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

e-Channel Partners

Contents

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.

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- View list of saved and submitted bookings

Create Booking
- Select Type:
- Classes
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- Review entered data
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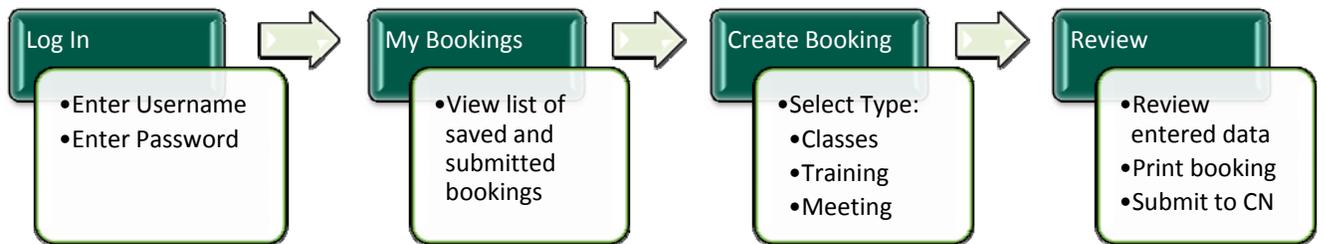
Throughout the Booking process, you will find ( ) this icon. It is for information purposes and will provide definitions for the terms used in the form.

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 and would like one, send your request to schedulers@contactnorth.ca.

If you cannot login, contact the helpline at 705-507-6428 or email crm@contactnorth.ca. Someone will contact you within 24 business hours.

Creating and/or Updating your Account/Password

User Registration

Fields with * are required.

First Name *

Last Name *

Job Title

Phone

Business Phone *

Fax

Street Address

City

Province
-Select Province-

Postal Code

Institution
-Select Institution-

Username *
Username is automatically generated from the first 2 letters of your first name and full last name.

Email *

Password *

Confirm Password *

Password Reset: Question *

Password Reset: Answer *

Verification Code *

yiftyaz Get a new code

Please enter the letters as they are shown in the image above.
Letters are not case-sensitive.

Register

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

Instructions:

- Fill in as many details as you can (remember that anything marked with an * is a required field and you will not be able to proceed until those are completed).
- Type in the verification code at the bottom.
- Click on the REGISTER button to complete the process.
- Once you have submitted your registration, someone from Contact North will contact you to activate your account. Someone will contact you 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.

Select the type of booking you wish to create.

Once you have selected the Type of Booking, click on the "Create Booking" button on the bottom right.

Types of Booking

a.	**Classes:**	Literacy programs or courses offered by MTCU designated literacy stream lead organizations
b.	**Training:**	Training sessions for practitioners or learners offered by Ontario literacy organizations
c.	**Meeting:**	Meeting request(s) by an Ontario literacy organization

Section A: Booking Type - Class

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	Your organization's name is located here.
Contact	Select the contact at the institution responsible for this Class.
	*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).
Cultural Stream	Select the primary cultural group targeted.

Once your selections are made, you have three options:

- Click "Next" to continue
- Click "Save & Exit" to save the booking and continue at a later time
- Click "Cancel Booking" to cancel this booking process – the booking will not be saved.

Adding a Contact

1. Click on the "Add Another Contact" button (where available).

* Contact: `-- Please Select --` ▼ **Add Another Contact**

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 "Submit" button at the bottom of the form.

4. You will receive confirmation that the entry has been

5. Click on the "Close Window" link to return to the booking.

New Contact

First Name:

Last Name:

Campus/Location:

▼

Email:

Phone:

Fax:

Submit   Close Window

Successfully added Contact

New Contact

First Name:

Last Name:

Field Name	Description
Submit	When all information is entered, click on "Submit" or your changes will be lost.
Close Window	Click on this link 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

The information in the gray box is populated by your profile, or the profile of the person who created this booking.

Field Name	Instructions
Session Name	You can type in the name of your session or select an existing session from the drop down, provided.
Session Leader	Enter the name of the person who will lead this session.
e-Mail	Enter the e-mail address used to contact the session leader.
Phone	Enter the number used to reach the session leader during the session.

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 3: Choose Status and Delivery

Field Name	Instructions
Delivery Method	Select from the drop down, whether the session is online live or online anytime.
Additional Options	Select details about whether content needs to be uploaded and if the session is public.
Registration Type	Check this box if the session can be accessed anytime.
Description	Enter a brief description of what the session will be about
No Description	Check this box if you don't currently have a description

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

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 class start date
End Date	Enter class end date
Days	If course is online live, select the days for each class.
Times	For each day you selected, enter a start time and end time. Times are in 24 hour format (military 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/Edits Dates and Times

You can ADD more dates and times here

You can EDIT more dates and times here

Select centre(s) by clicking the + symbol next to them and remove them by clicking the – symbol in the right column..

Select locations to edit dates and times for locations already selected.

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

Step 5: Participant Information

Add co-presenters here

Download list template (instructions below)

Find and upload completed list, here.

Remove list from here.

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

You can add comments or special notes here if you have any.

Field Name	Instructions
Co-Presenters	Enter co-presenter details and click on "Add Presenter" if you need to add more than one.
Participants	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. 2. Open it to fill it in (see Appendix 1). 3. Save your changes. 4. Click on "Browse" to find the file 5. Click on "Upload File" to populate your list on this form. 6. You can add individual participants in shaded box.
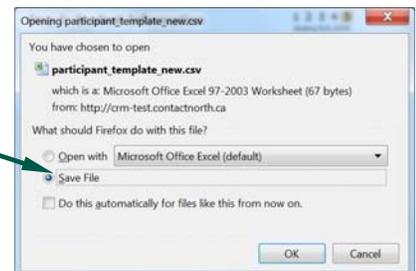
Appendix 1: Participant template

Full names are required for each participant.

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

Booking Tool   **Contact North | Contact Nord**

Thank you! Your booking has been successfully submitted.

The booking ID provided is the one to reference in any queries to Schedulers at Contact North.

Your Booking Code ID# is: 16786 ← Booking ID#

Click this link to View/Print your Booking

View/Print Booking

If you have any questions regarding your booking please contact the schedulers@contactnorth.ca

After submitting a booking request or when making changes to your booking, you will receive an E-mail from the Contact North | Contact Nord Scheduling Department regarding your submission which will confirm your booking. This confirmation E-mail will verify that your booking request/change has been successfully completed and booked by the Scheduling department as requested by you.

Back to my list of bookings   **Create Another Booking**

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	Your organization's name is locatted listed, here.
Contact	Select the contact at the institution responsible for this Training Session. *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).
Trainer Name	Type in name of person leading this training session.
Trainer e-Mail	Include trainer's e-mail address
Trainer Location	1. For Trainer 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 type in TBD.

Once your selections are made, you have three options:

- Click "Next" to continue
- Click "Save & Exit" to save the booking and continue at a later time
- Click "Cancel Booking" to cancel this booking process – the booking will not be saved.

Adding a Contact

6. Click on the "Add Another Contact" button (where available).

* Contact: -- Please Select -- ▾ **Add Another Contact**

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

8. Click on the "Submit" button at the bottom of the form.

9. You will receive confirmation that the entry has been

10. Click on the "Close Window" link to return to the booking.

New Contact

First Name:

Last Name:

Campus/Location:
▾

Email:

Phone:

Fax:

Submit   Close Window

Successfully added Contact

New Contact

First Name:

Last Name:

Field Name	Description
Submit	When all information is entered, click on "Submit" or your changes will be lost.
Close Window	Click on this link 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
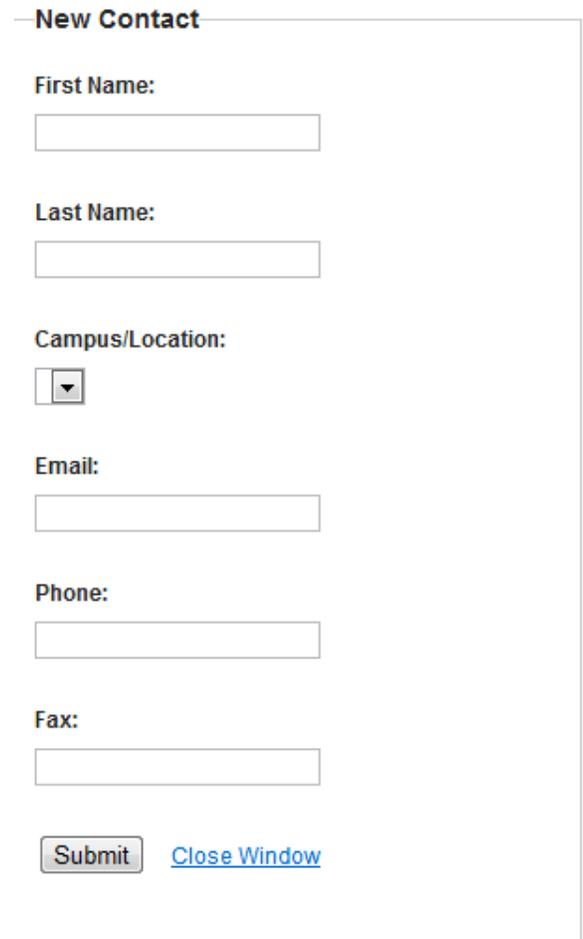
Field Name	Instructions
Name of Training Session	Type in the name of the training session, here.
Required Software	If software is required for this session, add details here.
Delivery Method	How is this training delivered? Select from the drop down list.
To be Recorded?	Would you like a recording of this training session?
Target Group	Select the primary cultural group, targeted for this training.
Training Description	Include a brief description of this training session
No Description	If no description is available, check this box.

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 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 class start date
End Date	Enter class end date
Days	If course is online live, select the days for each class.
Times	For each day you selected, enter a start time and end time. Times are in 24 hour format (military 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/Edits Dates and Times

You can ADD more dates and times here

You can EDIT more dates and times here

Select centre(s) by clicking the + symbol next to them and remove them by clicking the – symbol in the right column..

Select locations to edit dates and times for locations already selected.

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

Step 4: Participant Information

Download list template (instructions, below)

Find and upload completed list, here. (see Sample File)

Remove list from here.

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

You can add comments or special notes here if you have any.

Field Name	Instructions
Other Participants	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. 7. Name your file and save it. 8. Open it to fill it in. 9. Save your changes. 10. Click on "Browse" to find the file 11. Click on "Upload File" to populate your list on this form. 12. You can also add participant details, individually in the shaded box

Sample File: Participant template

Full names are required for each participant.

Participant Details

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

Booking Tool   **Contact North | Contact Nord**

Thank you! Your booking has been successfully submitted.

Your Booking Code ID# is: 16786 — Booking ID#

View/Print Booking

The booking ID provided is the one to reference in any queries to Schedulers at Contact North.

Click this link to View/Print your Booking

If you have any questions regarding your booking please contact the schedulers@contactnorth.ca

After submitting a booking request or when making changes to your booking, you will receive an E-mail from the Contact North | Contact Nord Scheduling Department regarding your submission which will confirm your booking. This confirmation E-mail will verify that your booking request/change has been successfully completed and booked by the Scheduling department as requested by you.

Back to my list of bookings   **Create Another Booking**

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	Your organization's name is located here.
Contact	Select the contact at the institution responsible for this Meeting. *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).
Chairperson	Type in name of person leading this meeting.
Chairperson e-Mail	Include Chairperson's e-mail address
Chairperson 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 type in TBD.
Co-Chairperson	Add co-chairperson details here then click "Add Co-Chairperson" button

Once your selections are made, you have three options:

- Click "Next" to continue
- Click "Save & Exit" to save the booking and continue at a later time
- Click "Cancel Booking" to cancel this booking process – the booking will not be saved.

Adding a Contact

11. Click on the "Add Another Contact" button (where available).

* **Contact:** -- Please Select -- ▾   **Add Another Contact**

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

13. Click on the "Submit" button at the bottom of the form.

14. You will receive confirmation that the entry has been

15. Click on the "Close Window" link to return to the booking.

New Contact

First Name:

Last Name:

Campus/Location:
▾

Email:

Phone:

Fax:

Submit   Close Window

Successfully added Contact

New Contact

First Name:

Last Name:

Field Name	Description
Submit	When all information is entered, click on "Submit" or your changes will be lost.
Close Window	Click on this link 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

Field Name	Instructions
Meeting Title	Type in the title of the meeting, here.
Equipment Required	Select from available options
To be Recorded?	Would you like a recording of this training session?
Meeting Description	Include a brief description for this meeting.
No Description	If no description is available, check this box.

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 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 class start date
End Date	Enter class end date
Days	If course is online live, select the days for each class.
Times	For each day you selected, enter a start time and end time. Times are in 24 hour format (military 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/Edits Dates and Times

You can ADD more dates and times here

You can EDIT more dates and times here

Select centre(s) by clicking the + symbol next to them and remove them by clicking the – symbol in the right column..

Select locations to edit dates and times for locations already selected.

Once your selections are made, you have four options:

- Click "Next" to continue
- Click "Back" to go back one page
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Step 4: Participant Information

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Remove list from here.

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

You can add comments or special notes here if you have any.

Field Name	Instructions
Other Participants	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. 13. Name your file and save it. 14. Open it to fill it in. 15. Save your changes. 16. Click on "Browse" to find the file 17. Click on "Upload File" to populate your list on this form. 18. You can also add participant details, individually in the shaded box

Sample File: Participant template

Full names are required for each participant.

Participant Details

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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.

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Booking Confirmation

Booking Tool   **Contact North | Contact Nord**

Thank you! Your booking has been successfully submitted.

Your Booking Code ID# is: 16786 ◄── Booking ID#

View/Print Booking ◄── Click this link to View/Print your Booking

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Back to my list of bookings   **Create Another Booking**

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