
Central Classroom Booking

Presenter: Molly Ching (FEO)



Central Classroom Booking

- Agenda



Introduction

Workflow

Reports for Department
Review

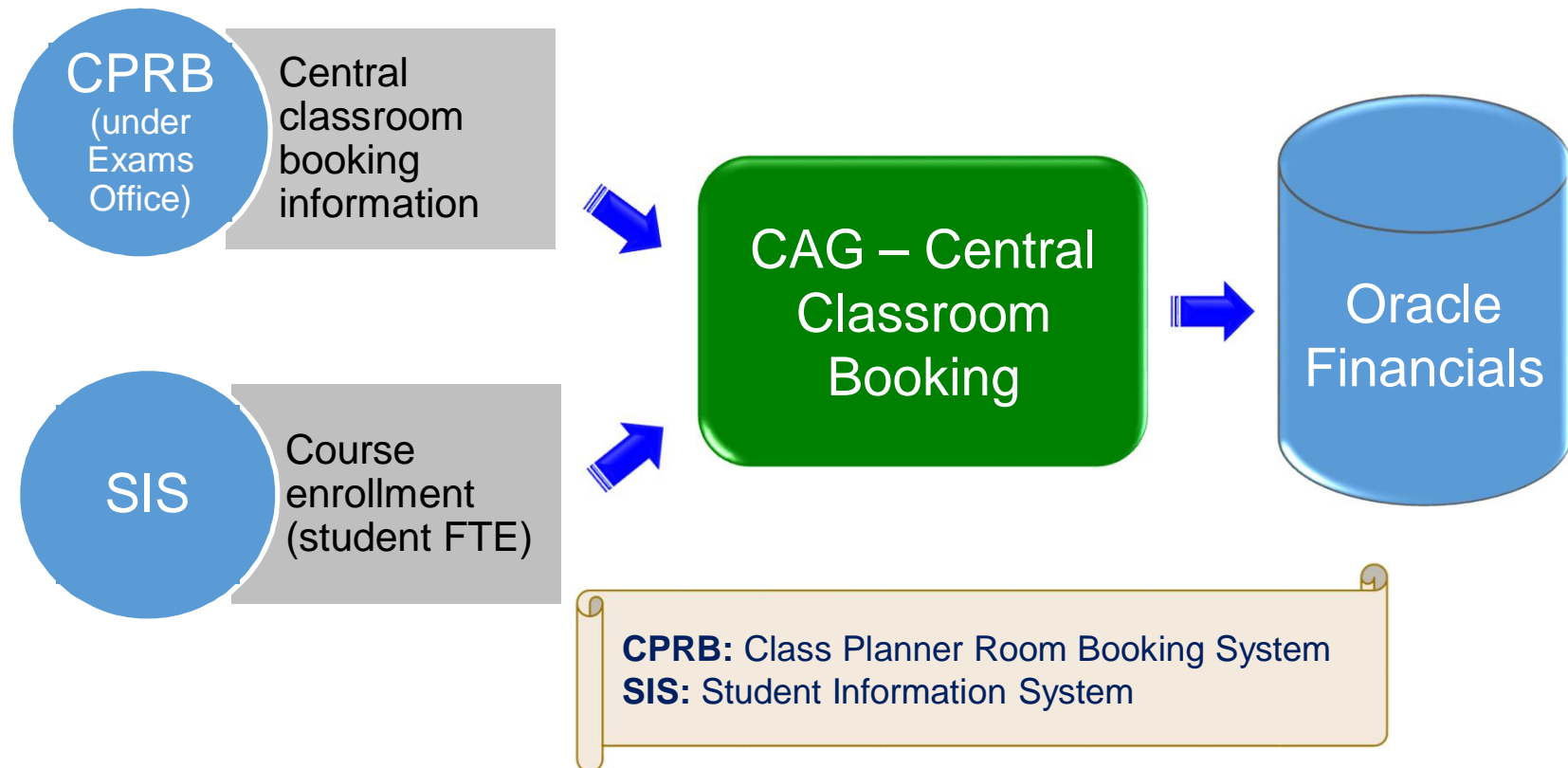
System Demo by ITS



Central Classroom Booking

- Introduction

- An online system integrating with other systems to capture all central classroom booking information



Central Classroom Booking

- Introduction of CPRB System

- In CPRB, Departments are required to report booking details and define activity types



(Preloaded Teaching Courses Information)

- ✓ Name of Department
 - Contact Person
 - Telephone Number / Email
- ✓ Name of Event / Activity
- ✓ Date & Time of Booking
- ✓ Venue Requirement
 - Size / Seating Capacity
 - AV / IT equipment (e.g. Panopto, Visualizer)
 - Furniture Setting (e.g. movable chairs, lecture theatre)

UGC –
Teaching/
Research/
OIA

**Non-UGC –
Teaching**
(with
Charging
Code)

**Non-UGC –
OIA (with
Charging
Code)**

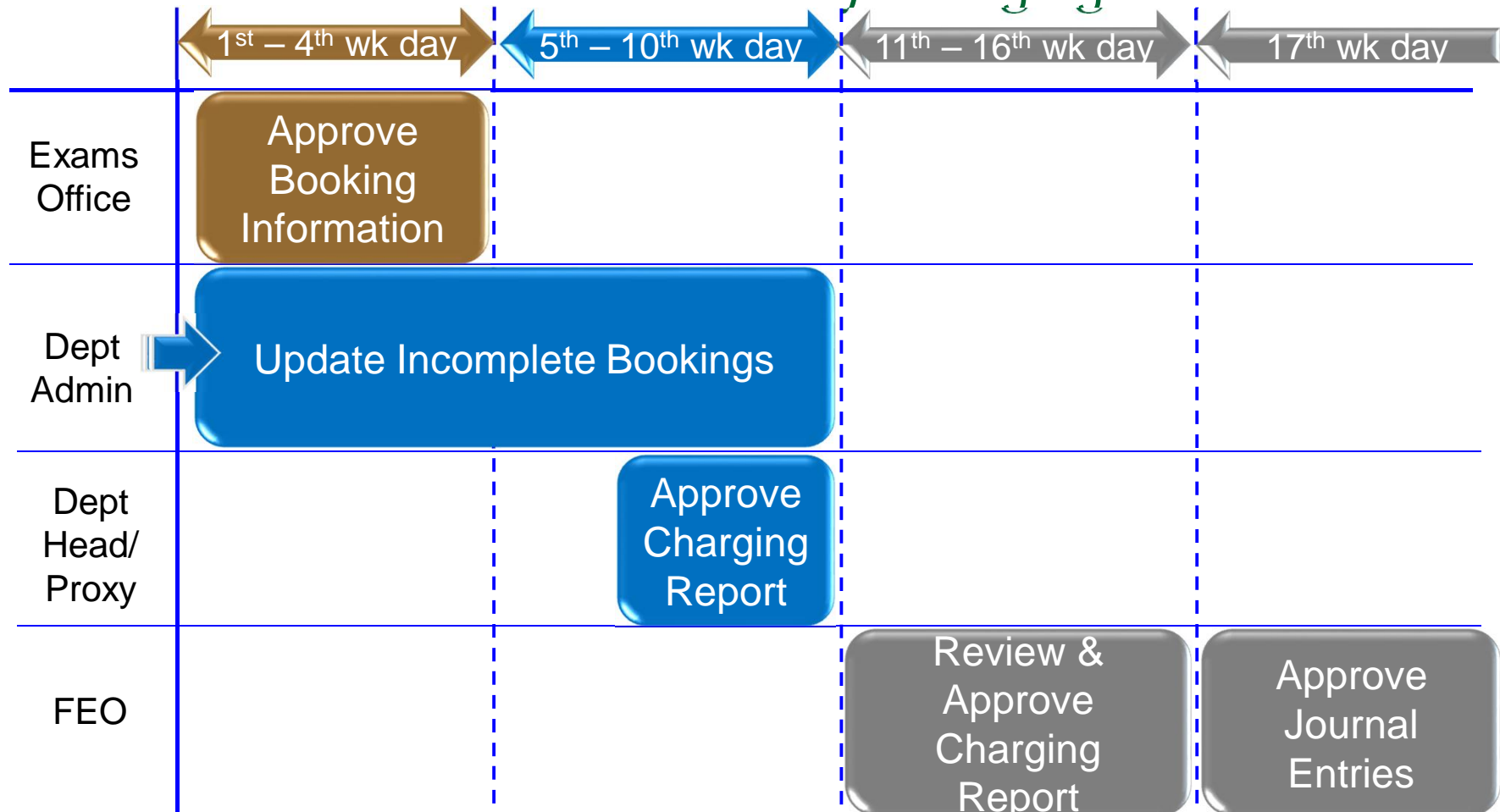
**Non-UGC –
Research**
(with
Charging
Code)

Non-UGC
Activities
Charged to
Departments



Central Classroom Booking

- Workflow Overview of Monthly Charging



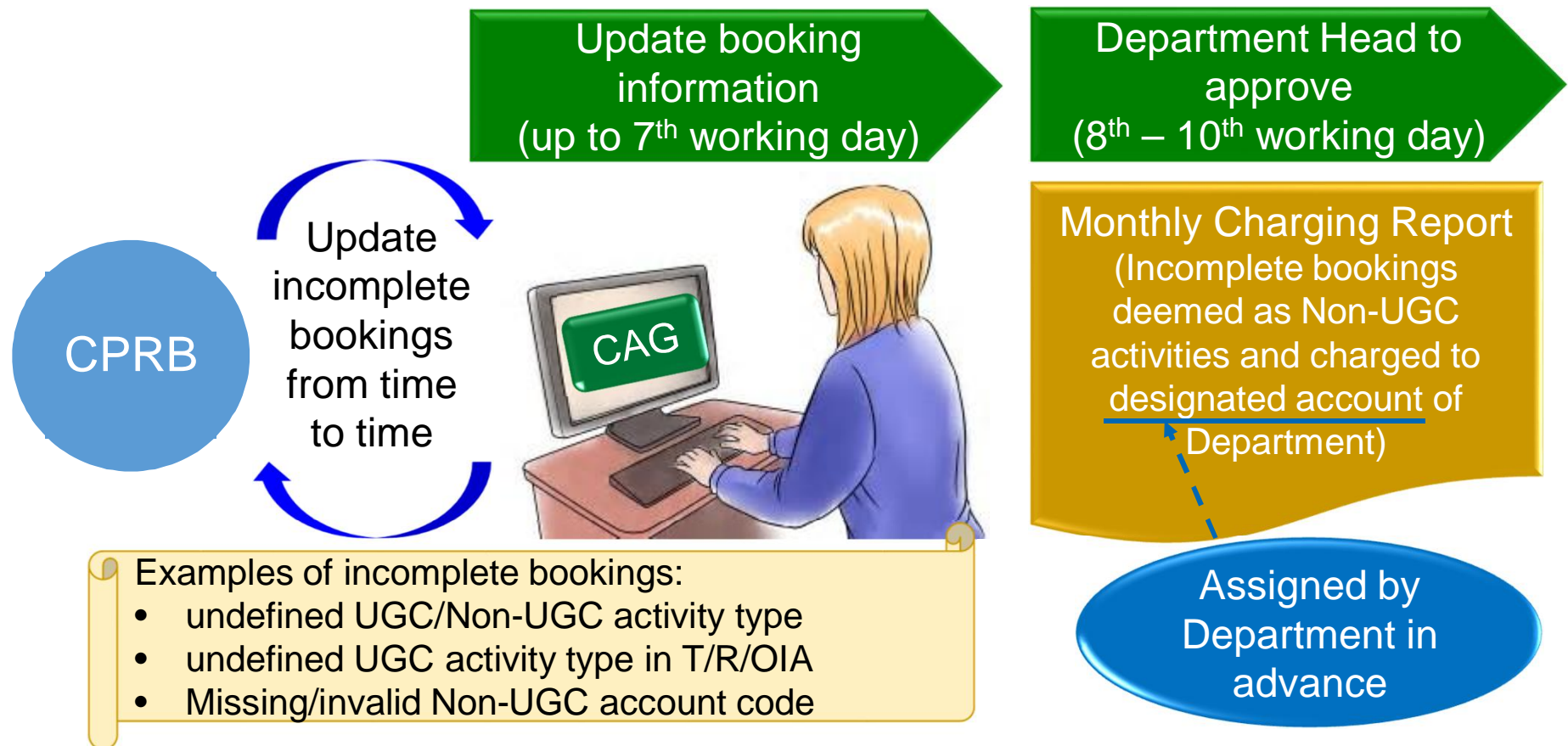
Note: The periods in the above timeline refer to the number of workings days following the end of the charging month



Central Classroom Booking

- Workflow for Department Administrator

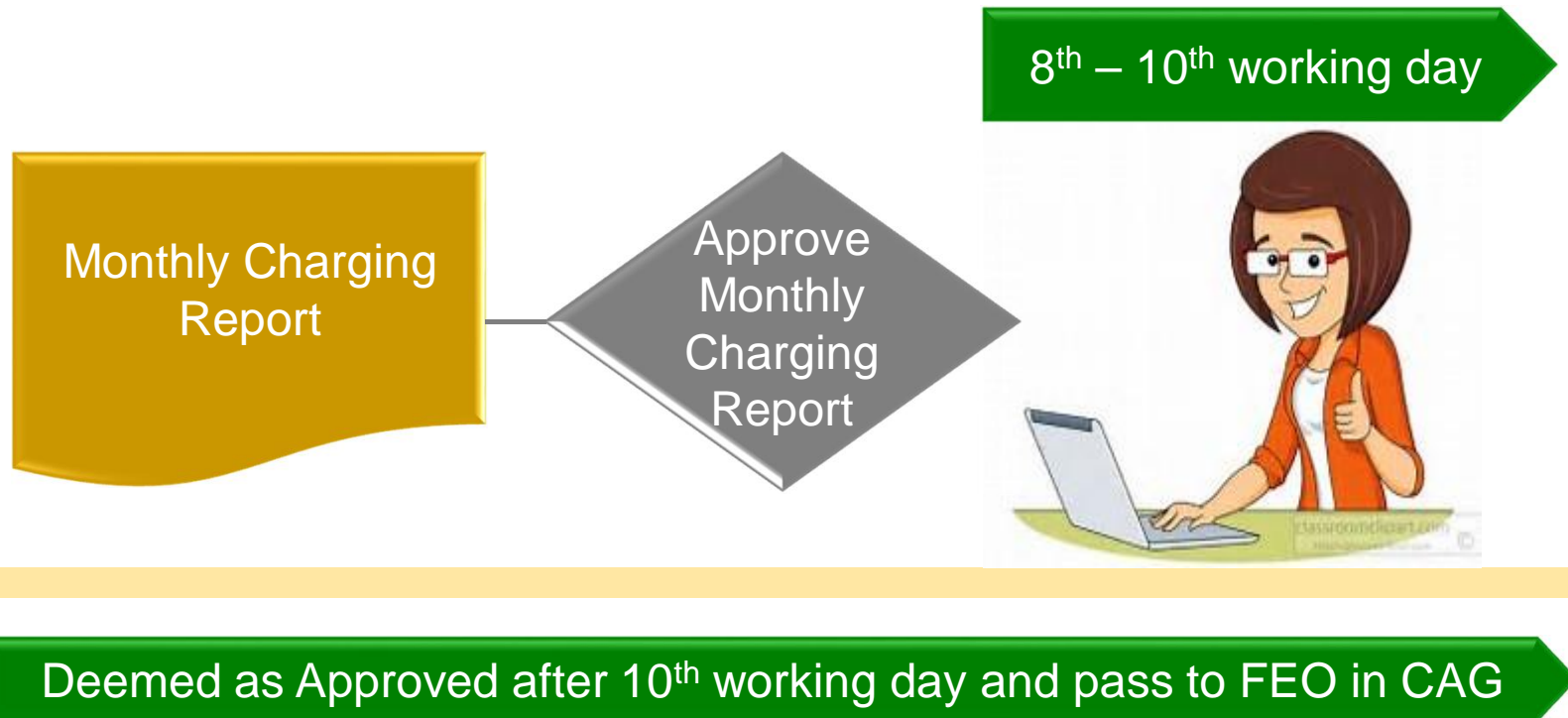
- Right to update booking information in CAG



Central Classroom Booking

- Workflow for Department Head / Proxy

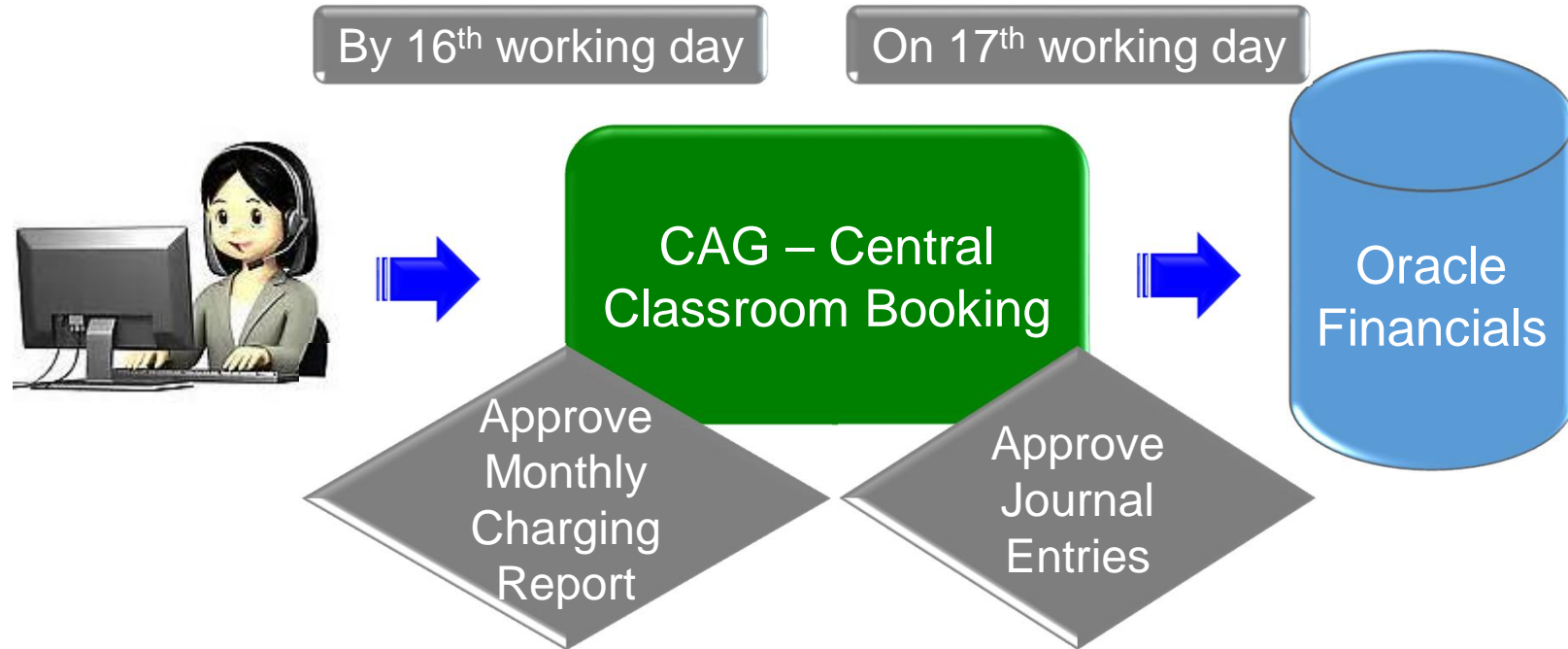
- Right to update and approve in CAG
- Department Administrator can still update booking information before Department Head / Proxy approves the monthly charging report



Central Classroom Booking

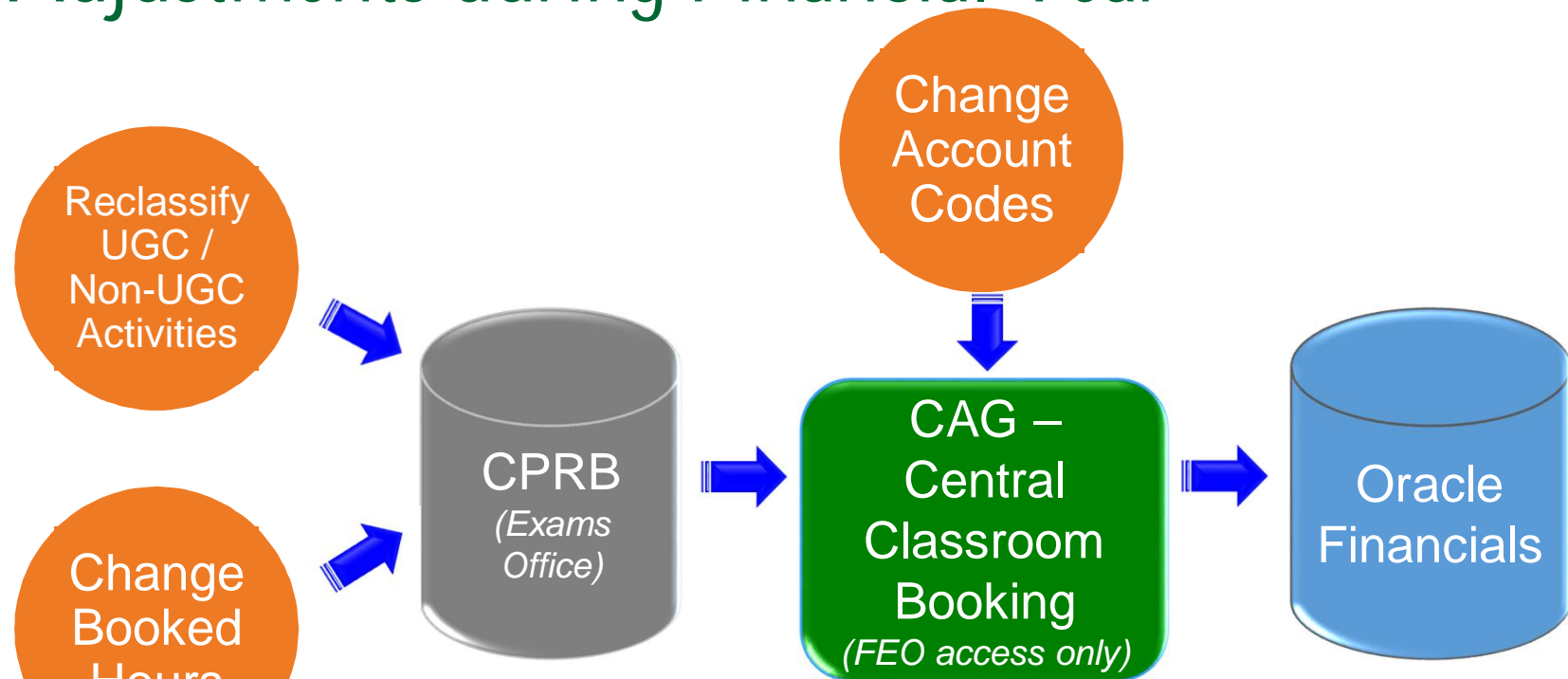
- Workflow for FEO

- Follow up booking information with Departments
- Approve monthly charging report and journal entries in CAG



Central Classroom Booking

- Adjustments during Financial Year



- All systems will be synchronized after adjustment
- Email alert to Department after adjustment
- Adjustments are effected in the journal-posting month
- Separately shown in the past charging and booking summary reports of relevant charging month

Central Classroom Booking

- Email Alerts to Departments

	Date of Sending	Email Description	Department Administrator	Department Head / Proxy
1	End of last day of charging month	Email alert to complete missing information in CAG	Ü	Ü
2	End of 6 th working day	Reminder to complete missing information by 7 th working day	Ü	Ü
3	Beginning of 8 th working day	Email alert to approve monthly charging report by 10 th working day		Ü
4	Beginning of 10 th working day	Reminder to approve monthly charging report by 10 working day		Ü
5	After FEO put through adjustments	Email alert of adjustment		Ü
6	After Dept Head assigns / removes rights of department administrator or proxy	Email alert of assignment or removal of rights	Ü	Ü



Central Classroom Booking

- Reports for Department Review

Past Monthly Charging Report

- Past 12 months charging details
- Subsequent adjustments, if any

Monthly Booking Summary

- Past 12 months summary of activities split into T/R/OIA for both UGC / Non-UGC
- Subsequent adjustments, if any



Central Classroom Booking (Demo)

Presenter: Wong Wai Ching (ITS)



Demo of CAG Central Classroom Booking

- n 1. Roles
- n 2. Workflow



CAG Central Classroom Booking – Roles

Users	Update Booking Information	Exception Report without Designated Account	View Monthly Booking Summary	View past charging reports	Approve Charging Report	Assign/remove Department Administrators
Department Administrator	ü	ü	ü	ü		
Proxy	ü	ü	ü	ü	ü	
Department Head	ü	ü	ü	ü	ü	ü
Faculty Dean		ü	ü			



CAG Central Classroom Booking – Workflow

Assign department administrators and proxies

n Initial setup

- q Departments provide the list of administrators and proxies to ITS to load to the system



CAG Central Classroom Booking – Workflow

Assign/Remove Department Administrators and Proxies (User Functions/Menu)

- ▼ **Department Head**
 - ▼ Monthly Reports
 - Exception Report without Designated Accounts
 - Past Exception Report without Designated Accounts
 - Approve Monthly Charging Report
 - View Past Monthly Charging Report
 - View Monthly Booking Summary
 - ▼ Booking Information
 - Update Booking Information
 - ▼ Department Administrator
 - Assign/Remove Department Administrators and Proxies



CAG Central Classroom Booking - Workflow

Assign/Remove Department Administrators and Proxies (Dept Head Only)

Assign/Remove Department Administrators and Proxies [Cost Allocation Guidelines](#)

Assign/Remove Department Administrators and Proxies

List of administrators assigned, Department

Staff	Valid from (DD/MM/YYYY)	Valid to (DD/MM/YYYY)	Dept Admin	Proxy	Add Admin/Proxy
NG <input type="text"/>	<input type="text" value="18/01/2017"/>	<input type="text" value="20/12/2017"/>	<input checked="" type="radio"/>	<input type="radio"/>	
YIP <input type="text"/>	<input type="text" value="29/06/2017"/>	<input type="text" value="30/11/2017"/>	<input type="radio"/>	<input checked="" type="radio"/>	

Note: Department Administrator has the rights to update CAG central classroom bookings and Proxy has both the rights to update bookings and approve charging report.



CAG Central Classroom Booking – Workflow

Update CAG Booking Information

- n Update CAG central classroom bookings for
 - q Bookings with incomplete information
 - n UGC or Non-UGC activity not defined
 - n UGC activity not defined teaching, research or other institutional activity
 - n Non-UGC activity without account information
 - q Non-UGC bookings with accounts



CAG Central Classroom Booking – Workflow

Update CAG Booking Information (User Functions/Menu)

▼ Department Administration

▼ Booking Information

- Update Booking Information

▼ Monthly Reports

- Exception Report without Designated Accounts
- Past Exception Report without Designated Accounts
- Approve Monthly Charging Report
- View Past Monthly Charging Report
- View Monthly Booking Summary

▼ Department Head

▼ Monthly Reports

- Exception Report without Designated Accounts
- Past Exception Report without Designated Accounts
- Approve Monthly Charging Report
- View Past Monthly Charging Report
- View Monthly Booking Summary

▼ Booking Information

- Update Booking Information

▼ Department Administrator

- Assign/Remove Department Administrators and Proxies

Proxy inherit the functions of Department Head (except assign admin/proxy)

Department Head only



CAG Central Classroom Booking – Workflow

Update CAG Booking Information
- Booking with incomplete information

- n Select all or some boxes, and click 

Update Booking Information

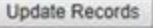
Cost Allocation Guidelines

Department: Centre
Filter: Current Charging Month

Booking Records with Missing Information

Only records missing a UGC/Non-UGC status, missing a UGC activity type, with an invalid account code or without any account code for a non-UGC activity are displayed here. Account codes are required for Non-UGC records. Please click [HERE](#) for instructions to update missing information

<input type="checkbox"/> Select All	Room	Dates (dd/mm/yyyy)	Booked Hours	Event Title	UGC/Non-UGC Activity	Account Code	Dept. References (Max 20 characters)	Contact Info
<input type="checkbox"/>	CPD-	02/05/2017	12.0					
<input type="checkbox"/>	CPD-	02/06/2017	12.0	CBS_Event #14	Please Select			
<input type="checkbox"/>	CPD-	02/07/2017	12.0					
<input type="checkbox"/>	CY-	02/05/2017	1.0	CBS_Event#02	Please Select			
<input type="checkbox"/>	CY-	04/05/2017	1.0					
<input type="checkbox"/>	CY-	12/05/2017	5.0					
<input type="checkbox"/>	CY-	14/07/2017	5.0	CBS_Event#09	Please Select			
<input type="checkbox"/>	CY-	16/06/2017	5.0					
<input type="checkbox"/>	CPD-	10/05/2017	5.0	CBS_Event#07	Non-UGC	14005		reference (optional)
<input type="checkbox"/>	CPD-	11/05/2017	5.0					
<input type="checkbox"/>	L	02/05/2017	12.0	CBS_Event #13	Non-UGC	14005		reference (optional)
<input type="checkbox"/>	CY	02/05/2017	1.0	CBS_Event #05	Non-UGC	14005		reference (optional)
<input type="checkbox"/>	CY	04/05/2017	1.0					

☐ Select All  (Note: This only updates "Booking Records with Missing Information" table.)

Booking records without activity type defined

Non-UGC activity without account information

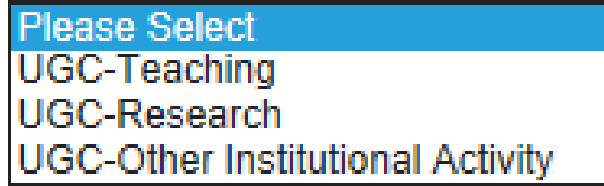


CAG Central Classroom Booking – Workflow

Update CAG Booking Information (cont.)

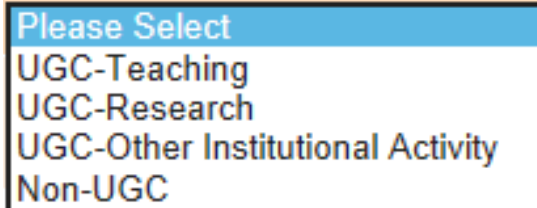
- Booking with incomplete information (cont.)

- n UGC booking – to define the UGC activity type



A screenshot of a dropdown menu with a blue header "Please Select". The menu is open, showing three options: "UGC-Teaching", "UGC-Research", and "UGC-Other Institutional Activity".

- n Booking records without activity type defined – to define the activity type



A screenshot of a dropdown menu with a blue header "Please Select". The menu is open, showing four options: "UGC-Teaching", "UGC-Research", "UGC-Other Institutional Activity", and "Non-UGC".

- n Non-UGC booking – to input non-UGC account code

q  function to support replication of account code



A screenshot of a form for inputting a non-UGC account code. It features a series of input fields separated by dots. The first field contains the number "14005". The last field is followed by a "Copy" button.

CAG Central Classroom Booking – Workflow

Update CAG Booking Information (cont.)

- Non-UGC booking with accounts

- n Select all or some boxes, and click 

Non-UGC Booking Information(completed)

Non-UGC bookings for the current month are displayed here.
You may update booking account codes and departmental references.
Please click [HERE](#) for instructions to update the account code.

<input type="checkbox"/> Select All	Room	Dates (dd/mm/yyyy)	Booked Hours	Event Title	Account Code	Dept. References (Max 20 characters)	Contact Info
<input type="checkbox"/>	CY	02/05/2017	1.0	CBS_Event #03	14008 · <input type="text"/> · <input type="text"/> · <input type="text"/> · 400 · 01 <input type="button" value="Copy"/>	Reference (optional) <input type="text"/>	Chan <input type="text"/> @hku.hk
	CY	04/05/2017	1.0				333
<input type="checkbox"/>	CY	05/05/2017	6.0	CBS_Event #08	14008 · <input type="text"/> · <input type="text"/> · <input type="text"/> · 400 · 01 <input type="button" value="Copy"/>	Reference (optional) <input type="text"/>	Chan <input type="text"/> @hku.hk
	CY	09/06/2017	6.0				333
	CY	07/07/2017	6.0				
<input type="checkbox"/>	CY	15/05/2017	5.0	CBS_Event #10	14008 · <input type="text"/> · <input type="text"/> · <input type="text"/> · 400 · 01 <input type="button" value="Copy"/>	Reference (optional) <input type="text"/>	Chan <input type="text"/> @hku.hk
	CY	16/05/2017	5.0				333

☐ Select All (Note: This only updates "Non-UGC Booking Information" table.)



CAG Central Classroom Booking – Workflow

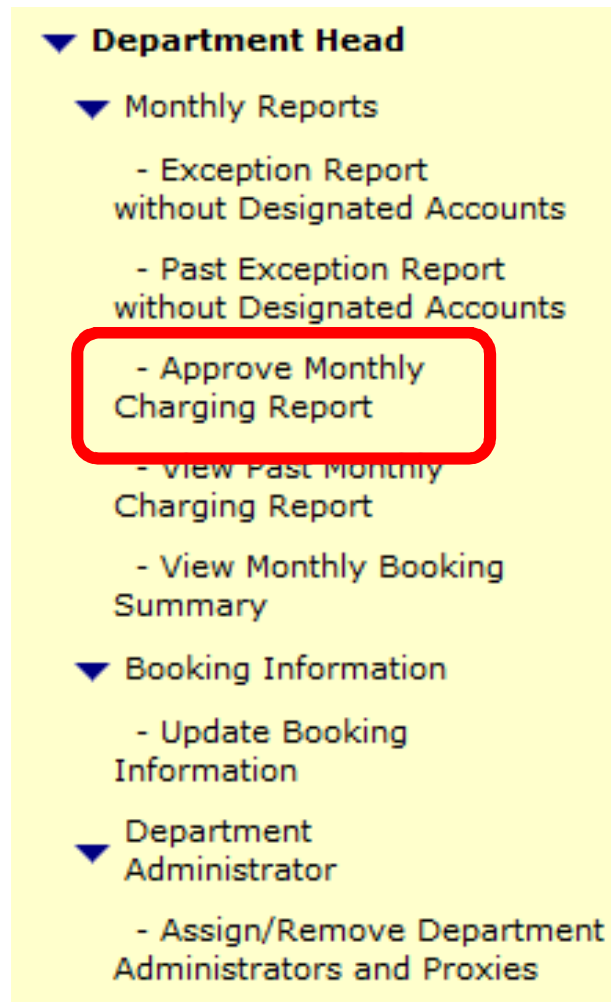
Approve monthly charging report

- n Charging report generated on 8th working day of the month; to be reviewed by dept head or proxy
- n Approve charging report on non-UGC bookings during 8th to 10th working day of the month



CAG Central Classroom Booking – Workflow

Approve Monthly Charging Report (User Functions/ Menu)



CAG Central Classroom Booking – Workflow

Approve Monthly Charging Report

Click  to approve the monthly charging report

Approve Monthly Charging Report

[Cost Allocation Guidelines](#)

Year: 2017
 Month: May
 Department: Centre
 Contact Person: Fung
 Contact e-mail: @hku.hk
 Approved by EO: Approved
 Approved by department: In Progress
 Approved by FEO: Not Finalized

Save as Excel

Save as PDF

Summary by Charging Account Code

OF Charging Account Code	Total Charge by Account Code (HK\$)
14005.400.01	64,410
14005.400.01	655,300
Grand total:	719,710

Charge Details

OF Charging Account Code	Date (dd/mm/yyyy)	Start Time	End Time	Booked Time in Hrs (Rounded up to 1 decimal place)	Room #	Hourly Rate (HK\$)	Nominal Charge (HK\$)	Waiver %	Actual Charge in HK\$ (Rounded up to the nearest dollar)	Event Title
14005.400.01	02/05/2017	08:00	20:00	12.0	CPD-	1,760	21,120	0	21,120	CBS_Event #14
	02/05/2017	08:00	20:00	12.0	L	2,285	27,420	0	27,420	CBS_Event #13
	02/05/2017	13:00	14:00	1.0	CY	1,760	1,760	0	1,760	CBS_Event #05
	04/05/2017	13:00	14:00	1.0	CY	1,760	1,760	0	1,760	CBS_Event #05
	10/05/2017	09:00	14:00	5.0	CPD-	355	1,775	0	1,775	CBS_Event#07
	11/05/2017	09:00	14:00	5.0	CPD-	355	1,775	0	1,775	CBS_Event#07
	12/05/2017	09:00	14:00	5.0	CY	1,760	8,800	0	8,800	CBS_Event#09
	Subtotal by Account Code:			41.0					64,410	



CAG Central Classroom Booking – Workflow

Approve Monthly Charging Report (cont.)

	24/05/2017	08:00	20:00	12.0	LE		2,285	27,420	0	27,420	CBS_Event #12
	27/05/2017	08:00	20:00	12.0	LE		2,285	27,420	0	27,420	CBS_Event #12
	28/05/2017	08:00	20:00	12.0	LE		2,285	27,420	0	27,420	CBS_Event #12
	29/05/2017	08:00	20:00	12.0	LE		2,285	27,420	0	27,420	CBS_Event #12
	30/05/2017	08:00	20:00	12.0	LE		2,285	27,420	0	27,420	CBS_Event #12
	31/05/2017	08:00	20:00	12.0	LE		2,285	27,420	0	27,420	CBS_Event #12
Subtotal by Account Code:				306.0						655,300	
				Grand total:	347.0					719,710	

Course Allocation Information

Date (dd/mm/yyyy)	Start Time	End Time	Booked Time in Hrs (Rounded up to next hr)	Allocated booked hours by student FTE		Room #	Course Code
				UGC	Non-UGC		
				Hrs	Department	Hrs	Department
04/05/2017	08:00	22:00	14			0.1	Dept
04/05/2017	08:00	22:00	14	13.9	Faculty		
11/05/2017	08:00	22:00	14			0.1	Dept
11/05/2017	08:00	22:00	14	13.9	Faculty		

Click [HIDE](#) to hide information on UGC bookings.

UGC Teaching Information

Date (dd/mm/yyyy)	Start Time	End Time	Booked Time in Hrs (Rounded up to next hr)	Room #	Event Title
02/05/2017	12:00	13:00	1	CPD-	EDU_Event #04
04/05/2017	12:00	13:00	1	CPD-	EDU_Event #04

UGC Research Information

Date (dd/mm/yyyy)	Start Time	End Time	Booked Time in Hrs (Rounded up to next hr)	Room #	Event Title
02/05/2017	12:00	13:00	1	CPD-	EDU_Event #04
04/05/2017	12:00	13:00	1	CPD-	EDU_Event #04

UGC Other Institutional Activities Information

Date (dd/mm/yyyy)	Start Time	End Time	Booked Time in Hrs (Rounded up to next hr)	Room #	Event Title
02/05/2017	10:00	11:00	1	CPD-	EDU_Event #02



Approve Monthly Charges

Q&A

<https://www.cag.hku.hk>



Thank You

