reference # if applicable
Exam Date and Time	Enter date and time details.
Semester	Enter semester that the exam is being booked.
Exam Duration	Select appropriate duration time for this exam.
Open Book	Are books/notes permitted during exam?
Internet Connection	Is a connection to the internet required for this exam?
Additional Details	Include any special notes or instructions here.

Once the fields are completed, you have four options:

- Click "Next" to continue
- Click "Back" to go back one page
- Click "Save & Exit" to continue at a later time
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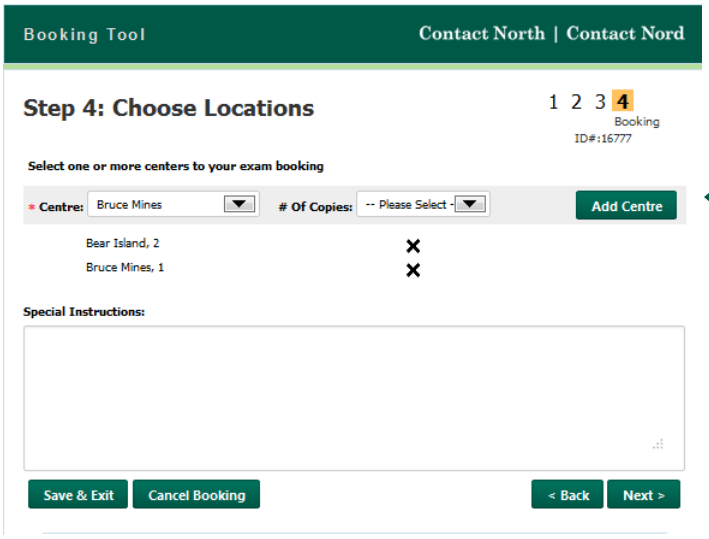
Step 4: Choose Locations



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Select Centre and # of exam copies required for that centre and then click on "Add Centre" to save the details. To add more centres, repeat this process.

Once your selections are made, you have four options:

- Click "Next" to continue
- Click "Back" to go back one page
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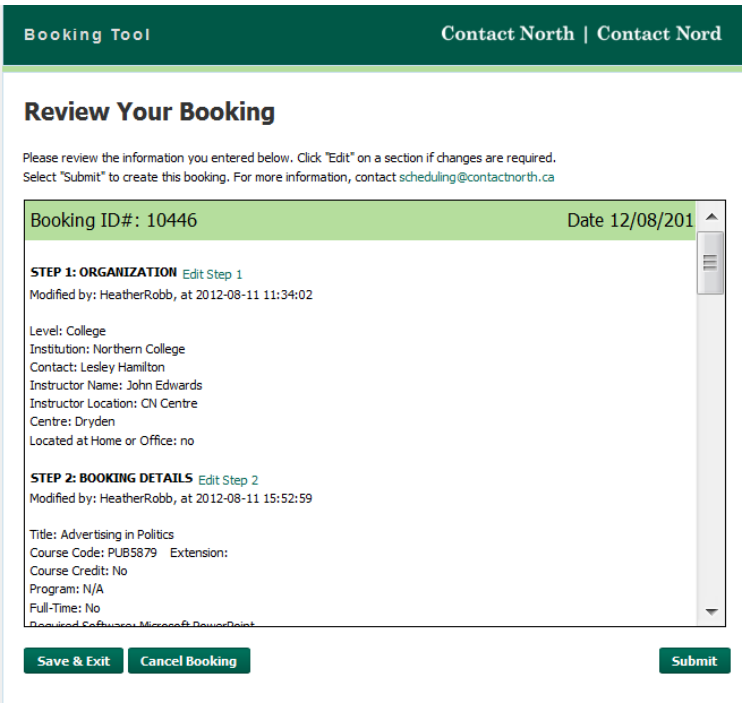
Review Your Booking

You can now review the information you provided.



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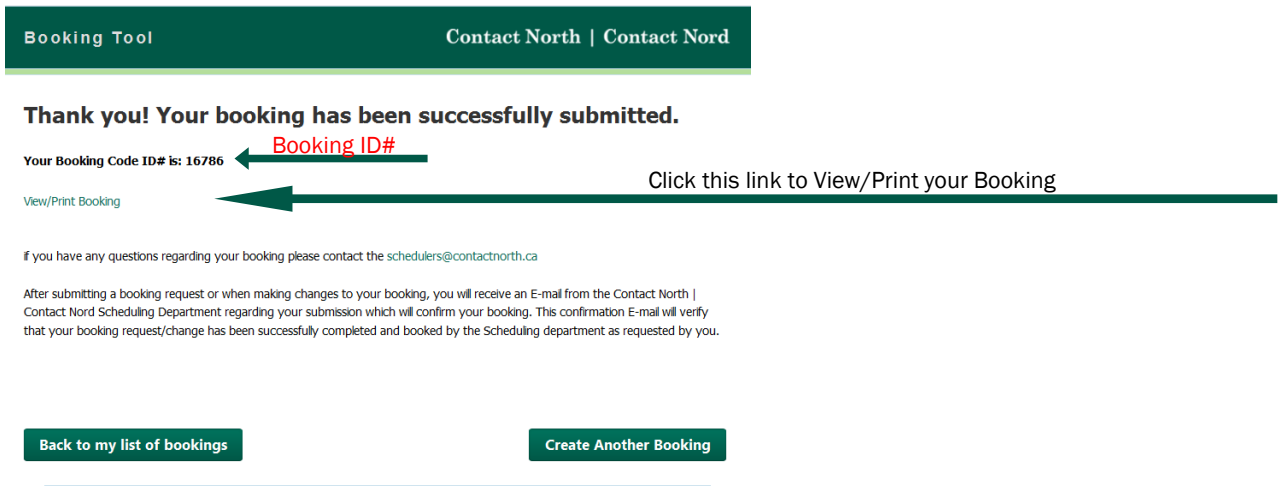
Booking Confirmation



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To exit, close the browser window.