Feature Guide:
Event Session Wizard

ONPOINT

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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.

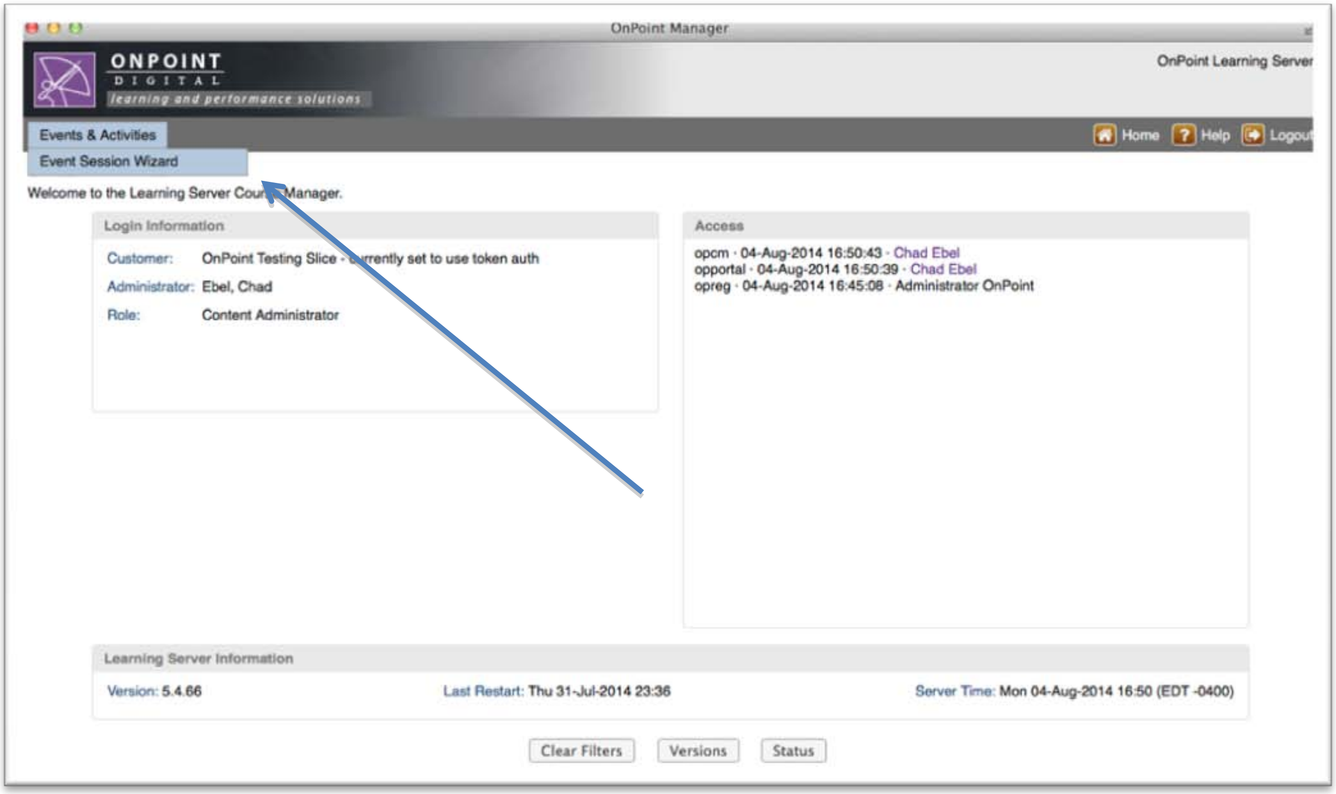
Note: Currently, only Root Administrators can access the Admin Matrix to restrict functionality within the Course Manager application by system role.

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.

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.

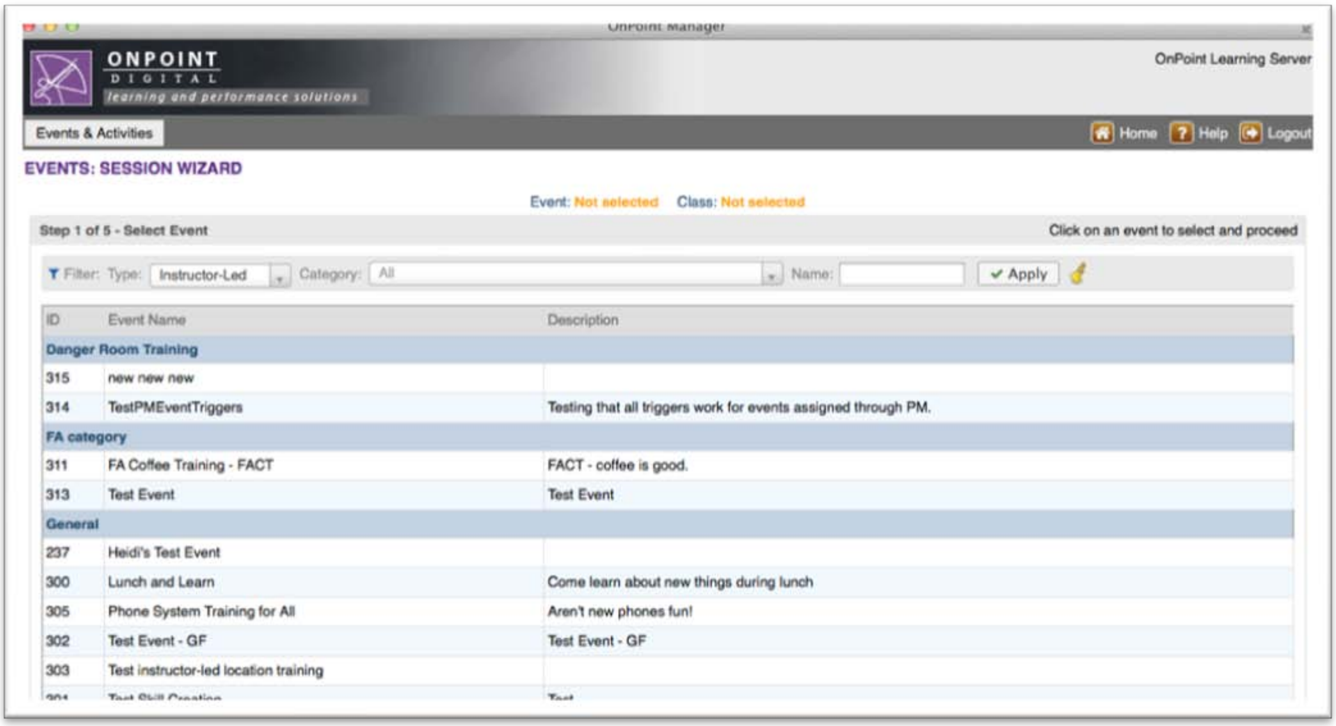

OnPoint Manager
ONPOINT
DIGITAL
learning and performance solutions
OnPoint Learning Server
Events & Activities
Event Session Wizard
Home
Help
Logout
Welcome to the Learning Server Course Manager.
Login Information
Customer: OnPoint Testing Slice - currently set to use token auth
Administrator: Ebel, 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.

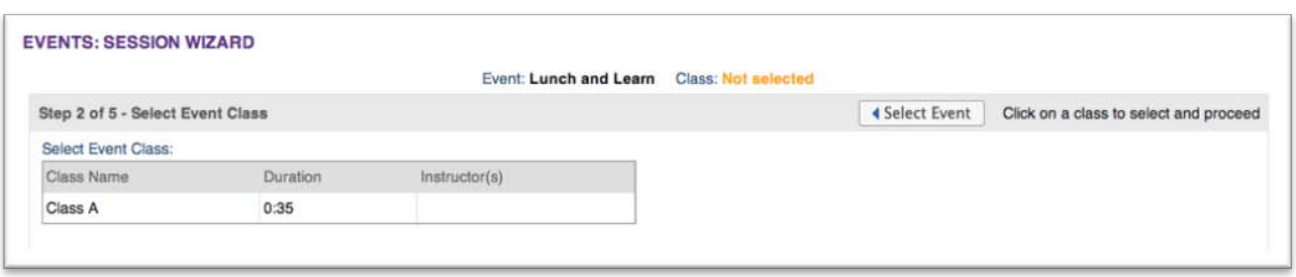
Step 1 – Select Event

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.



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.



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

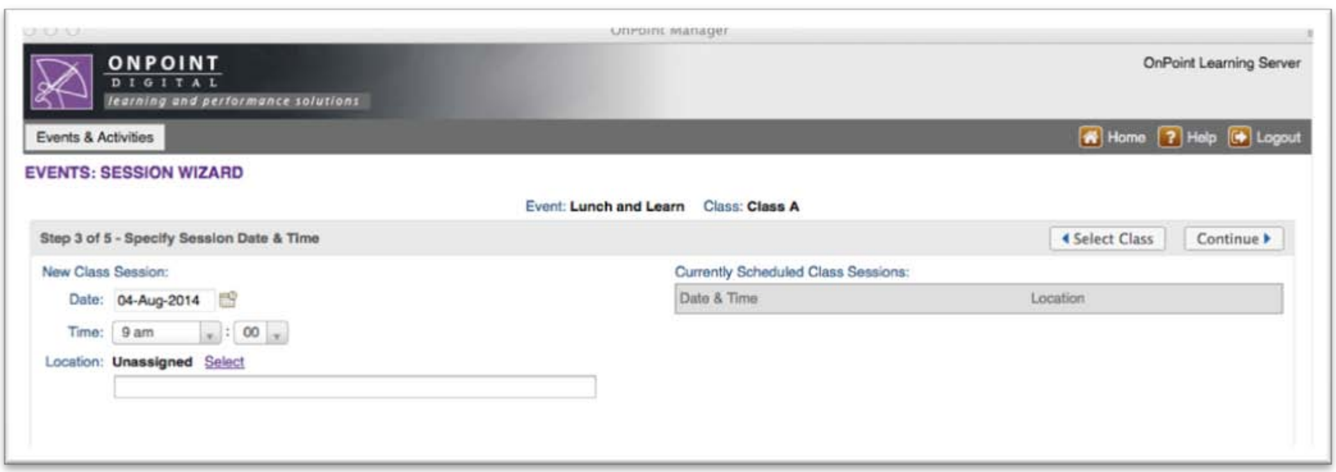
The next step is to set up the new Session being created. Notice the top of the page shows the Event and Class selections that have been made, in this example (Event: Lunch and Learn and Class: Class A). If for any reason you need to change the Class, use the Select Class button to move back a step in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

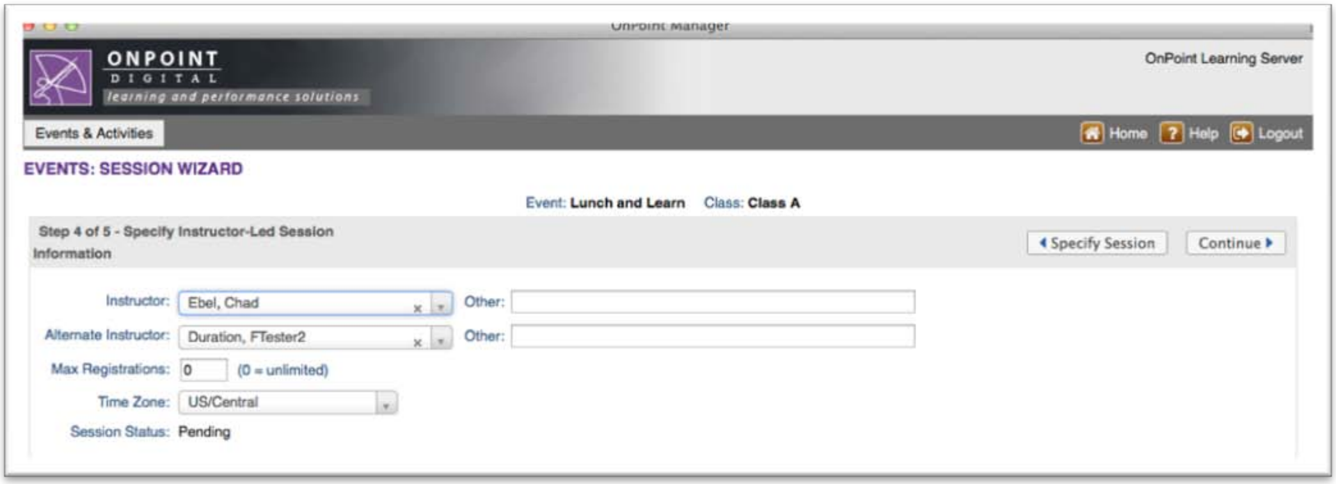


Set the Date and Start Time of the Session as well as the Location. Use the icon next to the Date field to open a calendar to easily select a date from. You can manually enter a time, or select from the drop-down options.

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

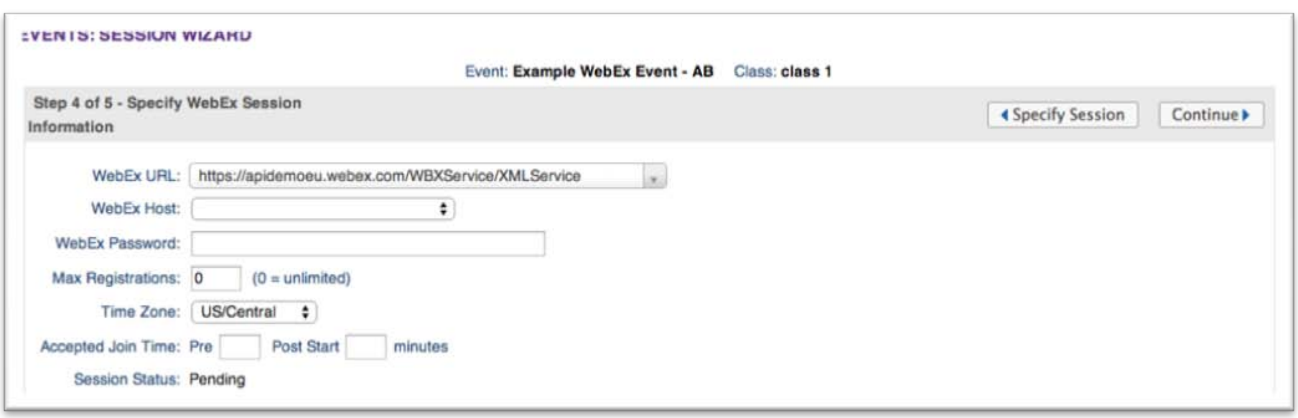
If you have selected an Event that is a Webinar type, the next step in the process will be to specify the URL link to display for connecting to the webinar.

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.



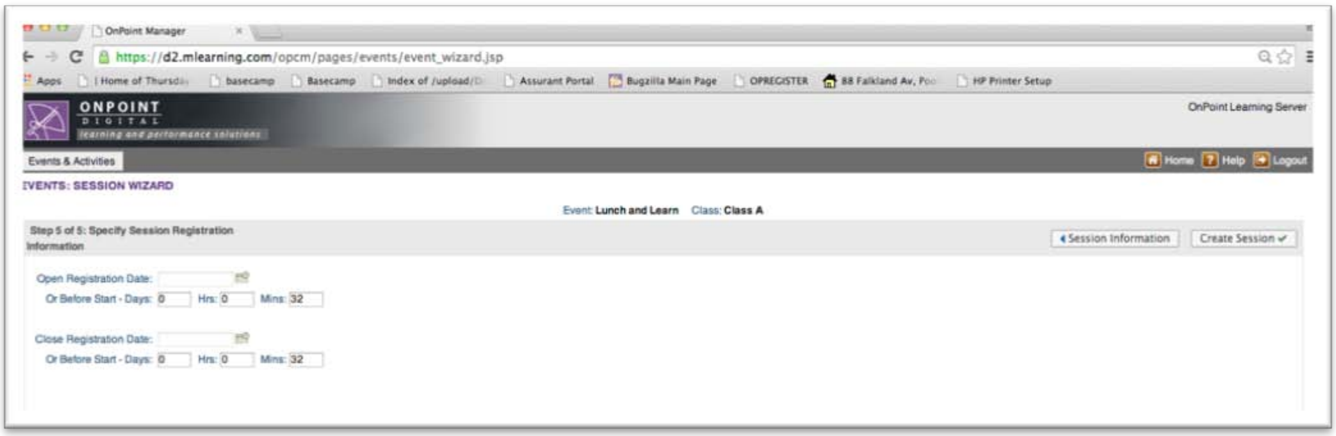
Again, the Session Status will be set as 'Pending' until it is approved.

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.



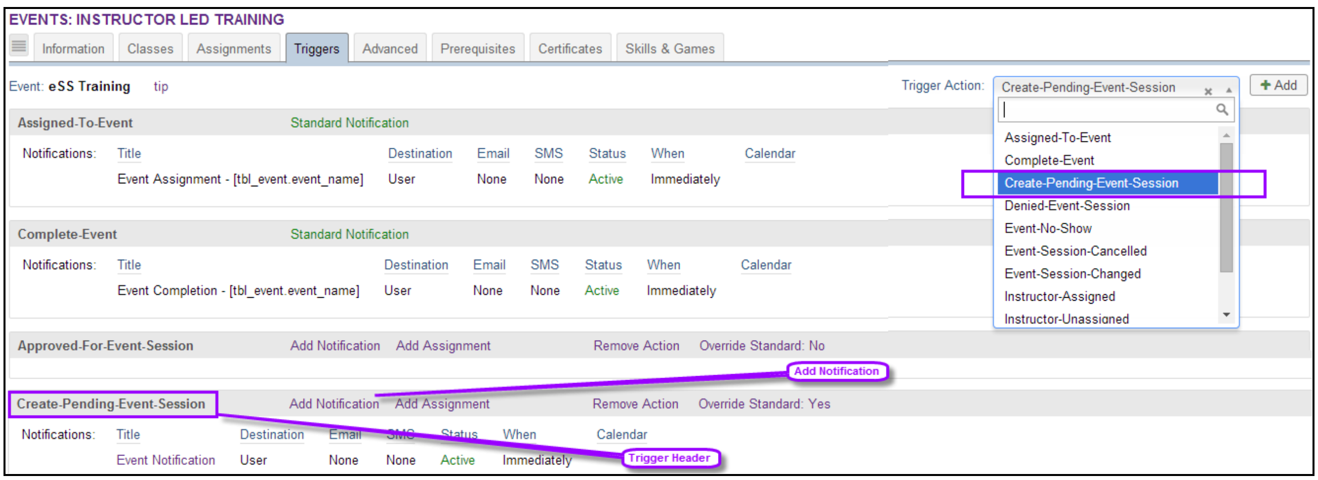
Section 3: Associated Notifications

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.

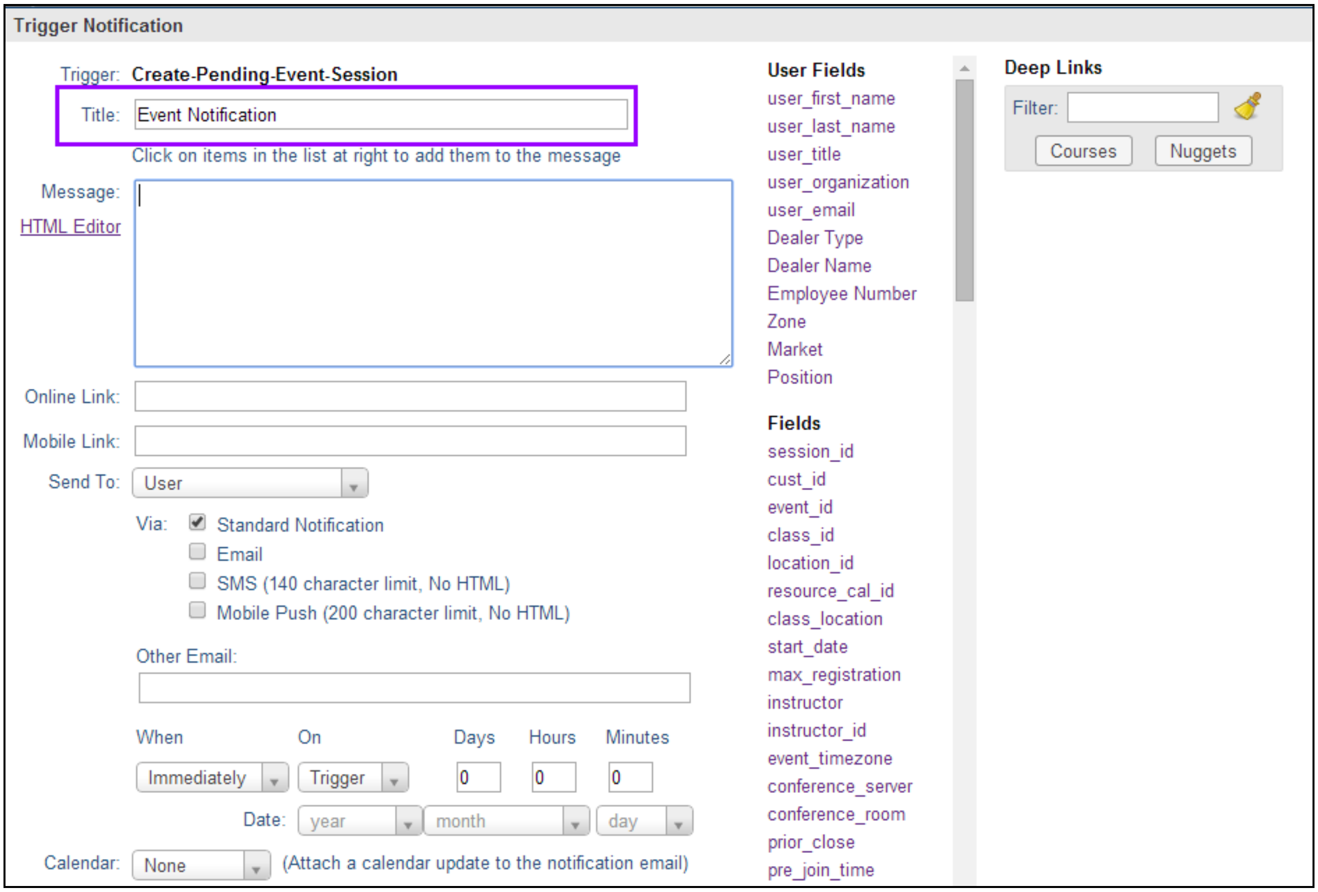
[There is no trigger for Event Session Approved at this time.]

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.

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.



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.



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.

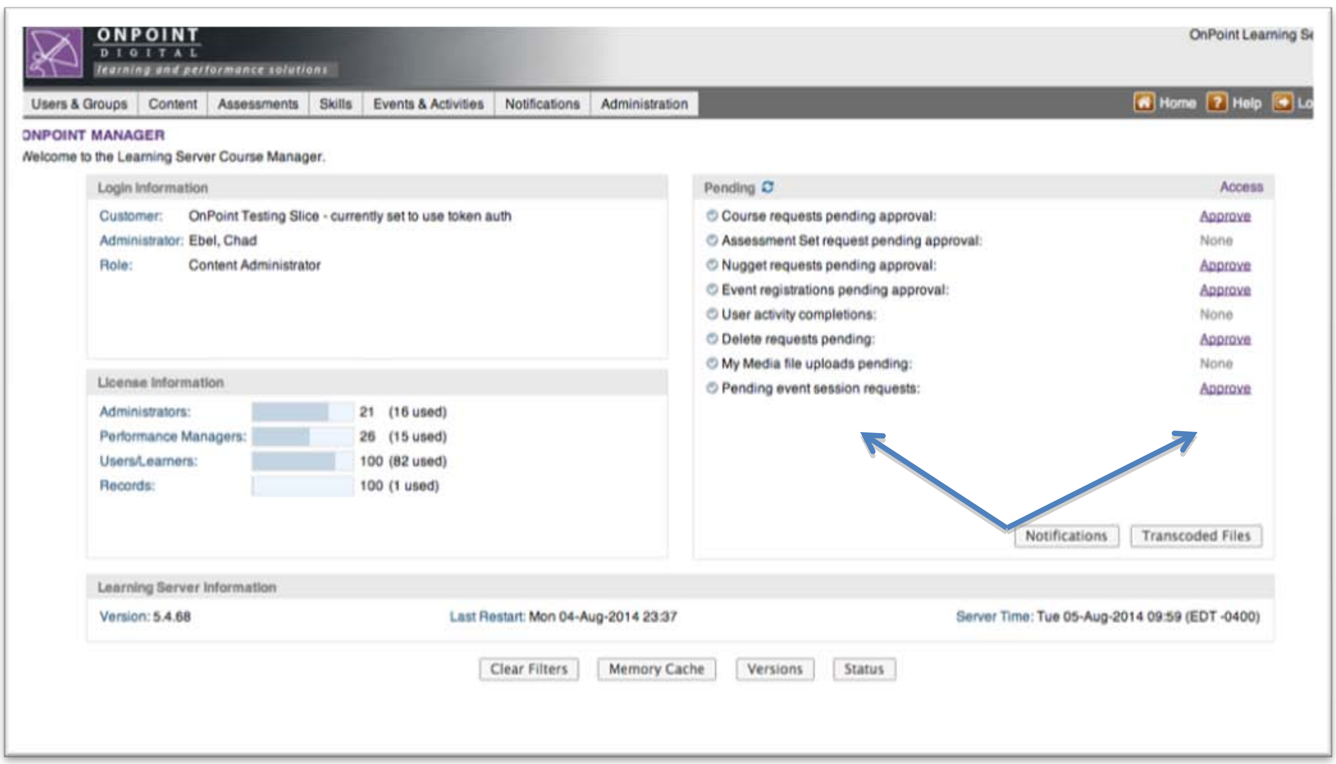
Section 4: Event Session Approvals

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.

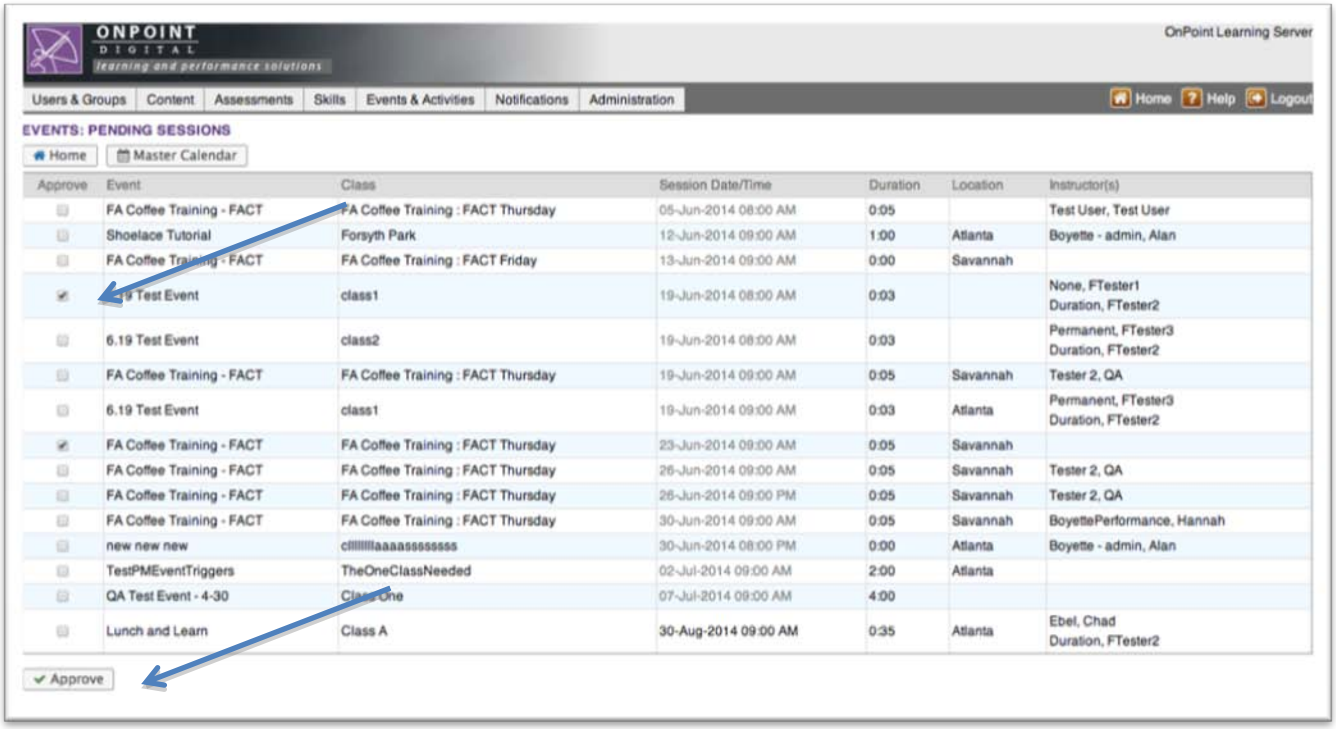
Step 1: Locating the Pending Event Session Requests

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.



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.



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.