

**Job Aid: Create Scheduled Offering****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

**Prerequisites**

- Introduction to Plateau Learning Administration
- Learning Needs Management
- Scheduling Management

**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**

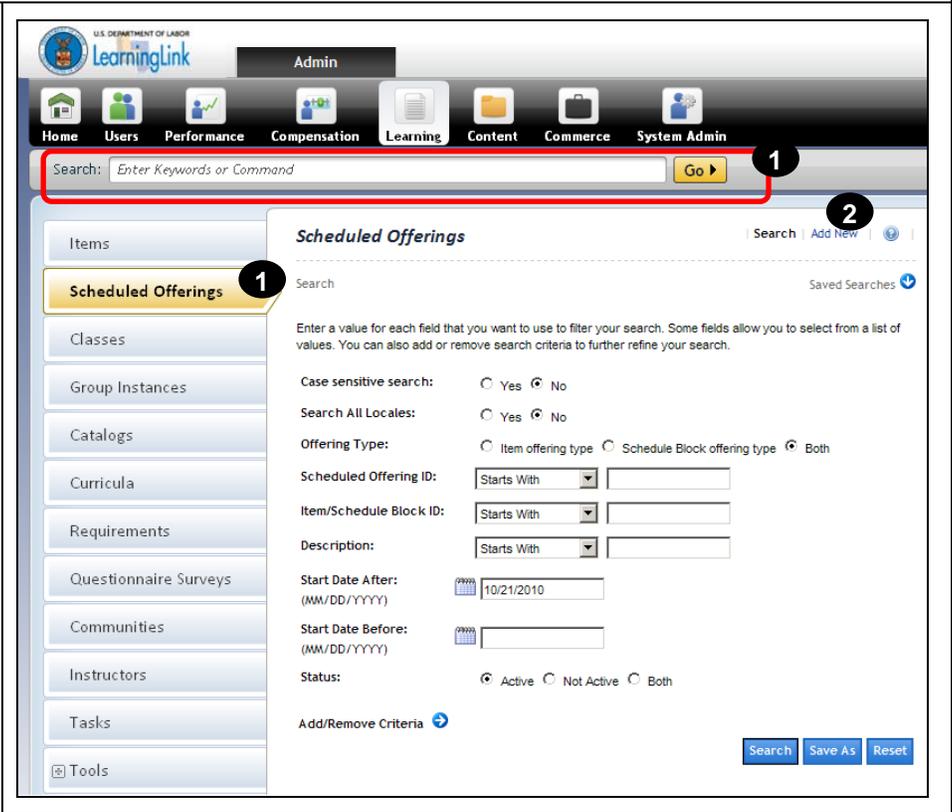
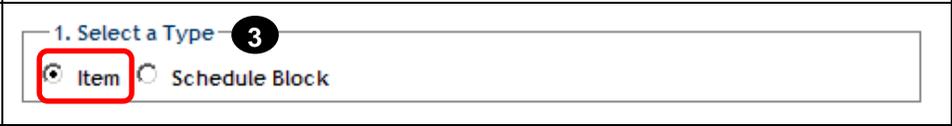
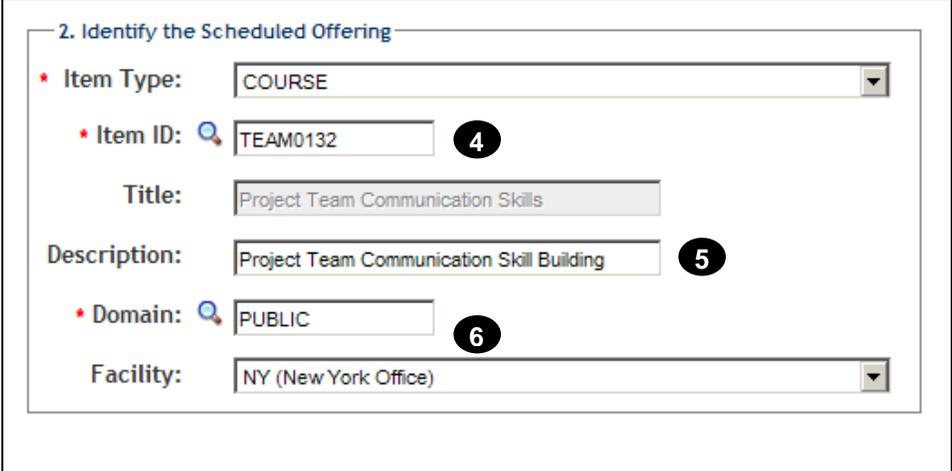
- A. Create Scheduled Offering
- B. Add Additional Segments
- C. Add Additional Resources
- D. Copy Scheduled Offering
- E. Edit Scheduled Offering Notifications

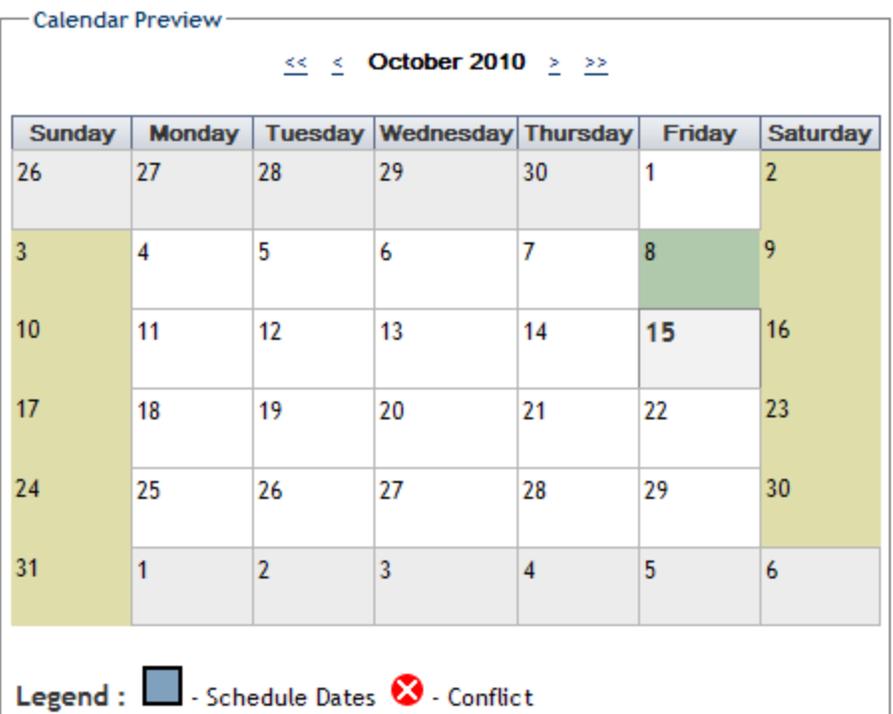
**Terminology:**

**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

<p><i>Note: Verify the Admin tab is selected.</i></p> <p><b>1</b> Navigate to Learning &gt; Scheduled Offerings.</p> <p><b>2</b> Select the Add New link. The Scheduled Offering wizard displays.</p> <p><b>or</b></p> <p><b>1</b> Enter Add Scheduled Offering in the Search box. Select Go. The Scheduling Offering wizard displays.</p>	
<p><b>3</b> Select the Item type option.</p>	
<p><b>4</b> Use the search icon (🔍) to search for and select an item (by default the Item Type and Item Title fields will be populated once an item is selected).</p> <p><b>5</b> Enter a description of the scheduled offering.</p> <p><b>6</b> Specify the appropriate Domain and Facility.</p>	

<p>View the calendar. The facility's holidays and non-working days are blocked out.</p>	
<p><b>7</b> Select the calendar icon (📅) to select a start date.</p> <p><b>8</b> Enter a start time.</p> <p><b>9</b> Change the time zone of delivery, if necessary.</p>	<p><b>3. Set Up the Segment</b></p> <p>* <b>Start Date:</b> 📅 10/25/2010 <b>7</b> (MM/DD/YYYY)</p> <p>* <b>Start Time:</b> 09:00 AM <b>8</b> (h:mm AM/PM)</p> <p>* <b>Time Zone:</b> America/New York (Eastern Standard Time) <b>9</b></p> <p><i>Note: Enter the start time in the format displayed (i.e., hh:mm AM/PM) on your specific system.</i></p>
<p><b>10</b> Use the search icon (🔍) to search for and select an instructor.</p> <p><b>11</b> Specify the location and any equipment.</p> <p><i>Note: If the scheduled offering is delivered via VLS, select the VLS server and enter the password.</i></p>	<p><b>4. Select Resources</b></p> <p><b>Primary Instructor:</b> 🔍 AYOUNG <b>10</b> 🧑🏫 ⚠️ not-authorized</p> <p><b>Primary Location:</b> CLASS-NY-05 (New York Classroom 05) <b>11</b> 🏠</p> <p><b>Equipment:</b> LCD1 (LCD Projector) 🛠️</p>

View the calendar again. The facility's holidays and non-working days are blocked out.

*Note: Resource icons (  ,  ,  ) illustrate other dates when resources are already allocated. Conflicts are denoted with a Conflict icon (  ).*

**12** Select Next.

Calendar Preview

<< ≤ **October 2010** ≥ >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25   	26  	27	28	29	30
31	1	2	3	4	5	6

Legend :  - Schedule Dates  - Conflict

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**Schedule Date/Time**

Start Time	End Time
10/25/2010 09:00 AM	10/25/2010 03:00 PM 

**13** If there are conflicts, a warning message displays. Select **No** to go back to resolve the issue, or select **Yes** to continue.

**Warning**

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**Warning Details:**

- A conflict was detected for this scheduled offering.
- The instructor(s) are not authorized to teach this item.

**Do you wish to proceed?**

**13**

**14** Add the scheduled offering to a related catalog by selecting the search icon (🔍) to search and select a catalog.

If the item resides in a catalog, it will already be listed.

**15** Select Next.

**Add New Scheduled Offering** Help

Initial Details > Publish > Confirm **15** Previous Next

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Select the **Catalogs** that should display the **Scheduled Offering** to users. Catalogs are used to determine which users see what scheduled offering. You will select only from the list of catalogs that contain the Item that you are scheduling.

Title: Project Team Communication Skills  
Description: Project Team Communication Skill Building  
Delivery Dates: 10/25/2010 09:00 AM - 10/25/2010 03:00 PM

Related Catalog:  Add

List of Selected Catalogs [Remove All]

Catalog ID	Catalog Description	
KSO-GEN	KSO General	Remove
SS	SkillSoft Course Catalog	Remove

Previous Next

*Note: If enabling self registration, the scheduled offering must reside in a catalog the intended users can view.*

**16** Confirm results.  
Select **Submit**.

**Add New Scheduled Offering** Help

Initial Details > Publish > Confirm **16** Previous Submit

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Review the Summary of the scheduled offering you are adding to the system. If you are satisfied with data that you have entered, click **Submit** to add the **Scheduled Offering** to the system.

Title: Project Team Communication Skills  
Description: Project Team Communication Skill Building  
Identifier: COURSE TEAM0132 1103830747000

**Schedule Segments Information:**

10/25/2010 09:00 AM	10/25/2010 03:00 PM
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**Resources Used:**

Instructor: AYOUNG  
Location: CLASS-NY-05  
Equipment: LCD1

**Publishing Information**

Publish to 2 Catalog(s)

Catalog ID	Catalog Description
KSO-GEN	KSO General
SS	SkillSoft Course Catalog

View the scheduled offering record.

**Scheduled Offerings**
Search | Add New |

---

> Search > Edit Summary

**Summary**

Catalog

Chargeback

Contacts

Cost Calculation

Cost Summary

Scheduled Offering ID: 4127 Bookmark

Item: COURSE TEAM0132 (Rev 4 - 12/23/2004 02:39 PM America/New York)

Title: Project Team Communication Skills

**Edit the Scheduled Offering**

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

\* = Required Fields

Apply Changes
Reset
Copy Scheduled Offering...
Delete

### Task B. Add Additional Segments

**1** Select the scheduled offering **Segments** tab.

**Scheduled Offerings**
Search | Add New |

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> Search > Edit Segments

Summary

Catalog

Chargeback

Contacts

Cost Calculation

Cost Summary

Custom Fields

Materials

Notifications

Pricing

Registration

**Segments** 1

VLS Settings

Scheduled Offering ID: 4127

Item: COURSE TEAM0132 (Rev 4 - 12/23/2004 02:39 PM America/New York)

Title: Project Team Communication Skills

**Edit the Scheduled Offering**

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

\* = Required Fields

**Add a Segment to the Scheduled Offering**

\* Start Date:

\* Start Time:

\* Time Zone:

\* End Date:

\* End Time:

Primary Instructor:

Primary Location:

Segment Description:

Send Notification  Check Conflicts

Add
Reset

**Update the Segments for the Scheduled Offering**

Apply Changes
Reset

Total Hours: 6.00

- 6 -

2 Scroll down to view the existing segment(s).  
2 Choose a segment to copy and select **Copy Daily Segments**.

### Update the Segments for the Scheduled Offering

[Apply Changes](#) [Reset](#)

Total Hours: 6.00

#### Segments

Segment 1

\* Start Date:  (MM/DD/YYYY)
 \* End Date:  (MM/DD/YYYY)

\* Start Time:  (h:mm AM/PM)
 \* End Time:  (h:mm AM/PM)

\* Time Zone:

Primary Instructor: 
 Primary Location:

Segment Description:

2

[Record Attendance](#)
[Edit Resources](#)
[Copy Resources to All](#)
[Copy Daily Segments](#)

Send Notification
  Check Conflicts

[Apply Changes](#) [Reset](#)

3 Enter a number of times to copy.

4 Select the **Check Conflicts** and/or **Send Notification** checkboxes.

5 Select **Copy**.

### Scheduled Offerings

Search | Add New | ? |

> Search > Edit Segments > Copy Daily Segments

Scheduled Offering ID: 4127

Item: COURSE TEAM0132 (Rev 4 - 12/23/2004 02:39 PM America/New York)

Title: Project Team Communication Skills

Selected Date to Copy: 10/25/2010

[Return to Scheduled Offering](#)

#### Segments for the Selected Date

Seg#	Segment	Start Date/Time	End Date/Time	Location	Instructor
1	Project Team Communication Skills	10/25/2010 09:00 AM America/New York	10/25/2010 03:00 PM America/New York	New York Classroom 05	Young, Andre

\* Number of Times to Copy:  (1000)

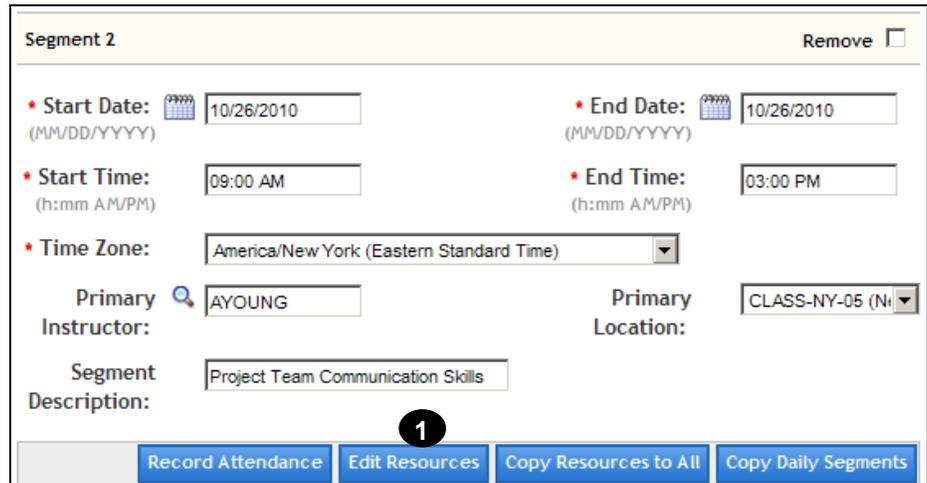
3

Check Conflicts:
  Send Notification

5  
[Copy](#) [Reset](#)

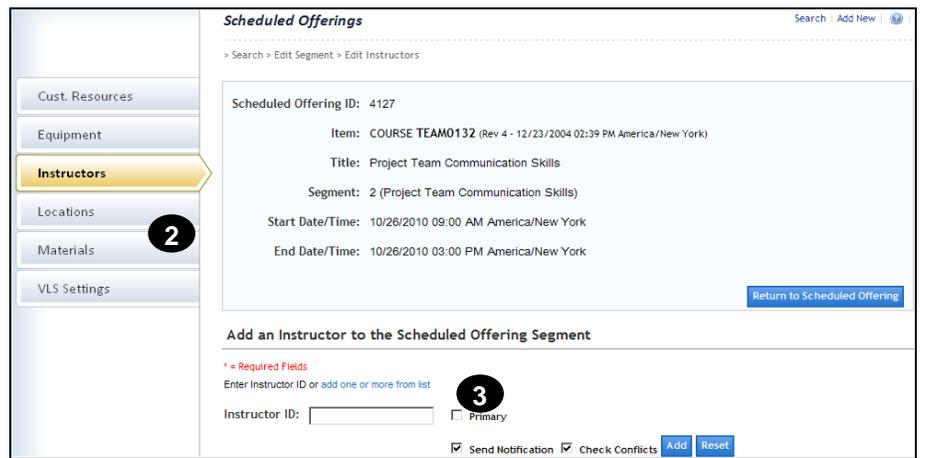
### Task C. Add Additional Resources

**1** For the segment you wish to add resources, click **Edit Resources**.



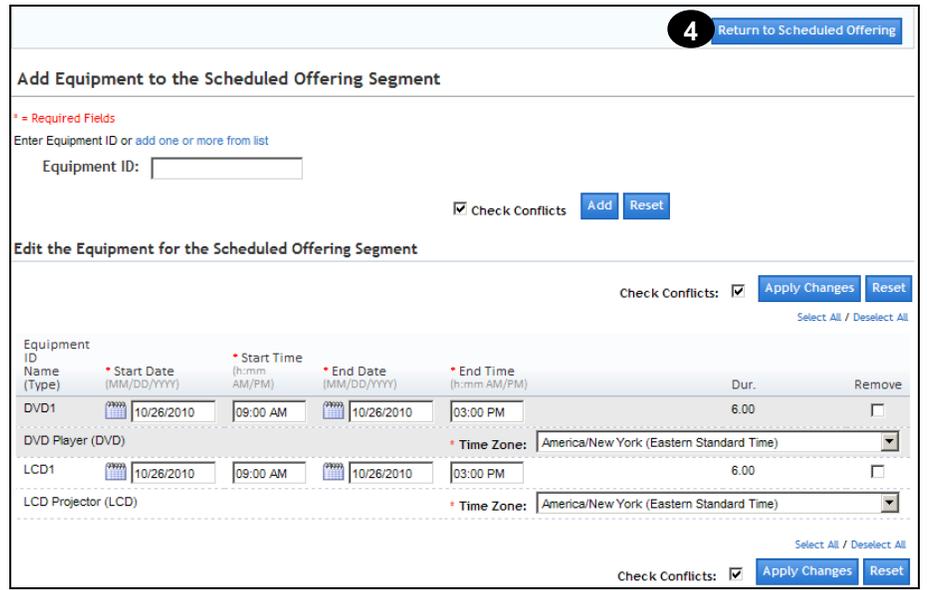
**2** Select the tab corresponding to the type of resource you wish to add.

**3** Select the **add one or more** from list\_link to search for and add additional resources.



**4** When finished adding resources, select **Return to Scheduled Offering**.

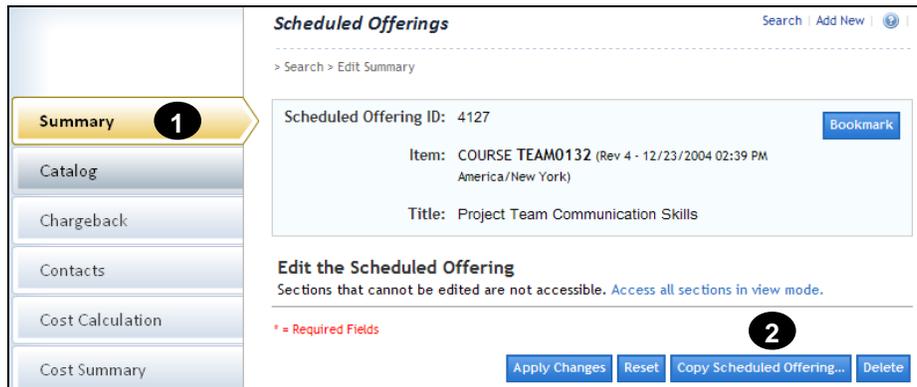
*Note: Select Copy Resources to All at the segment level to copy the new resources to all segments of the scheduled offering.*



Equipment ID	Name (Type)	Start Date (MM/DD/YYYY)	Start Time (h:mm AM/PM)	End Date (MM/DD/YYYY)	End Time (h:mm AM/PM)	Dur.	Remove
DVD1	DVD Player (DVD)	10/26/2010	09:00 AM	10/26/2010	03:00 PM	6.00	<input type="checkbox"/>
LCD1	LCD Projector (LCD)	10/26/2010	09:00 AM	10/26/2010	03:00 PM	6.00	<input type="checkbox"/>

### Task D. Copy Scheduled Offering

- 1 Select the **Summary** tab of the scheduled offering.
- 2 Select **Copy Scheduled Offering...**



**Scheduled Offerings** Search | Add New |

> Search > Edit Summary

Scheduled Offering ID: 4127 Bookmark

Item: COURSE TEAM0132 (Rev 4 - 12/23/2004 02:39 PM America/New York)

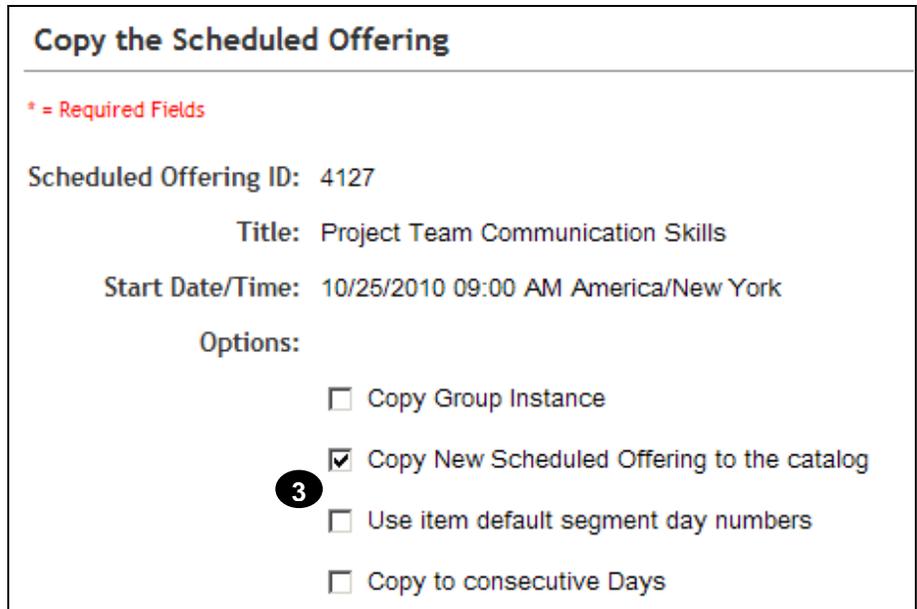
Title: Project Team Communication Skills

**Edit the Scheduled Offering**  
Sections that cannot be edited are not accessible. Access all sections in view mode.

\* = Required Fields

Apply Changes | Reset | **Copy Scheduled Offering...** | Delete

- 3 Set copy preferences by checking associated boxes.  
*Note: Select Help for additional information on each option.*



**Copy the Scheduled Offering**

\* = Required Fields

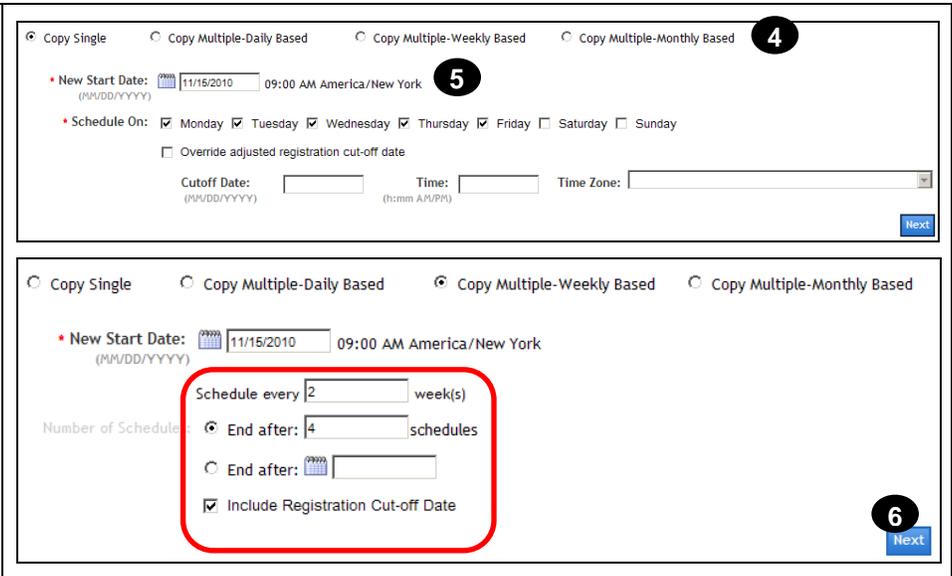
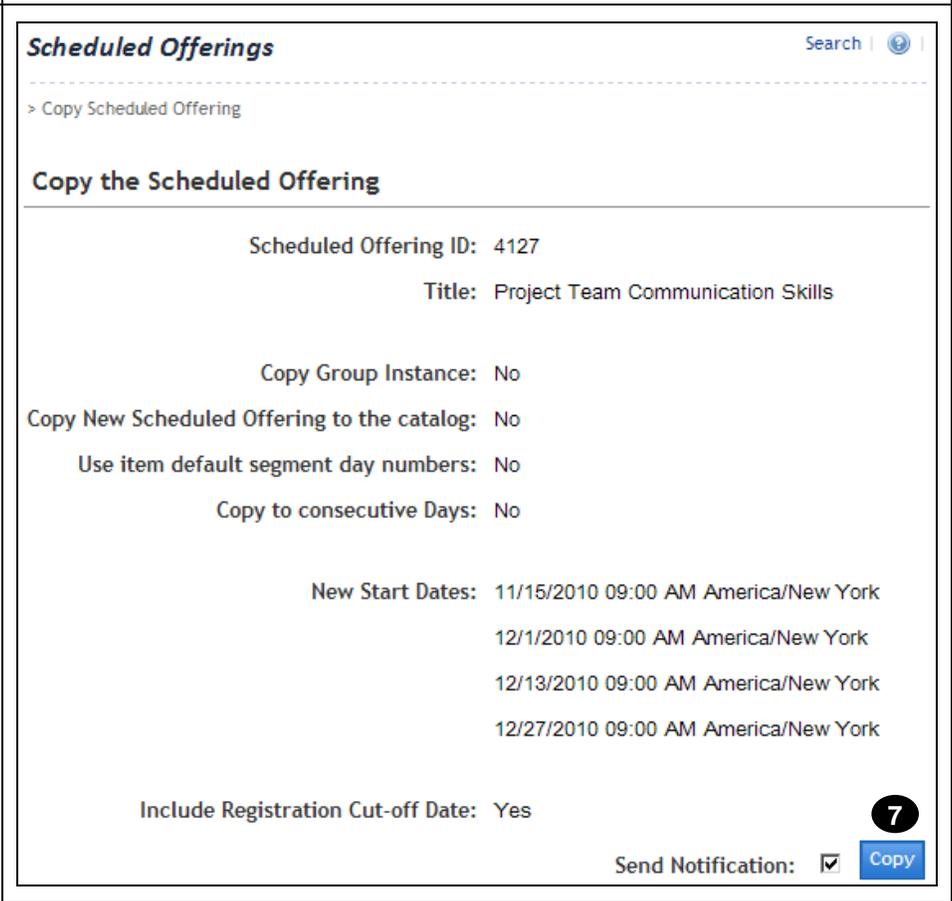
Scheduled Offering ID: 4127

Title: Project Team Communication Skills

Start Date/Time: 10/25/2010 09:00 AM America/New York

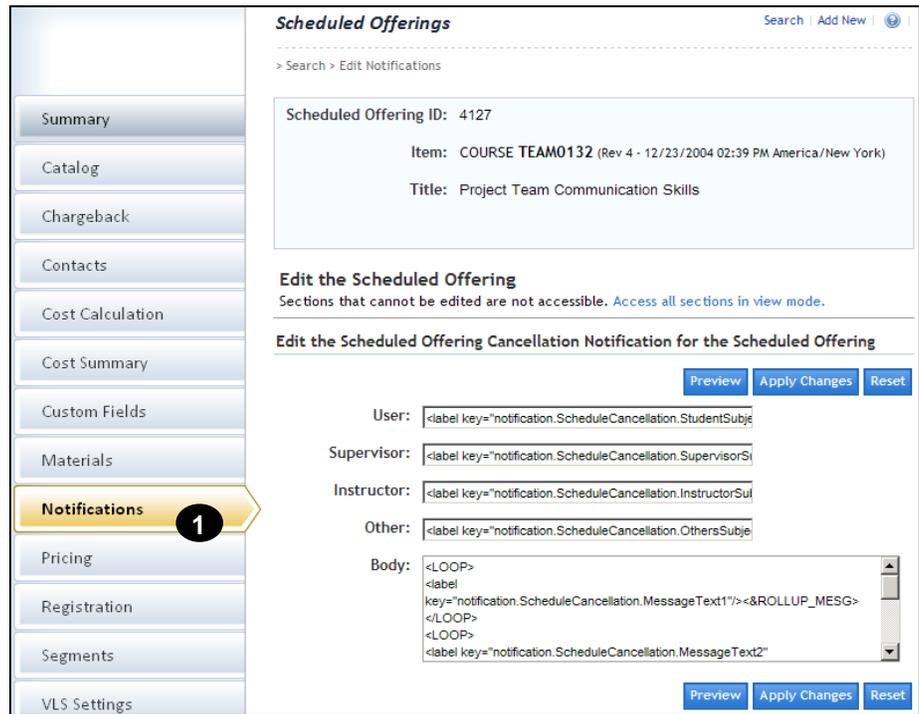
Options:

- Copy Group Instance
- Copy New Scheduled Offering to the catalog
- Use item default segment day numbers
- Copy to consecutive Days

<p><b>4</b> Select a copy frequency.</p> <p><b>5</b> Select the first scheduled offering copy start date.</p> <p><b>6</b> Select Next.</p> <p><i>Note: If you choose an option other than Copy Single, enter a scheduling frequency as seen below. This determines how many new offerings are created and how frequently they are scheduled.</i></p>	
<p><b>7</b> Confirm copy results. Select Copy.</p>	
<p><b>8</b> Once the copies are created, you can access them with the links on the final screen.</p>	

## Task E. Edit Scheduled Offering Notifications

**1** Select the **Notifications** tab of the scheduled offering.

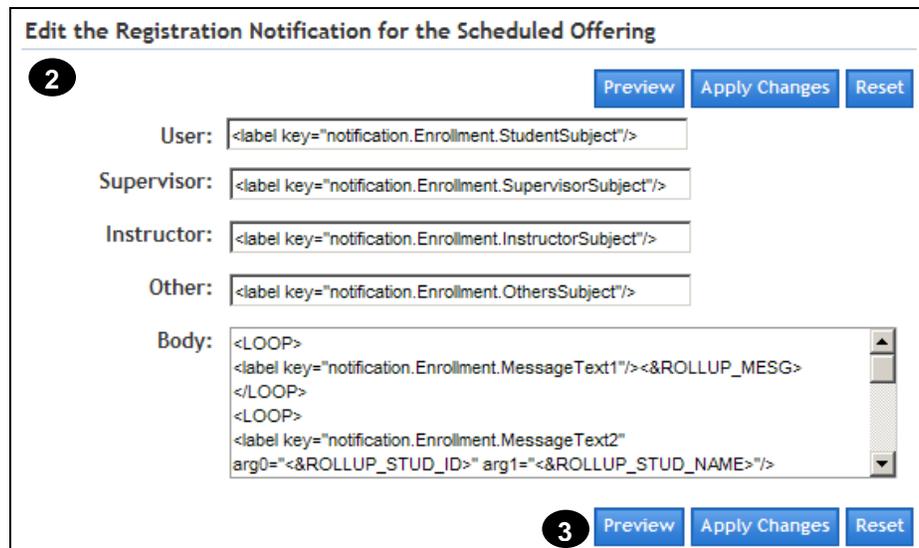


**2** Scroll down to view the notification you wish to edit.

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

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

**3** Select **Preview** to view the notification.



**4** In the notification body, you will see syntax tags. These indicate a database value that is included in the emails.

This note confirms your registration in the following learning activity:  
<&SCHD-CPNT> **4**  
<&SCHD-DESC>

<p><b>5</b> To modify the body of the notification, locate the body section and add text. You may remove existing labels and tags, or add text around them.</p> <p><b>6</b> Select <b>Apply Changes</b>.</p>	<div data-bbox="548 220 1469 514"> <p>Body: <input type="text" value="Please read the following information carefully."/> <b>5</b></p> <pre>&lt;LOOP&gt; &lt;label key="notification.Enrollment.MessageText1"/&gt;&amp;ROLLUP_MESG&gt; &lt;/LOOP&gt; &lt;LOOP&gt; &lt;label key="notification.Enrollment.MessageText2"</pre> <p><b>6</b></p> <p>Preview Apply Changes Reset</p> </div> <p><i>Note: Click Help for more information on syntax tags and how to use them in notifications.</i></p>
<p><b>7</b> To attach a document to the notification, click <b>Browse</b> to search for and select the document.</p> <p><b>8</b> Select <b>Apply Changes</b>.</p>	<div data-bbox="548 615 1469 877"> <p><b>Attachment for Registration Notification</b></p> <hr/> <p>Current Attachment:</p> <p>New Attachment: <input type="text"/> Browse... <b>7</b></p> <p><b>8</b> Apply Changes Reset Clear the Attachment</p> </div>