

**Job Aid: Creating Scheduled Offerings****Course: Scheduling Management**

Lab 1: Add New Scheduled Offering

Lab 2: Assigning Resources to Segments

Lab 4: Adding Segments to a Scheduled Offering

Lab 10: Copy a Scheduled Offering

**Description**

The purpose of this job aid is to guide administrators through the step-by-step process of creating and editing a Scheduled Offering. Related terminology is provided.

**Tasks**

- A. Create Scheduled Offering
- B. Add Additional Segments
- C. Add Additional Resources
- D. Copy Scheduled Offering
- E. Edit Scheduled Offering Notifications

**Terminology:**

**Scheduled Offering:** A Scheduled Offering is an Item or activity scheduled for delivery on a specific date and time.

**Segment:** Unit of division of an Item offering based on duration that facilitates variable resource scheduling.

## Task A. Create Scheduled Offering

*Note: Verify the Admin tab is selected.*

- 1 Navigate to **Learning > Scheduled Offerings**.
- 2 Click the **Add New** link.  
The Scheduled Offering wizard displays.

- 3 Select the **Item** type option.
- 4 Use the **search icon** (🔍) to search for and select an Item.
- 5 Enter a description of the Scheduled Offering.
- 6 Specify or select the appropriate **Domain**.
- 7 Select whether to publish the Scheduled Offering in all associated catalogs.
- 8 Select a start date, start time, and time zone.
- 9 Click **Preview** to view the basic information for the offering.

**10** Enter a facility in the **Facility** field or search for one.

**11** If applicable, select the other resources associated with the Scheduled Offering: location, instructor, and equipment.

*Note: Alerts are displayed if there are any resource conflicts. Depending on the Item configuration, an alert may also display if the selected instructor is not authorized to teach the Item.*

**12** Click **Save**.

If there are any warnings, the Warning Details screen displays. Click **Yes** to continue.

The Scheduled Offering record displays allowing you to make further configurations.

**Task B. Add Additional Segments**

List View

**1** Click **Segments** from the Related area.

*Note: If necessary, click List View.*

**2** Click the **Copy Segments** icon (📄).

Description	Primary Location	Primary Instructor	Actions	Remove
Fri 11/11/2011 08:30 AM - 02:30 PM The Basics of Budgeting	New York Classroom 01	Jeffrey D Adams	Attendance	<input type="checkbox"/>

**3** Enter the number of times to copy the segment.

**4** Click **Copy**.

**Copy Daily Segments**

The schedule times listed below will be copied and appended to the end of this scheduled offering.

**Scheduled Offering:** The Basics of Budgeting (4056)

Segment	Schedule Times	Location	Instructor
The Basics of Budgeting	11/11/2011 08:30	New York Classroom	Jeffrey Adams

\*Number of Times to Copy:  **3**

**4** **Copy** **Cancel**

## Task C. Add Additional Resources

- 1 Search for and access in edit mode a Scheduled Offering record.
- 2 Select the **Segments** tab from the Related area.
- 3 Click the segment link for the segment you wish to add resources.

- 4 For the selected segment, select a primary instructor.
- 4 Click the **Add Resources** drop-down menu.
- 5 Select **Add Instructor**.  
*Note: you may need to complete a set of search criteria to find the appropriate instructor.*

- 6 Click the corresponding checkbox to select the instructor to add for the segment.
- 7 Click **Add**.

Instructor ID	Instructor Name	Related User	Availability
JEDADAMS	Adams, Jeffrey D		Available for Entire Scheduled Offering <input checked="" type="checkbox"/>
LUDALMEIDA	Almeida, Luana D		Available for Entire Scheduled Offering <input type="checkbox"/>
APDAMADOR	Amador, April D		Available for Entire Scheduled Offering <input type="checkbox"/>

- 8 Identify the primary instructor and click the corresponding radio button in the **Primary** column.
- 9 Click **Apply to All Segments** at the segment level to copy the new resources to all segments of the Scheduled Offering.
- 10 Click **Save and Close**.

### Edit Segment

**\*Required**

\*Start Date: 12/27/2012 \*Start Time: 09:00 AM

\*End Date: 12/27/2012 \*End Time: 12:00 PM

\*Time Zone: Eastern Standard Time (America/New York)

Description: TEST FOR UAT AM

Resources  **9**

Type & Title	Primary	Remove
Location		
CLASS - New York Classroom 01	<input type="radio"/>	<input type="checkbox"/>
Instructor		
Jeffrey D Adams	<b>8</b> <input type="radio"/>	<input type="checkbox"/>

**10**

### Task D. Copy Scheduled Offering

- 1 Search for and access in edit mode a Scheduled Offering record.
- 2 Click **Copy** in the Actions area.

Home Learners Performance Learning Content Commerce System Admin

Search: Enter Keywords or Command

Search Results

TEST PREPERATION COURSE 57815

Description:

Item: COURSE NSSC-TST-01 (Rev 9/14/2011 0...	Use Time Zone of this Offering: Yes
*Source of Training:	Registration Cut-off Time Zone:
Published Price: 0.00 US Dollar (USD) (Default)	POC:
PO Number:	Email confirmation to the Super...: Yes
Email confirmation to the Learn...: Yes	Email confirmation to the Instru...: No
Email confirmation to the Conta...: No	*Email:
*Direct Cost Code:	
Comments:	

Related  Segments

Registration Catalogs	Description	Primary Location	Primary Instructor	Actions	Remove
Segments	Thu 12/27/2012			Attendance	<input type="checkbox"/>
	09:00 AM - 12:00 PM TEST FOR UAT AM				
	Fri 12/28/2012			Attendance	<input type="checkbox"/>
	01:00 PM - 05:00 PM TEST FOR UAT PM				

**2**



<p><b>8</b> Confirm copy results.</p> <p><b>9</b> Click Copy.</p>	
<p><b>10</b> Once the copies are created, you can access them with the links on the final screen.</p> <p><b>11</b> Click OK.</p>	

## Task E. Edit Scheduled Offering Notifications

- 1 Search for and access in edit mode a Scheduled Offering record.
- 2 Click **More** from the Related area.

1

2

TEST PREPARATION COURSE 57815

Description:

Item:	COURSE NSSC-TST-01 (Rev 9/14/2011 0...	Use Time Zone of this Offering:	Yes
*Source of Training:		Registration Cut-off Time Zone:	
Published Price:	0.00 US Dollar (USD) (Default)	POC:	
PO Number:		Email confirmation to the Super...	Yes
Email confirmation to the Learn...	Yes	Email confirmation to the Instru...	No
Email confirmation to the Conta...	No	*Email:	
*Direct Cost Code:			

Comments:

2

Related: More Registration Add Learners: [+] Settings Advanced

Registration Non-enrolled Waitlisted (1) Enrolled (25) Total (No Limit) Slots (0)

Filter Sort By: Registration Filter for Enrolled Learner

- 3 Select the **Notifications** tab of the Scheduled Offering.

TEST PREPARATION COURSE (57815) - Related

Notifications

3

Contacts

Materials

**Notifications**

Cost Calculation

Cost Summary

Pricing

Chargeback

Edit the Scheduled Offering  
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

Edit the Scheduled Offering Cancellation Notification for the Scheduled Offering

Preview Apply Changes Reset

Learner: <label key="notification.ScheduleCancellation.StudentSubje

Supervisor: <label key="notification.ScheduleCancellation.SupervisorSi

Instructor: <label key="notification.ScheduleCancellation.InstructorSul

Other: <label key="notification.ScheduleCancellation.OthersSubje

Body: <html><head><title>SATERN Scheduled Offering Cancellation Notification</title></head><body bgcolor="#ffffff" link="#336699" alink="#cccccc" vlink="#666699"><table width=750 border=1 cellspacing=0 cellpadding=4 valign="middle" align="center">

Preview Apply Changes Reset

- 4 Scroll down to view the notification you wish to edit.

*Note: You may edit the notifications sent by the following triggers:*

- Offering Cancellation
- Learner Registration
- Learner Withdraw
- Learner Waitlist
- Learner Waitlist Removal
- Learner Pending Status

- 5 Click **Preview** to view the notification.

Notifications

4

Edit the Scheduled Offering  
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

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5

Preview Apply Changes Reset

<p><b>6</b> In the notification body, you will see syntax tags. These indicate a database value that is included in the emails.</p>	<p>This note confirms your registration into the following learning activity:</p> <pre>&lt;&amp;SCHED-CPNT&gt; &lt;&amp;SCHED-DESC&gt; &lt;&amp;SCHED-DESC-EDITABLE&gt;</pre>
<p><b>7</b> To modify the body of the notification, locate the body section and add text.</p> <p>You may remove existing labels and tags, or add text around them.</p> <p><b>8</b> Click <b>Apply Changes</b>.</p>	<p>Body: <input type="text" value="Please read the following information carefully:"/></p> <pre>&lt;LOOP&gt; &lt;label key="notification.Enrollment.MessageText1"/&gt;&lt;&amp;ROLLUP_MESG&gt; &lt;/LOOP&gt; &lt;LOOP&gt; &lt;label key="notification.Enrollment.MessageText2" arg0="&lt;&amp;ROLLUP_STUD_ID"&gt;" arg1=" &lt;&amp;ROLLUP_STUD_NAME"/&gt;</pre> <p><b>8</b></p> <p><b>Preview</b> <b>Apply Changes</b> <b>Reset</b></p> <p><i>Note: Click <b>Help</b> for more information on syntax tags and how to use them in notifications.</i></p>
<p><b>9</b> To attach a document to the notification, click <b>Browse</b> to search for and select the document.</p> <p><b>10</b> Click <b>Apply Changes</b>.</p>	<p>Attachment for Registration Notification</p> <hr/> <p>Current Attachment:</p> <p>New Attachment: <input type="text"/> <b>Browse...</b> <b>9</b></p> <p><b>10</b> <b>Apply Changes</b> <b>Reset</b> <b>Clear the Attachment</b></p>