



## Quick Start Guide to UCISA Connect

### Creating an Account

The first time you logon onto UCISA Connect, you will need to create a new account. The portal has multi-factor authentication set-up, so please ensure that you have an authenticator app, such Microsoft Authenticator to ready as part of the sign-up process. To create an account:

1. Click on the Sign up now link

UCISA

Sign in with your email address

Please enter your Email Address

Email Address

Password

[Forgot your password?](#)

Sign in

Don't have an account? [Sign up now](#)

2. Enter your organisational email address.
3. Click the Send verification code button.
4. A six-figure verification code will be sent to your email address.
5. Enter the verification code.
6. Once verified, enter a new password minimum of 8 characters and must contain:
  - a. Lowercase letter
  - b. Uppercase letter
  - c. 1 Digit
  - d. 1 symbol
7. Scan the QR presented on screen with your authentication app, to set-up multifactor authentication.
8. Once authenticated, you will be taken through to the portal landing page.



## Checking My Details

1. Click on the My Details tile to check that your personal details are correct.
2. You can edit your details next to the relevant field.
3. Click **Update** to confirm the changes made.

## Booking on UCISA Events

1. UCISA Events can be found by clicking on the Member Events tile
2. You can use the filter options to narrow down the types of events that you wish to see.
3. To book onto a particular event, click **View**.
4. Details of the event will be presented, to book a place on the event, click **Book** and the follow the instructions to complete the booking process.
5. If you wish to pay by invoice, please select **Bill to my organisation** on the Billing Address page.
6. To be emailed a quotation, please click on the **Email Quotation** button on the Summary Page.
7. If you have Purchase Order Number and Purchase Order ready you can upload these on the Summary Page. Alternatively, you can upload a Purchase Order via the **Pay Invoices** tile later.
8. Once your booking is confirmed you will receive a confirmation email with details of your booking.

## Returning to Pay for Events – Uploading Purchase Orders

1. If you have booked an event and are paying later by purchase order, you can view and pay any outstanding invoices through the **Pay Invoices** tile.
2. Select the relevant event you wish to pay for.
3. You will be presented with the details of the amount due. You can choose to:
  - a. Pay Invoice to pay by credit or debit card.
  - b. Upload **Purchase Order** to pay via purchase order
  - c. Request an invoice be sent through.
4. Select the relevant payment option and follow the instructions.

## Viewing Booked Events

1. Click on the **My Event Bookings** tile.



2. You will see two sets of bookings.
  - a. Bookings for events that you have personally booked.
  - b. Bookings for events that you are attending that you have booked or someone else has booked for you.
3. If you wish to change any of the details for a booking you have made, click **Manage**.
4. If you need to cancel a booking, please click **Request Cancellation**. Please note that cancellations can only be made ahead of the final cancellation date. After this date you may ask for someone else to attend in your place.
5. Please select the name of the person who's booking is being cancelled. You will be asked to provide a reason for your cancellation.
6. If you wish change something about your booking, please select **Request Changes** and complete the form with relevant details.
7. You will be notified by the UCISA Events team regarding any cancellations or changes to bookings.

## Accessing UCISA Resources

1. Click on the **Resources tile** to view the current resources available within the portal. Please note that not all resources are available to all members through the portal.
2. You can search for resources using either the Search function or the Categories drop-down menu.
3. Click on the **View Resource** link.

## Getting Further Help

1. Please look at the FAQs on the [Portal Information web page](#).
2. Submit your enquiry via the Enquiries link on the top menu of the portal.
3. If your enquiry is urgent or you are having problems logging into the portal, please contact [admin@ucisa.ac.uk](mailto:admin@ucisa.ac.uk) if you need further assistance with using the portal.