

Feature Guide: Event Session Wizard



ONPOINT

August 2014

Table of Contents

Section 1: Locating the Event Session Wizard in Course Manager2

Section 2: Creating a New Event Session via the Wizard4

 Step 1 – Select Event4

 Step 2 – Select Event Class4

 Step 3 – Specify Session Date & Time5

 Step 4a – Specify Instructor-Led Session Information.....5

 Step 4b – Specify Webinar Session Information6

 Step 5 – Specify Session Registration Information.....7

Section 3: Associated Notifications8

Section 4: Event Session Approvals10

 Step 1: Locating the Pending Event Session Requests10

 Step 2 – Approving a Pending Event Session.....10

 Step 3 – Denying a Pending Event Session11

Event Session Wizard Introduction

The new Event Session Wizard is designed primarily to assist Administrators who have restricted access to the full Events area of Course Manager, with creating event sessions. Using the Event Session Wizard, a lower-level Administrator can easily create sessions of existing Events. [The Event as well as the Class of the Event they wish to assign sessions to must already exist.] The wizard can be accessed by any level Admin with rights to the Wizard, but because it has more limited options, a more experienced Admin might prefer to create an event session in the standard Events area instead.

All sessions created using the Event Session Wizard are created in a PENDING status and will need to be approved and processed to an Approved status by an Administrator with approval rights.

How might this be useful?

In some organizations, an instructor might need the ability to create their own event sessions in order to manage their own training calendars or to accommodate changes with attendees, but the L&D team needs to maintain control of the master Event Calendar. In this example, those instructors with a Course Manager license could be given access to a limited set of Course Manager functionality by making their System Role either Content Administrator, Course Coordinator or Event Manager and setting the available Admin Matrix configuration to allow management of creating event sessions via the wizard while limiting any or all other Course Manager permissions.

Note: Currently, only Root Administrators can access the Admin Matrix to restrict functionality within the Course Manager application by system role.

Section 1: Locating the Event Session Wizard in Course Manager

If you have an administrator license (with a system role of Site Admin, Content Admin, Course Coordinator, or Event Manager), you will see a link to access the Course Manager application from the online Portal – Manager Options area. Click the link to open Course Manager.

The screenshot shows the OnPoint Portal interface. At the top, it says "ONPOINT DIGITAL learning and performance solutions" and "OnPoint Portal". Below that, it says "Welcome Chad Ebel. Last Login: Jul-15-2014 9:17 AM" and has links for "My Profile", "Help", and "Logout".

On the left side, there are sections for "MESSAGES" (Announcements: 1 of 1, Notifications: 27 of 27), "LEARNING RESOURCES" (Nuggets, Document Manager, Company Directory), "SEARCH" (Enter Search Term, GO), and "MANAGER OPTIONS" (Course Manager, Event Attendance). A blue arrow points to the "Course Manager" link in the Manager Options section.

The main content area has tabs for "Learning Paths", "Courses", "Events", "Activities", and "My Status". Below the tabs, it says "Welcome to the Online Learning Center" and provides instructions on how to use the tabs. There is a "View Course Catalog" button and a note about pending assignments.

Below that, there is a section for "Available Assignments" with a "Refresh" button. It lists several courses and their status:

Courses	Status
CLARO Demo Course	Not Attempted
HTML Course with test	Not Attempted
MO102B12E - Cookhouse Favourites	Not Attempted
QA - Cricket SCORM	Not Attempted
SCORM with OPtest	Incomplete

Below the assignments, there is a section for "Assessments" with one item:

Assessments	Status
Anon Set	Not Attempted

At the bottom, it says "Copyright © 2002-2014 OnPoint Digital. All rights reserved." and "powered by OnPoint".

Once in the Course Manager application, you will see the options available to you in the top level Main Menu. (This example shows a very limited view for an Admin with a system role that has been restricted to only seeing the Event Session Wizard under the Events & Activities Main Menu drop-down, and nothing else.)

Hover over Events & Activities to expose the Event Session Wizard selection, and click to select it.

ONPOINT DIGITAL
learning and performance solutions

Events & Activities

Event Session Wizard

Welcome to the Learning Server Course Manager.

Login Information

Customer: OnPoint Testing Slice - currently set to use token auth
Administrator: Ebel, Chad
Role: Content Administrator

Access

opcm · 04-Aug-2014 16:50:43 · Chad Ebel
opportal · 04-Aug-2014 16:50:39 · Chad Ebel
opreg · 04-Aug-2014 16:45:08 · Administrator OnPoint

Learning Server Information

Version: 5.4.66 Last Restart: Thu 31-Jul-2014 23:36 Server Time: Mon 04-Aug-2014 16:50 (EDT -0400)

Clear Filters Versions Status

Section 2: Creating a New Event Session via the Wizard

Selecting Event Session Wizard will open the Events: Session Wizard page.

Step 1 – Select Event

This Select Event page shows the current ACTIVE events within the database, organized by Category. You are able to filter this list using the Type, Category and/or Name filters available. Select the Event you are looking for by clicking on its name.

The screenshot shows the 'EVENTS: SESSION WIZARD' interface. At the top, it says 'Step 1 of 5 - Select Event'. Below this, there are filter options: 'Filter: Type: Instructor-Led', 'Category: All', and a 'Name:' field. An 'Apply' button is visible. The main content is a table of events:

ID	Event Name	Description
Danger Room Training		
315	new new new	
314	TestPMEEventTriggers	Testing that all triggers work for events assigned through PM.
FA category		
311	FA Coffee Training - FACT	FACT - coffee is good.
313	Test Event	Test Event
General		
237	Heidi's Test Event	
300	Lunch and Learn	Come learn about new things during lunch
305	Phone System Training for All	Aren't new phones fun!
302	Test Event - GF	Test Event - GF
303	Test instructor-led location training	
304	Test Skill Practice	Test

Step 2 – Select Event Class

The next screen is the Select Event Class page. This page shows all previously created Classes for the Event you just selected. [The image below shows just one existing class, but if there is more than one class created for the event then multiple classes would appear here.] Click the Class Name desired to proceed.

The screenshot shows the 'EVENTS: SESSION WIZARD' interface at Step 2 of 5 - Select Event Class. The 'Event' is 'Lunch and Learn' and the 'Class' is 'Not selected'. Below this, there is a 'Select Event Class' section with a table:

Class Name	Duration	Instructor(s)
Class A	0:35	

If for any reason you selected an Event by mistake, you can move back a Step in the process by clicking the Select Event button and select again.

Step 3 – Specify Session Date & Time

The next step is to set up the new Session being created. Notice the top of the page shows the Event and Class selections that have been made, in this example (Event: Lunch and Learn and Class: Class A). If for any reason you need to change the Class, use the Select Class button to move back a step in the process and select again.

Set the Date and Start Time of the Session. Use the icon next to the Date field to open a calendar to easily select a date from. You can manually enter a time, or select from the drop-down options provided.

Locations can be entered manually, or selected from a predefined list (if available) by using the [Select](#) hyperlink. Using predefined event locations is ideal, so that Admins don't manually create event locations with slightly different names that represent the same place.

The area to the right will display the Date, Time and Location of any future Currently Scheduled Class Sessions. This is designed for reference purposes only, just to assist the Admin who is scheduling a new session. If you attempt to overbook a date, time, location or instructor, a red 'alert' message will appear warning you of the overlap. You can still continue with an overbooking; we are just cautioning you.

Press Continue in the top right corner to move to the next page.

Set the Date and Start Time of the Session as well as the Location. Use the icon next to the Date field to open a calendar to easily select a date from. You can manually enter a time, or select from the drop-down options.

Step 4a – Specify Instructor-Led Session Information

If you have selected an Event that is an Instructor-Led type, the next step in the process will be to specify the Instructor for the Session along with an Alternate Instructor. Choose these instructor names from the drop-down lists or enter the Instructor's name(s) in the [Other:] fields provided if those names are not present in the drop-downs.

Next, set the Max Registrations for the session if applicable (note that if there is no maximum number of attendees allowed, leave the 0 as the default entry). Set the Time Zone for where the Event Session is being held by selecting from the choices in the drop-down. Notice that the Session Status is set to 'Pending', and this will remain the status until the new session is approved by an Administrator (any Administrator license role with access to the Events or Pending area based on the administrative matrix).

Step 4b – Specify Webinar Session Information

If you have selected an Event that is a Webinar type, the next step in the process will be to specify the URL link to display for connecting to the webinar.

Next, follow the instructions in 4a above to complete the Instructor information along with the Max Registrations and Time Zone. [Note that the Instructor may have been a default entry when the Event Class was created, and if so, that Instructor’s name will auto-fill for a new session, though it is easily changed.]

Webinar-type Event sessions also allow you the option to specify an ‘Accepted Join Time’ both before and after the start of the session. Enter the number of minutes (e.g. 7 in the Pre field and 10 in the Post Start field) to set this session up to allow attendees to join 7 minutes or closer to the Start time, and up to 10 minutes after the webinar has started. If the fields are left blank, attendees may join at any time.

Other optional fields allow you to add a Conference Phone number and Conference ID if desired.

Note: If you utilize OnPoint’s WebEx module, these configuration settings will likely already be established.

Again, the Session Status will be set as 'Pending' until it is approved.

Step 5 – Specify Session Registration Information

The final step of the process is to set the Registration Open and Close parameters. Choose the Open Registration Date by clicking the calendar icon and choosing a date for when users can begin registering for this new session. Alternatively, you can specify a certain number of days/hours/minutes before the date of the session to allow for registration to occur. Follow the same step for setting the Close Registration Date.

These are optional settings. If no Open or Close Registration Dates are specified, registration will be open to users as soon as the session is approved and viewable in the Event Catalog, and users will be able to register for the session right up until the session start time.

Once completed, click the Create Session button in the top right corner and await approval by a manager to process and change to an Approved/Active status.

The screenshot shows a web browser window with the URL https://d2.mlearning.com/opcm/pages/events/event_wizard.jsp. The page header includes the OnPoint logo and navigation links for Home, Help, and Logout. The main content area is titled 'EVENTS: SESSION WIZARD' and displays the following information:

- Event: Lunch and Learn
- Class: Class A

The current step is 'Step 5 of 5: Specify Session Registration Information'. The form contains two main sections:

- Open Registration Date:** A date picker icon and a text input field. Below it, a radio button is selected for 'Or Before Start - Days: 0', 'Hrs: 0', and 'Mins: 32'.
- Close Registration Date:** A date picker icon and a text input field. Below it, a radio button is selected for 'Or Before Start - Days: 0', 'Hrs: 0', and 'Mins: 32'.

In the top right corner of the form area, there are two buttons: 'Session Information' and 'Create Session'.

Section 3: Associated Notifications

There is a new Trigger available for Event Sessions Pending. When the Wizard steps are complete and an event session is created as PENDING, then this trigger can be fired to alert specific admins that there is a new Event Session that needs to be approved.

[There is no trigger for Event Session Approved at this time.]

To check whether an Event has an Create-Pending-Event-Session trigger set up, select the Event from the Events & Activities main menu dropdown, and select the Triggers submenu.

EVENTS: INSTRUCTOR LED TRAINING

Information Classes Assignments **Triggers** Advanced Prerequisites Certificates Skills & Games

Event: Document Management Training

+ Add Class Revise Schedule Check Session Assignments Master Calendar Show Past Sessions

Class: Presentation Edit Class Add Session Class Scheduling

Session Date	Status	Time	Time Zone	Location	Instructor	Maximum	Attended	No Show	Approved	Denied	Pending
25-Aug-2014	Pending	9:00 am	US/Central			unlimited	0	0	0	0	0

Missing session assignments: 19 Assign

If the Create-Pending Event Session Trigger is not present and you need to add it, select it from the Trigger Action dropdown in the upper right of the screen, and click the Add button.

EVENTS: INSTRUCTOR LED TRAINING

Information Classes Assignments **Triggers** Advanced Prerequisites Certificates Skills & Games

Event: eSS Training tip Trigger Action: Create-Pending-Event-Session + Add

Assigned-To-Event Standard Notification

Notifications:	Title	Destination	Email	SMS	Status	When	Calendar
	Event Assignment - [tbl_event.event_name]	User	None	None	Active	Immediately	

Complete-Event Standard Notification

Notifications:	Title	Destination	Email	SMS	Status	When	Calendar
	Event Completion - [tbl_event.event_name]	User	None	None	Active	Immediately	

Approved-For-Event-Session Add Notification Add Assignment Remove Action Override Standard: No Add Notification

Create-Pending-Event-Session Add Notification Add Assignment Remove Action Override Standard: Yes

Notifications:	Title	Destination	Email	SMS	Status	When	Calendar
	Event Notification	User	None	None	Active	Immediately	Trigger Header

The trigger will then display as the last new item on the page, and you will have the opportunity to use the Add Notification link to create your unique message.

Trigger Notification

Trigger: **Create-Pending-Event-Session**

Title:

Click on items in the list at right to add them to the message

Message:
[HTML Editor](#)

Online Link:

Mobile Link:

Send To:

Via: Standard Notification
 Email
 SMS (140 character limit, No HTML)
 Mobile Push (200 character limit, No HTML)

Other Email:

When: On: Days: Hours: Minutes:

Date: year month day

Calendar: (Attach a calendar update to the notification email)

User Fields

- user_first_name
- user_last_name
- user_title
- user_organization
- user_email
- Dealer Type
- Dealer Name
- Employee Number
- Zone
- Market
- Position

Fields

- session_id
- cust_id
- event_id
- class_id
- location_id
- resource_cal_id
- class_location
- start_date
- max_registration
- instructor
- instructor_id
- event_timezone
- conference_server
- conference_room
- prior_close
- pre_join_time

Deep Links

Filter:

Once on the Trigger Notification page, you can enter the actual message text that you want to be sent out, who the message will be sent to, how it will be sent, and when the message is to be sent. [See the regular system documentation for details about how to use all the features available when creating a triggered notification.]

What happens if the session is not approved?

There really isn't an 'approval' process per se; the admin just changes the status from "Pending" to "Approved." If the Admin doesn't approve of the session, they can simply delete it and/or communicate to the admin who created it to try again.

Note: OnPoint will consider additional functionality in this area for an upcoming release.

How does an Admin see the new session?

Once the session has been approved, then any admin can see it as approved on the master event calendar in Course Manager. Also, the admin would be able to see it in Content Viewer as a user.

Section 4: Event Session Approvals

When Event Sessions are created in Course Manager using the Event Session Wizard, they are always created in a Pending status. All pending sessions need to be processed to an Approved status prior to being available via the Master Event Calendar or within a catalog.

Any Admin roles have the rights (per the Admin matrix settings) to process pending event sessions from the home page of the Course Manager application.

Step 1: Locating the Pending Event Session Requests

Once in the Course Manager application the Homepage provides a pending Section on the right half of the screen. The bottom item in this list is the Pending Event Session Requests item. If there are sessions currently in a pending status the **Approve** link will be active. If there are no Pending event session requests, it will display None.

The screenshot shows the OnPoint Manager interface. The top navigation bar includes 'Users & Groups', 'Content', 'Assessments', 'Skills', 'Events & Activities', 'Notifications', and 'Administration'. The main content area is titled 'ONPOINT MANAGER' and includes a welcome message and several sections: 'Login Information', 'License Information', and 'Learning Server Information'. On the right side, there is a 'Pending' section with a list of pending requests and an 'Approve' column. The 'Approve' column contains links for 'Approve', 'None', 'Approve', 'Approve', 'None', 'Approve', 'None', and 'Approve'. A blue arrow points to the 'Approve' link for 'Pending event session requests'.

Item	Access
Course requests pending approval:	Approve
Assessment Set request pending approval:	None
Nugget requests pending approval:	Approve
Event registrations pending approval:	Approve
User activity completions:	None
Delete requests pending:	Approve
My Media file uploads pending:	None
Pending event session requests:	Approve

Step 2 – Approving a Pending Event Session

To approve Event Sessions that are currently in the pending status you would click the **Approve** hyperlink. This will open the Events: Pending Sessions page. From here you can view the details of each of the currently pending Event Sessions. Click the checkboxes under the Approve column for any sessions you wish to approve, then click the Approve button at the bottom left of the page.

The screenshot shows the 'EVENTS: PENDING SESSIONS' page in the OnPoint Learning Server. The page includes a navigation menu with 'Users & Groups', 'Content', 'Assessments', 'Skills', 'Events & Activities', 'Notifications', and 'Administration'. There are also links for 'Home', 'Help', and 'Logout'. Below the navigation is a sub-menu with 'Home' and 'Master Calendar'. The main content is a table with the following columns: 'Approve', 'Event', 'Class', 'Session Date/Time', 'Duration', 'Location', and 'Instructor(s)'. The table contains 16 rows of event sessions. A blue arrow points to the '19 Test Event' row, which has a checked checkbox in the 'Approve' column. Another blue arrow points to the 'Approve' button at the bottom left of the table.

Approve	Event	Class	Session Date/Time	Duration	Location	Instructor(s)
<input type="checkbox"/>	FA Coffee Training - FACT	FA Coffee Training : FACT Thursday	05-Jun-2014 08:00 AM	0:05		Test User, Test User
<input type="checkbox"/>	Shoelace Tutorial	Forsyth Park	12-Jun-2014 09:00 AM	1:00	Atlanta	Boyette - admin, Alan
<input type="checkbox"/>	FA Coffee Training - FACT	FA Coffee Training : FACT Friday	13-Jun-2014 09:00 AM	0:00	Savannah	
<input checked="" type="checkbox"/>	19 Test Event	class1	19-Jun-2014 08:00 AM	0:03		None, FTester1 Duration, FTester2
<input type="checkbox"/>	6.19 Test Event	class2	19-Jun-2014 08:00 AM	0:03		Permanent, FTester3 Duration, FTester2
<input type="checkbox"/>	FA Coffee Training - FACT	FA Coffee Training : FACT Thursday	19-Jun-2014 09:00 AM	0:05	Savannah	Tester 2, QA
<input type="checkbox"/>	6.19 Test Event	class1	19-Jun-2014 09:00 AM	0:03	Atlanta	Permanent, FTester3 Duration, FTester2
<input checked="" type="checkbox"/>	FA Coffee Training - FACT	FA Coffee Training : FACT Thursday	23-Jun-2014 09:00 AM	0:05	Savannah	
<input type="checkbox"/>	FA Coffee Training - FACT	FA Coffee Training : FACT Thursday	26-Jun-2014 09:00 AM	0:05	Savannah	Tester 2, QA
<input type="checkbox"/>	FA Coffee Training - FACT	FA Coffee Training : FACT Thursday	28-Jun-2014 08:00 PM	0:05	Savannah	Tester 2, QA
<input type="checkbox"/>	FA Coffee Training - FACT	FA Coffee Training : FACT Thursday	30-Jun-2014 09:00 AM	0:05	Savannah	BoyettePerformance, Hannah
<input type="checkbox"/>	new new new	cllllllllaaaaaaaaaaaa	30-Jun-2014 08:00 PM	0:00	Atlanta	Boyette - admin, Alan
<input type="checkbox"/>	TestPMEEventTriggers	TheOneClassNeeded	02-Jul-2014 09:00 AM	2:00	Atlanta	
<input type="checkbox"/>	QA Test Event - 4-30	Class One	07-Jul-2014 09:00 AM	4:00		
<input type="checkbox"/>	Lunch and Learn	Class A	30-Aug-2014 09:00 AM	0:35	Atlanta	Ebel, Chad Duration, FTester2

Please note that as you select these items and click on the Approve button you will remain on the Events: Pending Sessions page. The events that have been approved will be removed from the list and will no longer appear on the screen. In order to go back to the main menu you will need to select the Home button on the top of the page to exit the Events Pending page. When returned to the home page, if you have approved all the pending session requests, the home page should now show None instead of an Approve link.

Step 3 – Denying a Pending Event Session

The Events: Pending Sessions page currently only handles an approval function. If you do not approve of a pending event session request, you would need to utilize the Events & Activities area of the Course Manager to update the Event Session details or contact the creator of the Event Session and have them make the updates prior to being able to approve it.

Note: OnPoint will consider additional functionality in this area for an upcoming release.