

## Job Aid: Create a Scheduled Offering

### Purpose

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

In this Job Aid, you will learn how to:

- Create Scheduled Offerings
- Add Additional Segments
- Add Additional Resources
- Copy Scheduled Offerings
- 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 a duration that facilitates variable resource scheduling.

## Task A. Create Scheduled Offering

**Note:** Verify that the **Admin** tab is selected.

1. Select the **Learning** tab.
2. Click **Scheduled Offerings**. The **Schedule Offerings** screen appears.
3. Click the **Add New** link. The **Add New Scheduled Offering** screen displays.
4. Click the **Item** radio button under **Select a Type**.





5. Use the drop-down menu to select an **Item Type** (by default the **Item Type** and **Title** fields will be populated once an item is selected).
6. Click the **Search** icon to select an **Item ID**.
7. Complete the **Description** field with information about the Scheduled Offering.
8. Enter the appropriate **Domain** (VALU).
9. Select the **Facility** from the drop-down menu.
10. Use the **Calendar Preview** to determine available dates. The facility's holidays and non-working days are blocked out.

1. Select a Type  
 Item  Schedule Block

2. Identify the Scheduled Offering

\* Item Type: DOD

\* Item ID: 1304960

Title: DFAS

Description:

\* Domain: VALU

Facility: ADVANCE-001 (Hilton Miami Downtown, 1601 Biscayne Blv)

Calendar Preview

<< < May 2011 > >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
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

11. Under **Set Up the Segment**, click the **Calendar** icon to select a **Start Date**.
12. Enter a **Start Time**.
13. Use the drop-down menu to change the **Time Zone** of delivery, if necessary.

3. Set Up the Segment

\* Start Date: 06/20/2011  
(MM/DD/YYYY)

\* Start Time: (hh:mm AM/PM)

\* Time Zone: America

4. Select Resources

Primary Instructor:

Primary Location:

Equipment:

Calendar - Windows Int...

https://va-stage.plateau.com/plateau

Select Date

May 2011

May 2011

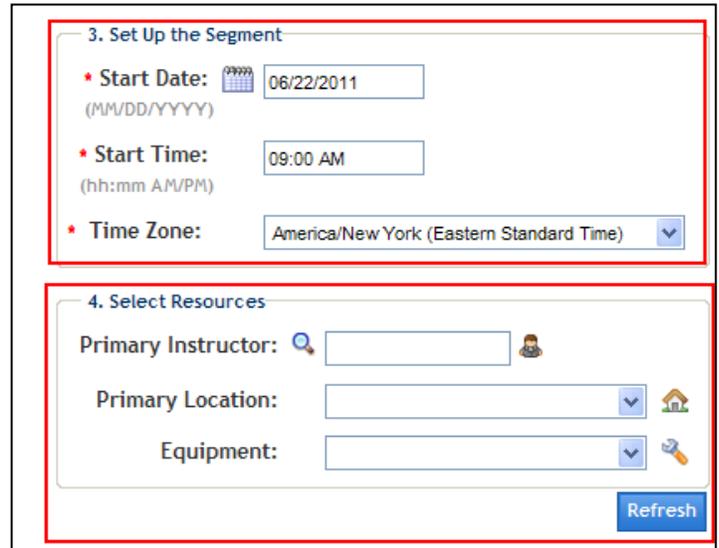
May 2011

Print Today

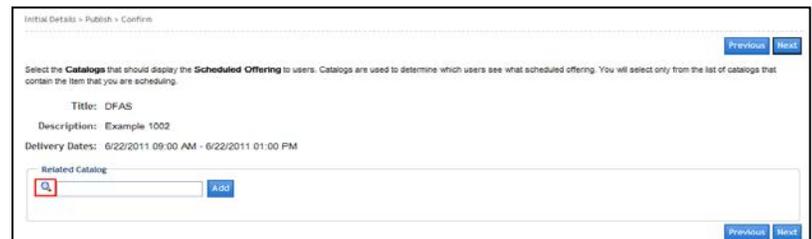
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Internet 100%

14. Under **Select Resources**, use the **Search** icon to search for and select a **Primary Instructor** or leave blank.
15. Use the drop-down menus to specify the **Primary Location** and any **Equipment** or leave blank.
16. View the calendar again. The facility's holidays and non-working days are blocked out.  
**Note:** The **Resources** icon illustrates other dates when resources are already allocated. Conflicts are denoted with a **Conflict** icon.
17. Click **Next**. If there are conflicts, a warning message displays. Click **No** to go back to resolve the issue, or click **Yes** to continue.



18. Add the scheduled offering to a **Related Catalog** by clicking the **Search** icon to search for and select a catalog.



19. If the item resides in a catalog, it will already be listed. Click the checkbox under the **Add** column.
20. Click **Add**.



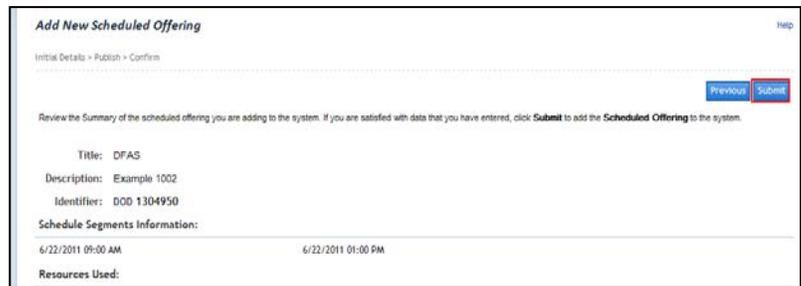
Catalog ID	Description	Add
Test	Test	<input type="checkbox"/>
VALU-STANDARD	VA Learning University Catalog	<input checked="" type="checkbox"/>

21. Confirm results and click **Next**.



Catalog ID	Catalog Description	Remove
VALU-STANDARD	VA Learning University Catalog	<input type="checkbox"/>

22. Click **Submit** to view the scheduled offering record.



**Add New Scheduled Offering** Help

Initial Details > Publish > Confirm

[Previous](#) [Submit](#)

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: DFAS  
 Description: Example 1002  
 Identifier: DOD 1304950

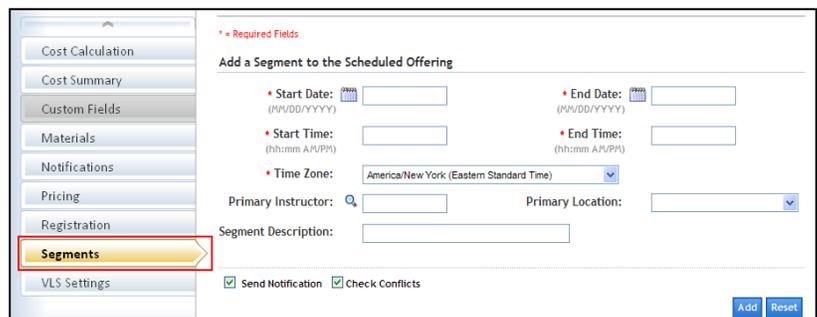
Schedule Segments Information:  
 6/22/2011 09:00 AM 6/22/2011 01:00 PM

Resources Used:



## Task B. Add Additional Segments

1. Continue with the same screen from Task A Step 18.
2. Click the **Segments** tab.
3. Click the **Edit** icon.



**\* = Required Fields**

**Add a Segment to the Scheduled Offering**

• Start Date: (MM/DD/YYYY)  • End Date: (MM/DD/YYYY)

• Start Time: (hh:mm AM/PM)  • End Time: (hh:mm AM/PM)

• Time Zone: America/New York (Eastern Standard Time)

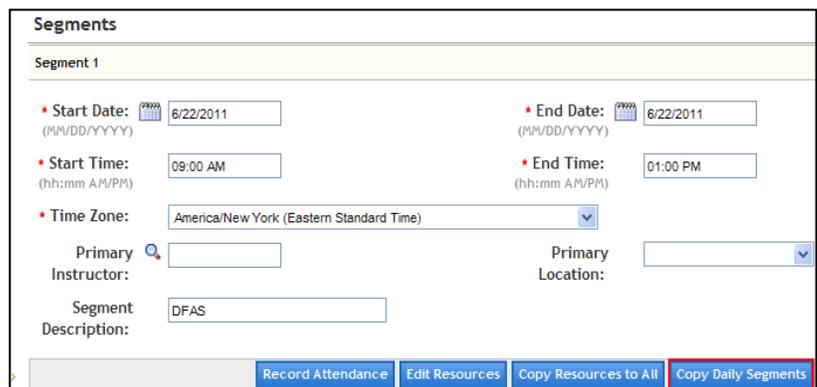
Primary Instructor:  Primary Location:

Segment Description:

Send Notification  Check Conflicts

[Add](#) [Reset](#)

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



**Segments**

Segment 1

• Start Date: (MM/DD/YYYY) 6/22/2011 • End Date: (MM/DD/YYYY) 6/22/2011

• Start Time: (hh:mm AM/PM) 09:00 AM • End Time: (hh:mm AM/PM) 01:00 PM

• Time Zone: America/New York (Eastern Standard Time)

Primary Instructor:  Primary Location:

Segment Description: DFAS

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

- Complete the **Number of Times to Copy** field.
- Click the **Check Conflicts** and/or **Send Notification** checkboxes.
- Click **Copy**.

**Segments for the Selected Date**

Seg#	Segment	Start Date/Time	End Date/Time	Location	Instructor
1	DFAS	6/22/2011 09:00 AM America/New York	6/22/2011 01:00 PM America/New York		

\* Number of Times to Copy:  (1000,001)

Check Conflicts:  Send Notification:  **Copy** **Reset**

### Task C. Add Additional Resources

- Continue with the same screen from Task B, Step 6.
- For the segment (for example, Segment 1) to which you wish to add resources, click **Edit Resources**.

**Segments**

Segment 1 Remove

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

\* Start Time:  \* End Time:   
(hh:mm A/P/PP) (hh:mm A/P/PP)

\* Time Zone:

Primary Instructor:  Primary Location:

Segment Description:

**Record Attendance** **Edit Resources** **Copy Resources to All** **Copy Daily Segments**

- Select the tab corresponding to the type of resources you wish to add. For example, select **Locations**.
- Click the **add one or more from list** link to search for and add additional resources.

**Locations** \* = Required Fields

Enter Location ID or [add one or more from list](#)

Location ID:   Primary

Check Conflicts **Add** **Reset**

- When finished adding resources or if there was nothing to add, click **Return to Scheduled Offering**.  
**Note: Click Copy Resources to All** at the segment level to copy the new resources to all segments of the scheduled offering.

Scheduled Offering ID: 613850

Item: DOD 1304950 (Rev 1 - 4/27/2010 04:24 PM America/New York)

Title: DFAS

Segment: 1 (DFAS)

Start Date/Time : 6/22/2011 09:00 AM America/New York

End Date/Time : 6/22/2011 01:00 PM America/New York

**Return to Scheduled Offering**

## Task D. Copy Scheduled Offering

### Talent Profile: Accessing

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



**Summary** | 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 clicking associated checkboxes.  
**Note:** Click **Help** for additional information on each option.



**Copy the Scheduled Offering**

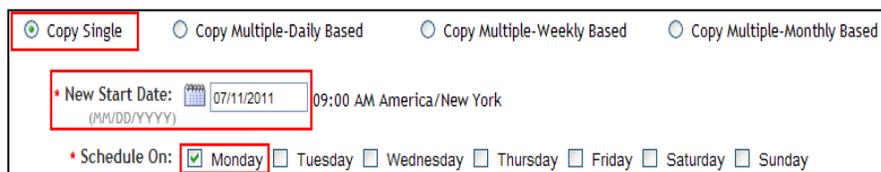
\* = Required Fields

Scheduled Offering ID: 613850  
Title: DFAS  
Start Date/Time: 6/22/2011 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

4. Select a Copy Frequency. For example, select **Copy Single**.
5. Enter a **New Start Date** for the first scheduled offering copy start date.
6. Click the appropriate checkbox for the **Schedule On** day.
7. Click **Next**.  
**Note:** If you chose an option other than **Copy Single**, enter a scheduling frequency to determine how many new offerings are created and its schedule frequency.



**Copy Single** |  Copy Multiple-Daily Based |  Copy Multiple-Weekly Based |  Copy Multiple-Monthly Based

\* New Start Date:  09:00 AM America/New York  
(MM/DD/YYYY)

\* Schedule On:  **Monday** |  Tuesday |  Wednesday |  Thursday |  Friday |  Saturday |  Sunday

8. Confirm copy results. Click **Copy**.



**Copy the Scheduled Offering**

Scheduled Offering ID: 613850  
Title: DFAS

Copy Group Instance: No  
Copy New Scheduled Offering to the catalog: Yes  
Use item default segment day numbers: No  
Copy to consecutive Days: No

New Start Dates: 7/11/2011 09:00 AM America/New York

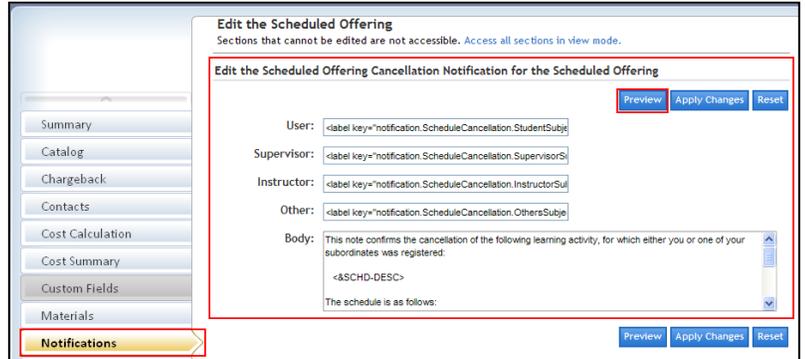
Include Registration Cut-off Date: Yes

Send Notification:  **Copy**

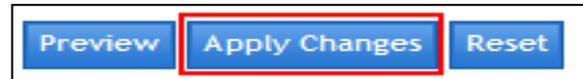
## Task E. Edit Scheduled Offering Notifications

### Talent Profile: Accessing

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 Cancellations
  - User Registration
  - User Window
  - User Waitlist
  - User Waitlist Removal
  - User Pending Status
3. Click **Preview** to view the notification. Syntax tags are displayed in the notification body indicating a database value included in the emails.



4. To modify the body of the notification, close the window to go back to the previous screen. Make changes in the body as appropriate. You may remove existing labels and tags, or add text around them.
5. Click **Apply Changes**.



6. To attach a document to the notification, click **Browse** to search for and select the document.
7. Click **Apply Changes**.

