OnPoint Course Manager:

Section 5
Events and Activities

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5.0 Events & Activities

In addition to helping organizations with their online e-learning training and organizational development practices, OnPoint's Course Manager platform also helps these same organizations to plan, manage and deliver their traditional, offline Instructor-Led Training (ILT) courses as well as organize webinars/web meetings and other live streaming sessions they may have as part of an overall blended learning approach. We refer to these as "Events". In truth, most organizations come to the realm of online learning after years of experience in the "offline world" where traditional classes taught by professional instructors educate their associates "cradle-to-grave:" from job orientation, to job responsibilities, to retirement or job outplacement.

As the global economy expands and organizations of all sizes find themselves lean and far-flung, finding ways to manage all of the training efforts in a consistent and effective manner becomes a paramount concern for any learning organization. Accordingly, OnPoint's tightly-knit approach marries all training/development status information about any User/Learner within that organization into one integrated platform that can track organizational learning at the individual, group or enterprise level through any training medium – online or offline.

The **Events & Activities** functionality covered here represents the more traditional Learning Management System (LMS) features found within OnPoint's Course Manager application. All Event-related assignments made to Users/Learners (e.g., attending an ILT session, accessing a webinars, viewing a live streaming event) are tracked in the same progress and performance schema as the online Courses and Assessments assigned to these same Users/Learners. In fact, most organizations are increasingly using online elements to supplement and support their offline training sessions; this would commonly include (A) an online pre-test taken before attending an ILT session or webinar, (B) an online preparatory Course completed to better prepare a User/Learner before they attend a live training session, (C) an online post-session Assessment or Survey that measures their knowledge and retention of materials covered in an ILT, webinar or live streaming session, and (D) an online refresher or supplemental training Course distributed to ILT Users/Learners weeks or even months after their classroom session, used to reinforce or enrich their base knowledge.

The Activities functionality represents the solution's ability to track external actions assigned to (and tracked for) learners, normally as part of a detailed learning path or competency to achieve.

5.0.1 Events & Activities: Event Structures

OnPoint's Event functionality provides unique support for all three Event types mentioned above: ILT, Webinars and Live Streaming Sessions. Organizations can create and manage these offline classes/sessions as either a single occurrence Event (e.g., one class/session occurring on one day for one time only) or as a recurring Event (e.g., the same class/session conducted the first Monday of every month). Event completion can also be tied to a User/Learner attending more than one Class for a given Event (e.g., successful completion of an Event requiring attendance at three separate Classes comprised of all-day sessions Monday, Tuesday and Wednesday). Finally, to streamline registration and attendance tracking, OnPoint's Event functionality makes it easy for both Managers and Users/Learners (if permitted) to find and select the Events, Classes and Sessions that best meet their availability and location preference.

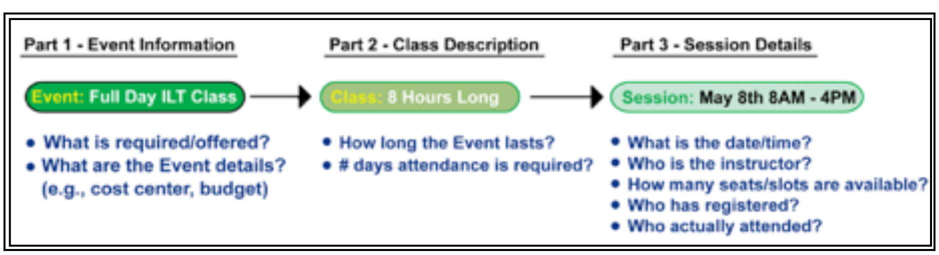


Figure 5-1 – Events & Activities: Event Structure

No matter what type of Event you need to create and manage, the basic Event structure is the same. As depicted above, every Event consists of 3 parts; the Event Information, the Class Description, and the Session Details;

when creating or editing any Event, Administrators must ensure that all of the necessary information has been provided for all three parts of the Event definition.

- **Part 1 – Event Information** helps to define what sort of Event is being offered and details what each Learner earns by successfully completing that Event.
- **Part 2 – Class Description** defines how much time/effort it will take to successfully complete the Event. Events may have one or several Classes defined, framing the number of days or unique classes a Learner must attend in order to get credit for the top-level Event.
- **Part 3 – Session Details** represent the specific dates, times, locations and assigned instructors who will be conducting an Event (or any thereof).

To better understand the differences between the three parts, the bullets listed below each distinct part above show which questions are answered at each level of Event definition.

When creating or editing an Event, the Administrator is required to enter detailed information into the displayed database fields.

As outlined below, each of the three parts provides Event specifics that frame the structure and delivery of that Event. Part 1 - **Event** information is considered very high-level and mostly used to manage the expected outcomes while Part 3 –**Session Details** is very specific to a time and place and the Learner's actual registration and attendance of that assigned Session.

The example shown below represents the basic three-part structure with one Event (what: a fire safety Course), one Class required to get credit for that Event (how long: 8 hours on Safety 101) and just one Session offered for the defined Event-Class (when/where/who: Thursday at 8AM in Training Room #6 with Instructor Alice Rabbit). Learners who register and attend the June 8th session (and pass any associated Assessments if included) can then earn credit for the Fire Safety Event.

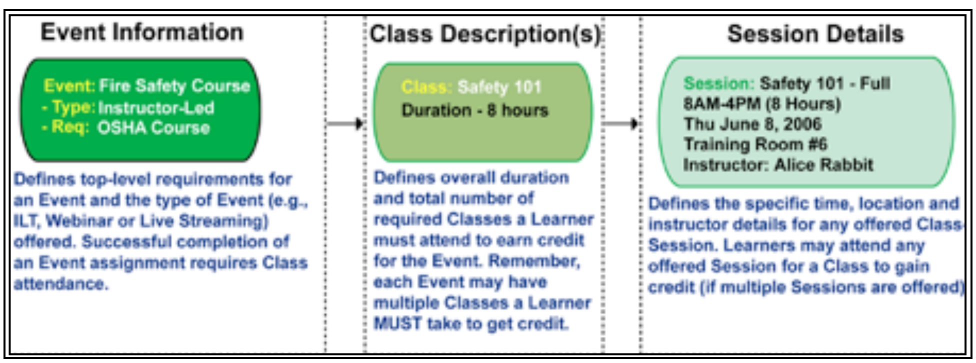


Figure 5-2 – Events & Activities: Event Information

While this simple 3-part, one-to-one-to-one structure works for the example above, the larger the organization, the more requirement there will be for modifying the structure of an Event in terms of the number of available Sessions and the numbers of Classes that must be completed in order to get credit for the Event assignment. The next example shows a sample Instructor-Led Training Event on Forklift Safety that consists of one 4-hour Class. Due to the number of employees who must be certified annually to ensure OSHA compliance, this Forklift Safety course is offered at two different times or Sessions. Learners can select which of the two offered Sessions best fits their schedule and availability. Any assigned Learner attending (and passing) either Session will satisfy the single Class requirement and overall Event requirements.

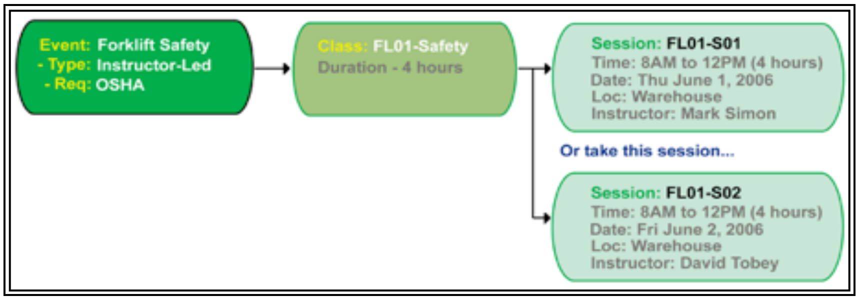


Figure 5-3 – Events & Activities: Event Example

Finally, to demonstrate another layer of flexibility, this next example shows a typical New Hire Orientation ILT Event that is held for all new associates on the first Monday of every calendar month and generally occurs over a 3-day period ending on Wednesday. The structure of the Event includes 3 Classes, one on Monday, Tuesday and Wednesday respectively. While the Monday Class is a full-day Session, the Tuesday and Wednesday Classes are only 4 hours in duration due to the fact that a large amount of paperwork needs to be handed out, filled out and collected during the Sessions so they are kept shorter and smaller than the General Class held on Monday. To give New Hire Event Attendees and their Managers some flexibility, the Tuesday and Wednesday Classes are offered either in the morning from 8AM until noon or after lunch from 1PM until 5PM. New Hires must attend the Monday session, plus one Session on Tuesday and one on Wednesday to get credit for the event.

One of the other advantages of the OnPoint Event structure is the fact that if a New Hire Event Attendee misses one of their required Sessions – for example, either the morning or afternoon Session for the Wednesday Class #3 – they can make up their Session absence by attending a future Session (provided space is available). Since all Session Details are related to specific dates, times and locations, attending any Session for the required Class --either in the current Class Series or any future Class series – satisfies the attendance requirements for the overall Event. Administrators can configure Event records to allow Users to change their own Session assignments if they wish to allow that flexibility, or can restrict any rescheduling to Administrators and Event Managers only.

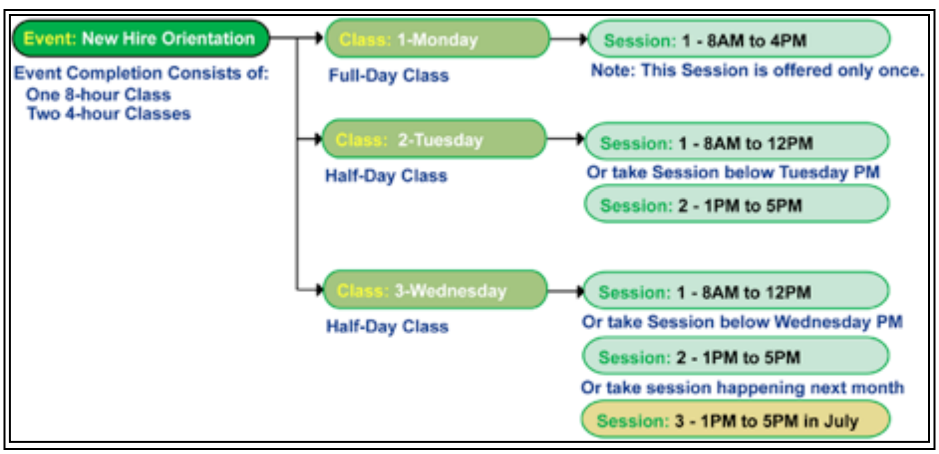


Figure 5-4 – Events & Activities: Event Example 2

Note: Instructors who have an OnPoint Reporting Manager license can view individual User attendance as well as run reports on Class Attendance. Instructors who have a Group Manager license can also make individual user assignments and schedule changes.

5.1 Events & Activities: Functions

Course Manager includes a fully functional Event creation and registration system that allows Root and Site Administrators and Event Managers to schedule, assign, announce, and manage all of their **Events & Activities** for their Users/Learners and Managers. To access these functions, select the Events & Activities tab from the Course Manager menu. When selected, this primary-level menu opens to reveal several submenu options that provide direct access to all **Events & Activities**-related functions within the Course Manager system.

The **Events and Activities** dropdown menu displays the following selections:

- **Master Event Calendar** - This selection allows Administrators to see a calendar view of all upcoming Events, including classroom training, web-based training, and live streaming events.

- **Instructor-Led** - This selection produces a table listing of all ILT-related Events currently defined and managed in Course Manager. From the table list, to open or edit any ILT Event record, click on the **Instructor-Led Training Event**.

- **Webinars** - This selection produces a table listing of all Webinar-related Events currently defined and managed in Course Manager. From the **Events: Webinar** page, select any webinar you wish to open or edit the webinar event record. Unlike the Instructor-Led Events described above, Webinars have additional fields where web addresses/URLs are defined to automate the process of launching Webinars for Learners attending these Events.

- **Event Session Wizard** - This selection provides access to an Event Session Wizard that will make it easier to transcode files, convert PowerPoint presentations to online or mobile delivery, create events, etc.

- **Resources** - This selection produces a table listing of all resource names, locations and actions that are available to be used and can be scheduled out for an event by an instructor. This option will also allow additional resources to be added to the list.

- **Registration** - This selection provides a list of all Event Registration Requests (ILT, Webinar or Live Streaming) that are pending Administrative approval. Requests are listed in reverse date order (most recent first) and the displayed list includes the User, Event requested, class, session, maximum seats, available seats, and the Date and Time of the Registration Request. An Administrator may approve, deny, or remove (disapprove) the Request via a simple radio button. This function is also available for an Administrator from the Home page of Course Manager where any Pending Requests would be noted.

- **Event Locations** - This selection produces a listing of all locations that have been added for Events. It is a tiered approach and can have a parent location and then children that are underneath these locations. For example if there is a Western Region and that region has 4 main offices the parent would be the Western Region and the children locations under the parent would be the 4 individual offices.

- **Activities** - This selection provides a list of all defined Activities in the shared repository. Activities are formal assignments that supplement a user's online and ILT assignments, such as attending a seminar or completing an industry certification. The list displays Activities alphabetically by Activity Name, organized by Category, and includes Activity Type and Status. Specific Activity detail is accessible by clicking on the **Activity Name** link.

- **Activity Completion** - This selection displays a list of all Activities and the User Names and Status of each. Activities are listed alphabetically by Activity Name, and can show "All" Activities or be filtered on just a selected Activity. The list can also be filtered for "All" Users or just a specific User. Managers may update individual Users' records by clicking on the specific User name link and updating the record.

- **Reports** - This link provides preformatted Reports used by administrators to report on Events-related data.

5.1.1 Events & Activities: Master Event Calendar

The Master Calendar view allows Administrators to see a calendar view of all upcoming Events, including Instructor- Led training, and Webinar training. Standard filters allow the Administrator to see all Events at a particular location, or taught by a particular instructor, or both. Additional display options provide a weekly view or a list view.

Master Calendar Filters
To use the Master calendar filters, use any combination of filters detailed below.

Events & Activities: Master Calendar	
Element	**Description**
Name:	Enter any word(s) included in the Event name to display only those Events. Click Enter on your keyboard or the **Apply** button to show the filtered results.
Location:	Use the drop-down Location list to filter by Location. Only one location may be selected at a time, or select **'- all-'** to show all Events at every Location. [Locations may be established at Events & Activities -> Event Locations.]
Instructor:	Use the drop-down Instructor list to filter by Instructor. Only one Instructor may be selected at a time, or select **- all-** to show Events taught by all Instructors. [Instructors may be established under Users & Groups -> Users by setting the Instructor setting to 'Y' for any User on the User Information tab.]
Status:	Use the drop-down Status list to filter by the event status. Only one status may be selected at a time, or do not select an option to view events with any status. The options for a status are Approved or Pending.
Display Time Zone:	Use the drop-down time zone list to display all events in the master calendar in accordance with the selected time zone. Default is US/Eastern time zone.

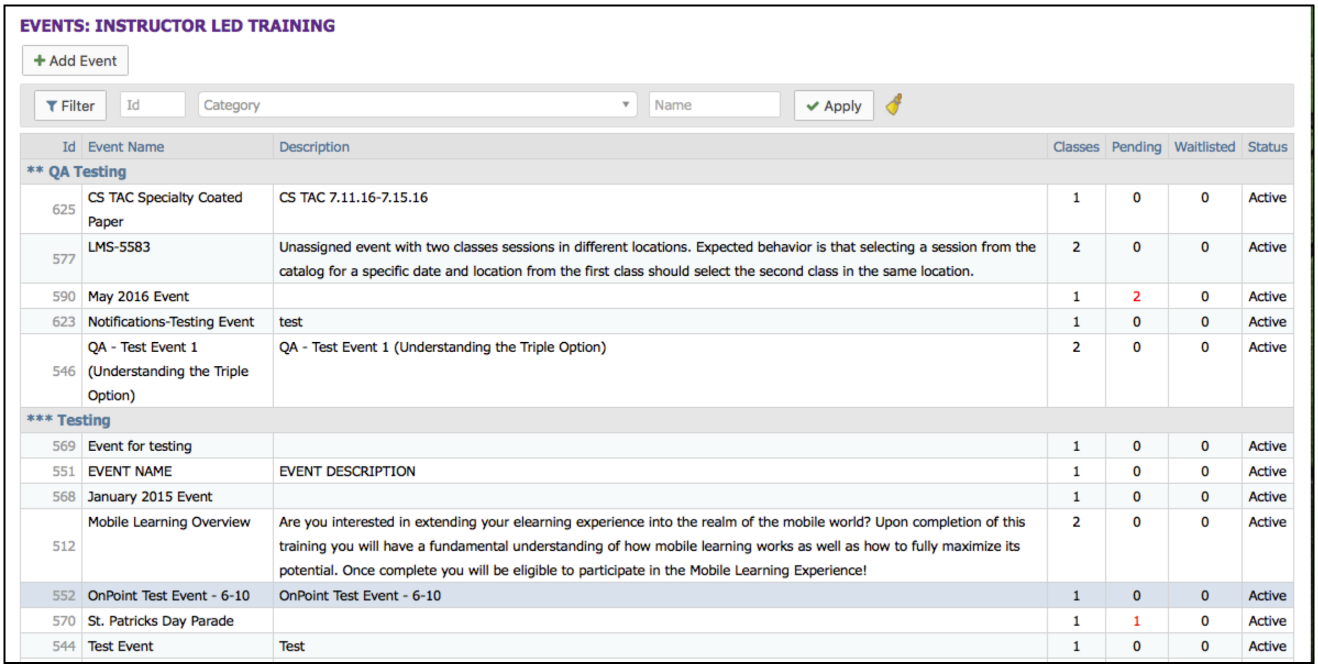
You may also change the Event calendar display by applying other filters available after selecting the “More” button on the upper right. This will show more filter options for calendar events such as selecting resources, or a specfic coordinator from the drop-down lists.
Master Calendar Views
To display the calendar by week or in a list view, select the desired option from the drop-down list in the bottom right. Use the **'(Previous date)'**, '**Today**' and **'(Next date)'** buttons above and to the right of the master calendar to help you navigate.

Select the on the right side to print the Master Event Calendar in the view you have selected.

5.2 Events & Activities: Table Display All Events

The first two items after the Master Events Calendar under the **Events and Activities** dropdown menu are Instructor-Led and Webinars. If you select either of these, the first screen displays the database listing of all current Events of that type that are defined and managed in Course Manager. All events are listed in alphabetical order and arranged in order of their assigned Category. From this display, you may:

1. Select an Event record from the List to review or edit by clicking on the Event;
2. Read Event Descriptions, confirm the number of Classes assigned, determine Pending Registration Requests, check if there are any waitlisted, or check the status of the event.
3. Click the **Add Event** button to create a new event;
4. Click the **Filter** button to narrow the displayed list of Events by Name, Category or other criteria available.


EVENTS: INSTRUCTOR LED TRAINING

+ Add Event

Filter | Id | Category | Name | Apply

Id	Event Name	Description	Classes	Pending	Waitlisted	Status
** QA Testing						
625	CS TAC Specialty Coated Paper	CS TAC 7.11.16-7.15.16	1	0	0	Active
577	LMS-5583	Unassigned event with two classes sessions in different locations. Expected behavior is that selecting a session from the catalog for a specific date and location from the first class should select the second class in the same location.	2	0	0	Active
590	May 2016 Event		1	2	0	Active
623	Notifications-Testing Event	test	1	0	0	Active
546	QA - Test Event 1 (Understanding the Triple Option)	QA - Test Event 1 (Understanding the Triple Option)	2	0	0	Active
*** Testing						
569	Event for testing		1	0	0	Active
551	EVENT NAME	EVENT DESCRIPTION	1	0	0	Active
568	January 2015 Event		1	0	0	Active
512	Mobile Learning Overview	Are you interested in extending your elearning experience into the realm of the mobile world? Upon completion of this training you will have a fundamental understanding of how mobile learning works as well as how to fully maximize its potential. Once complete you will be eligible to participate in the Mobile Learning Experience!	2	0	0	Active
552	OnPoint Test Event - 6-10	OnPoint Test Event - 6-10	1	0	0	Active
570	St. Patricks Day Parade		1	1	0	Active
544	Test Event	Test	1	0	0	Active

Figure 5-5 – Events & Activities: Events-All

	Note: Given the basic structure and composition of all Instructor-led Training Events is very similar to that of the Webinar Events to follow later in this Help Guide, most instruction needed to learn any one type of Event is directly related to learning the other type of Events. Accordingly, throughout this section, the term "Events" is generally applicable to Instructor-Led or Webinar Events unless otherwise noted.

The Event list displays the following:

Events & Activities: Events Table Display	
Element	**Description**
Event Id:	Indicates the unique Event Id that was automatically assigned to the Event when it was created. Event Ids are issued once and never reused.
Event Name:	The assigned name of the Event. **Tip:** Always include a Category when creating an Event. Later, that will make it easier

	to find the Event you are searching for from the main Event list, since Event Names may be similar.
Description:	Provides a brief description of the selected Event. This description will display to Users/Learners in the Event Calendar, the Event Information Page, and via a Portal search.
Classes:	Displays a numerical value that summarizes how many distinct Classes a User/Learner must attend to gain credit for the Event.
Pending:	Displays a numerical value that summarizes the total number of Event Registration Requests pending approval by an Administrator.
Waitlisted:	Displays a numerical value that indicates the total number of Users who are waitlisted for the Class/Session. In the event a seat becomes available, waitlisted users move into the available seat on a first-come first-serve basis.
Unassigned Sessions:	This indicates the number of users who are assigned the Event but are missing a session assignment.
Status:	Shows the current status of the Event record (**Active**, **Inactive**, or **Deleted**) if the Filter is set to Display "All" status conditions.

Other Event: List - Related Information:

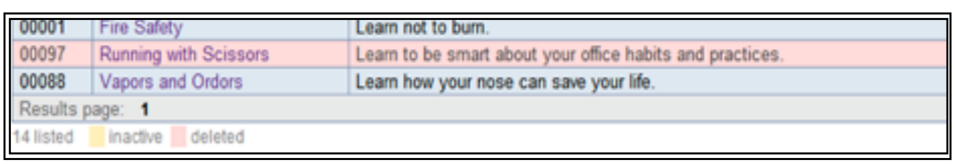
A few additional features can be found on the Event List Screen:

A. **Results Page Listing** – Event Lists with more than 50 records are separated over multiple pages. These pages can be navigated using the Results Page Listing at the bottom left of the Event List screen. Pages can be accessed by the numbered pages, or navigating through using the Next arrows.

B. **Event Count** - At the bottom left of the Events & Activities: List table is a count of the Events listed in your Course Manager database; the number will include inactive and requested delete events if you have set your filter to display all status types.

C. **Color Keys** – Events listed in the Event List table are considered "Active" but may be flagged as "**Inactive**" or "**Request Delete**" by an Administrator. When any defined Events have been flagged as either "Inactive" or as "**Request Delete**", the updated Event record will appear in a **Yellow** highlight color indicating that Event record has been marked as "**Inactive**" or will appear in a **Pink** highlight color indicating that Event record has been marked as "**Request Delete**".

	Note: The list filter defaults to show Active Events; in the filter status field, de-select Active to view all Events.



00001	Fire Safety	Learn not to burn.
00097	Running with Scissors	Learn to be smart about your office habits and practices.
00088	Vapors and Ordors	Learn how your nose can save your life.
Results page: 1		
14 listed inactive deleted		

Figure 5-6 – Events & Activities: Event List Screen

5.2.1 Table Display- All Events: Add an Event

To create a new Event, click the appropriate type of Event (Instructor-Led or Webinars) on the **Events and Activities** dropdown menu. This selection displays the database listing of all currently defined Events of that type in Course Manager. To add a new Event, click the **Add Event** button at the top left. A blank Event record will display. Complete the following data fields that are appropriate:

Events & Activities: Add an Event	
Element	**Description**
Event Type:	States the Event Type for the selected Event. This field cannot be edited, and will read **"Instructor-Led Training"** or **"Webinar"**.
Event Name:	Enter the name of the new Event. **(Required Field)**
Description:	Provide a brief description of the selected Event. This description appears to Users on the Event Information Page, in the Event Catalog (if enabled for this Event; see "In OPCV Event Catalog" field below) and via a Portal search.
Synopsis:	Provide a more detailed summary of the selected Event if desired. This summary appears to Users on the Event Detail of an Event assignment, and on the Event Registration Page.
Category:	Select a Category to help in Event organization and searching.
Webinar Type:	This flag indicates integration with Adobe Connect or WebEx systems for event registration and reporting.
Require Approval:	Indicate whether the Course requires instructor or manager approval. Select the option that best fits this Event. • Yes = Requires Approval • No = Does not Require Approval If you mark an Event as 'No', Users may select it (if it is included in the Catalog) and self-register for it without Manager approval.
In General Catalogs:	Indicate whether this particular Event will be available for Users to see and request access to through the Event Catalog. The Catalog allows Users to self-register for Events they are interested in that don't require approval, and request registration to those Events that do require Approval. In this case, their status will be pending until a Manager approves their request.
In OPEC Catalog:	Indicate whether this particular Event will be available for Users to purchase through the e-Commerce Catalog. The Catalog allows Users to register for and purchase Events made available, and request registration to those Events that require Approval. Requires purchase of optional OPEC module.
OPPM Assignable:	Select whether Group Managers can assign this Event to their users.
Auto Assign Sessions:	Allows a manager to set up the system to automatically assign users to available sessions or not. • Select **Yes** to indicate that Users will be automatically assigned to the next available (future) session of that Event (unless all sessions are full, in which case, they will be assigned to a Waiting List) • Select **No** to leave all newly assigned users in the Missing Sessions (unassigned) bucket. From there they can be assigned to any session by a manager.
User Select Sessions:	This field indicates whether or not a User can select or change/update their Event

	Session selections. • Select **Yes** to allow users to see a list of upcoming Sessions for the Event they are registered for, and to select an alternate Session(s) to attend. • Select **No** if you wish users to be assigned to the first available Session for each Class for the Event they are registered for. Users will not see a list of other available sessions that may be being held.
User Change Sessions:	This field indicates whether or not a User can change/update their Event Session selection.
Allow User Rating:	This flag sets whether or not a user can rate this Event.
Assigned Survey:	This field allows an Admin to select a general survey to be associated with this event. This field works in conjunction with user ratings so that when these are flagged, a user can go into OPCV and provide both a rating and comments after an Event has been completed.
Credit Hours:	Enter the number of credit hours associated with the Event.
OPPM Recommendable:	This Yes/No setting allows an Admin to say whether or not a Performance Manager can recommend this Event to their managed users.
Use Seat Allocation:	If this field is set to Yes, the system will auto-fill a user assignments up to the allotted seat allocation and all additional attendance requests will put those users on a waitlist.
No Session Notification:	This helps an Admin create a Trigger to remind users who have unassigned sessions to choose an available session. Choose the number of days from the date of the assignment that the first notification should go out.
No Session Notification Interval:	Choose the number of days between reminder notifications.
Status:	Indicates the Status of the Event. • **Active** (Event in use) • **Inactive** (Event not in use) • **Request Delete** (Event no longer needed)
Custom Fields: (up to 10)	Displays fields for the collection of up to 10 different pieces of additional information about the Event. Establishment of these fields is handled under the Administration -> Custom Fields menu.

After making your entries, click one of the following:

Save	To save any changes made.
Cancel	To cancel the action and exit this page without making any changes.

	Note: Most of the Event data fields are optional. You may create a new Event simply by providing the required field and allowing the system defaults to apply. You may return later to edit the Event data at any time.

5.2.2 Table Display- All Events: Edit an Event

To edit an existing Event record, select it from the table listing by clicking on the Event. The **Event Information** sub-tab will display the general Event information.

Notice that you now see **Hide** or **Edit** links for the Synopsis message that will allow you to edit the message.

Several Action Buttons appear across the center of the screen.
Event Action Buttons include:

Events & Activities: Action Buttons	
Action Button	**Description**
Edit	Allows you to view and edit the data fields for the selected record.
Refresh	Refreshes the web page with all recent updates (if needed).
List	Returns you to the Events and Activities List.

Notice that the record's '**Created**' and last '**Updated**' dates are displayed at the lower left of the page. Click the **Updates** link for a list of dates this record has been edited, and by whom. Click the **Edit** button to edit the Event, then select from the buttons below when you're finished.

At any time you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

5.2.3 Table Display- All Events: Delete an Event

To make an existing Event "Inactive," or mark it for deletion, select **Events and Activities** from the main Course Manager drop-down menu system and select either Instructor-Led or Webinar. Select the Event you wish to change and when the Event record is displayed, click the **Edit** button.

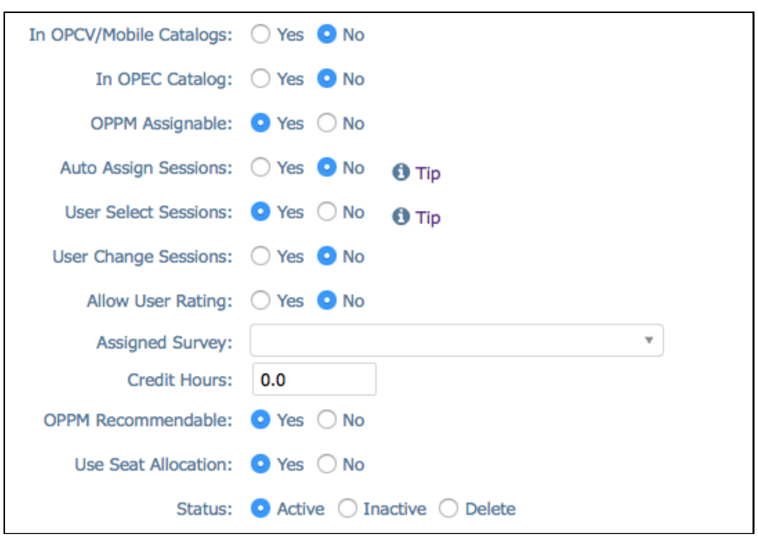


Figure 5-7 – Events & Activities: Delete an Event

From the **Events: Event Edit** screen, at the Status field, select Inactive or Request delete from the radio buttons. Click the **Save** button to activate your change. The Status field will now show the changed status.

Click the **List** button to return to the Event List.

The Event will now appear highlighted in **Yellow** (for **Inactive** status) or in **Pink** (for **Request delete** status) in the Event List (if the Filter is set to show all status conditions in the display) to alert others as to the status of the Event record.

Note: Deletion tasks can only be performed by a Site or Root Administrator. When an item's status is changed to Request delete, an Administrator reviews the request to ensure there is no need for it before performing the delete function (Administration tab > Deletion Tasks option).

5.3 Events & Activities: Sub Tabs

To view an **Event** record, select the Event you wish to view from the list of Events and the record for that Event will appear. The displayed record provides a detailed description of the Event and organizes this information across eight Submenus/Tabs as follows:

- **Information** - Tab 1 "Information" provides the high level information about a selected Event including fields for Event Name, Description, a detailed Synopsis, the Category assignment, approval conditions, catalog display conditions, and current Event record status. In addition, this screen can contain up to 10 Event-related custom fields that help to better classify and manage an organization's Events.

- **Classes** - Tab 2 "Classes" presents a listing of all of the defined Classes created as part of this selected Event. The Classes Submenu/Tab allows Administrators to add or edit any Classes or their related Sessions, review any Class and Session details, and drill down into the session specifics including scheduling and registration information.

- **Assignments** - Tab 3 "Assignments" shows all the current Assignments for this Event, including the Event/Session Coordinators who have oversight over registration tasks for this Event, plus assigned Users or Groups/Job Codes for the Event.

- **Advanced** - Tab 5 "Advanced" is where you will set up any advanced features for your Event. These settings are all optional, and global default settings may apply.

- **Triggers** - Tab 4 "Triggers" allows you to define an automated system action upon occurrence of specific Event conditions.

- **Prerequisites** - Tab 6 "Prerequisites" allows Administrators to establish any requisite assignments they want Users/Learners to complete before accessing this Event. Prerequisites can be any object type in the system (Course, Assessment Set, Nugget, Event, or Activity).

- **Certificates** - Tab 7 "Certificates" allows you to select a certificate design for the specific event from a list of Event-specific certificates stored in the system Library.

- **Games** - Tab 8 'Games' allows you to associate Game Points with the Event.

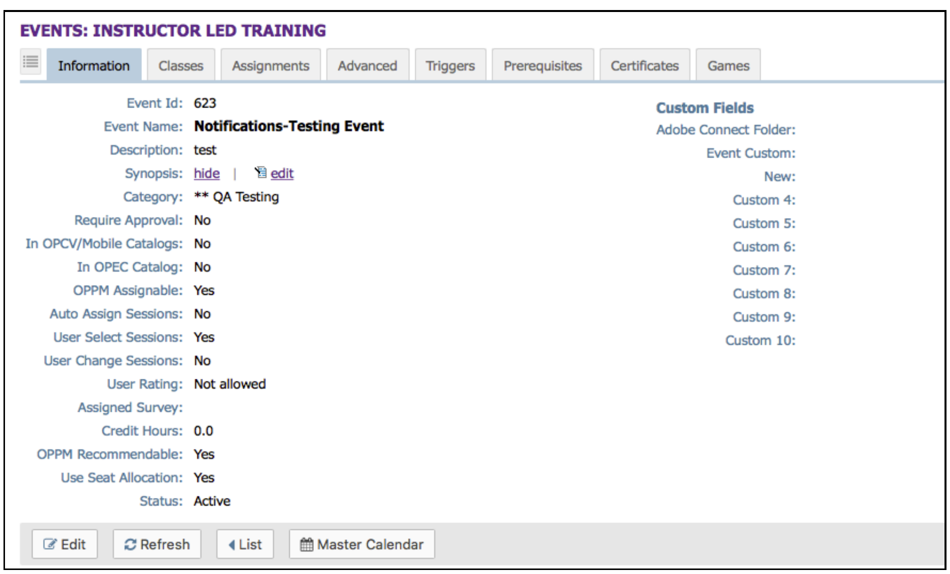


Figure 5-8 – Events & Activities: View an Event

<u>Other Event: Record Features:</u>

A few additional items can be found at the bottom of every Event record information sub-tab, including the following Action Buttons.

Action buttons are located about midsection down the screen, allowing you to Edit, Refresh, and Return to the Events List.

Edit	Allows you to view and edit the data fields for the selected record.
Refresh	Refreshes the web page with all recent updates (if needed).
List	Returns you to the list of users.
Master Calendar	Returns you to the Master Calendar.
Forum	This field lets you auto-create a forum to be associated with an Event Session group.
Parameters	Parameters are useful in creating custom logic scenarios to support user interface display.
Recertify	This function is used when the Event recertifies periodically (annual, every 3 years, etc.)

To edit/update an Event record, click the **Edit** button and the Edit screen will appear.

The following fields make up an Event record and can be Edited or Updated:

Events & Activities: Edit/Update Event Record	
Element	**Description**
Event Type:	States the Event Type for the selected Event. This field cannot be edited, and will read "**Instructor-Led Training**" or **"Webinar"**.
Event Name:	Enter the name of the new Event. **(Required Field)**.
Description:	Provide a brief description of the selected Event. This description appears to Users on the Event Information Page, in the Event Catalog (if enabled for this Event; see "In OPCV Event Catalog" field below) and via a Portal search.
Synopsis:	Provide a more detailed summary of the selected Event if desired. This summary appears to Users on the Event Detail of an Event assignment, and on the Event Registration Page.
Category:	Select a Category to help in Event organization and searching.
Webinar Type:	This flag indicates integration with Adobe Connect or WebEx systems for event registration and reporting.
Require Approval:	Indicate whether the Course requires instructor or manager approval. Select the option that best fits this Event. • Yes = Requires Approval • No = Does not Require Approval If you mark an Event as 'No', Users may select it (if it is included in the Catalog) and self-register for it without Manager approval.
In General Catalogs:	Indicate whether this particular Event will be available for Users to see and request access to through the Event Catalog. The Catalog allows Users to self-register for Events they are interested in that don't require approval, and request registration to those Events that do require Approval. n this case, their status will be pending until a Manager approves their request.
In OPEC Catalog:	Indicate whether this particular Event will be available for Users to purchase through the e-Commerce Catalog. The Catalog allows Users to register for and purchase Events made available, and request registration to those Events that

	require Approval. Requires purchase of optional OPEC module.
OPPM Assignable:	Select whether Group Managers can assign this Event to their users.
Auto Assign Sessions:	Allows a manager to set up the system to automatically assign users to available sessions or not. • Select **Yes** to indicate that Users will be automatically assigned to the next available (future) session of that Event (unless all sessions are full, in which case, they will be assigned to a Waiting List) • Select **No** to leave all newly assigned users in the Missing Sessions (unassigned) bucket. From there they can be assigned to any session by a manager.
User Select Sessions:	This field indicates whether or not a User can select or change/update their Event Session selections. • Select **Yes** to allow users to see a list of upcoming Sessions for the Event they are registered for, and to select an alternate Session(s) to attend. • Select **No** if you wish users to be assigned to the first available Session for each Class for the Event they are registered for. Users will not see a list of other available sessions that may be being held.
User Change Sessions:	This field indicates whether or not a User can change/update their Event Session selection.
Allow User Rating:	This flag sets whether or not a user can rate this Event.
Assigned Survey:	This field allows an Admin to select a general survey to be associated with this event. This field works in conjunction with user ratings so that when these are flagged, a user can go into OPCV and provide both a rating and comments after an Event has been completed.
Credit Hours:	Enter the number of credit hours associated with the Event.
OPPM Recommendable:	This Yes/No setting allows an Admin to say whether or not a Performance Manager can recommend this Event to their managed users.
Use Seat Allocation:	If this field is set to Yes, the system will auto-fill a user assignments up to the allotted seat allocation and all additional attendance requests will put those users on a waitlist.
No Session Notification:	This helps an Admin create a Trigger to remind users who have unassigned sessions to choose an available session. Choose the number of days from the date of the assignment that the first notification should go out.
No Session Notification Interval:	Choose the number of days between reminder notifications.
Status:	Indicates the Status of the Event. • **Active** (Event in use) • **Inactive** (Event not in use) • **Request Delete** (Event no longer needed)
Custom Fields:	Fill in from above.

5.3.1 Events & Activities: Classes

Once the top-level Event Information has been defined, Administrators and Event Managers need to create or update associated Class Descriptions and Session Details via the functions found on the "**Classes**" Sub-tab. As described previously, each Event has at least one Class and each Class must have at least one Session. Events that require a User/Learner to attend 2 or more classes will need to have a unique Class created for each. Similarly, the same Class that is offered on more than one occasion needs to have a corresponding Session created for each instance. In the example shown below, the Event titled "Business Process Analysis" consists of 2 different Classes each User/Learner must attend. Assuming today was May 13th at 5:00 p.m., the schedule will show the available sessions as follows: The first Class has 2 dates that are still available. The second Class has only one session remaining.

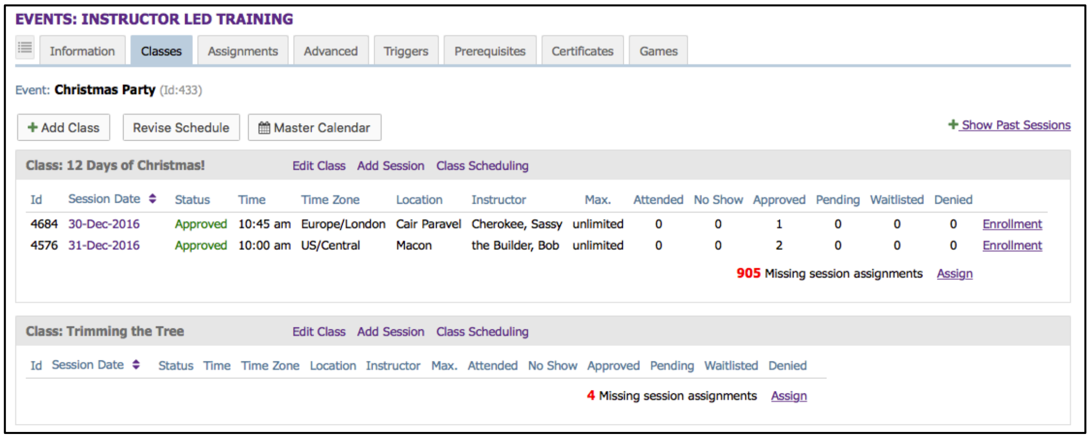


Figure 5-9 – Events & Activities: Classes

The **Event: "Classes" Submenu** has several functions including the following:

Events & Activities: Classes Submenu	
Element	**Description**
+ Add Class	Click this action button to create/define a new Class for the selected Event.
Revise Schedule	Click this link to view a listing of all Users/Learners (as well as all of their associated Event Sessions) currently assigned and approved to attend the selected Event.
Master Calendar	Calendar of all scheduled sessions by month.
Check Session Assignments: (link)	Performs a real-time system check to ensure an up-to-date schedule is reflected for this particular user. When this link is selected, you will not see any pop-up or results message. This action is similar to a "**Refresh**" in a browser.
Show/Hide Past Sessions: (link)	This toggle link, when clicked, will display a list of Past Sessions (prior to the current date). Re-click to return to a list of upcoming sessions.

Class Descriptions
To the right of each Class Name are three functional links shown in purple:

Edit Class: (link)	Displays the details of the class and permits edits for the selected Class.
Add Session: (link)	Click to add a new Session for the defined Class. Session details include the specific date, time and instructor or WebEx Host who will lead the defined Class Session. For convenience, much of the field information defined at the Class-level will default in the Session-level details but can be edited as needed to fit Session specifics.
Class Scheduling: (link)	Click this link to view a Session-specific listing of all Users/Learners currently assigned and approved to attend the selected Class.

Session Details
Under the Class Name is a list of all associated Sessions that have been entered. Two functions are available:

Session Date: (link)	Click this link to view/edit the Session details for the displayed date.
Enrollment: (link)	Click the link at the far right to review the status of all registered Users/Learners for the defined Session. Use this same screen to indicate/update Session Attendance or change approval status to Pending.

5.3.1.1 Classes: Revise Schedule (for User)

The **Revise Schedule** link allows Administrators and Event Managers to update both Class and Session specifics for Users/Learners who have been previously registered for an Event using an easy two-step process:

- Select User
- Select Session for that User

In Step #1, Administrators are presented with an alphabetized list of Users/Learners for the selected Event and pick the name they wish to update from that list.

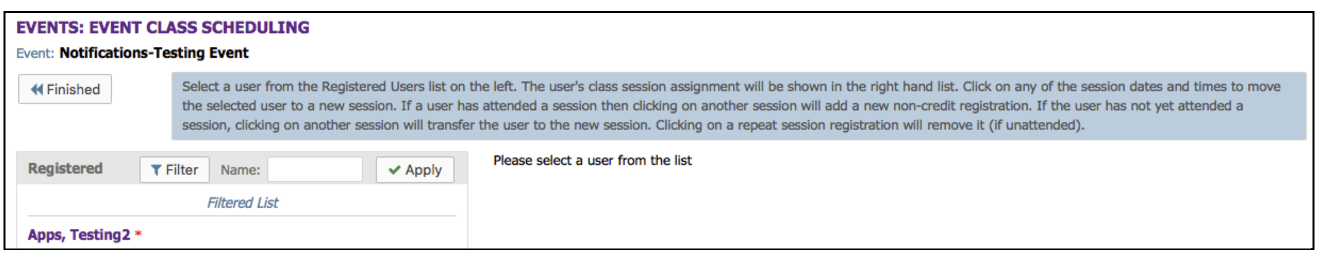


Figure 5-10 – Events & Activities: Class Scheduling

In Step #2, Administrators see a complete Class and Session summary for the selected User/Learner they picked in Step #1. Updates are made by clicking on the Session Date link highlighted in purple for any of the listed Sessions; selections are immediately saved and approved for the requested changes. Click the **Finished** button when all updates for the selected User/Learner have been made.

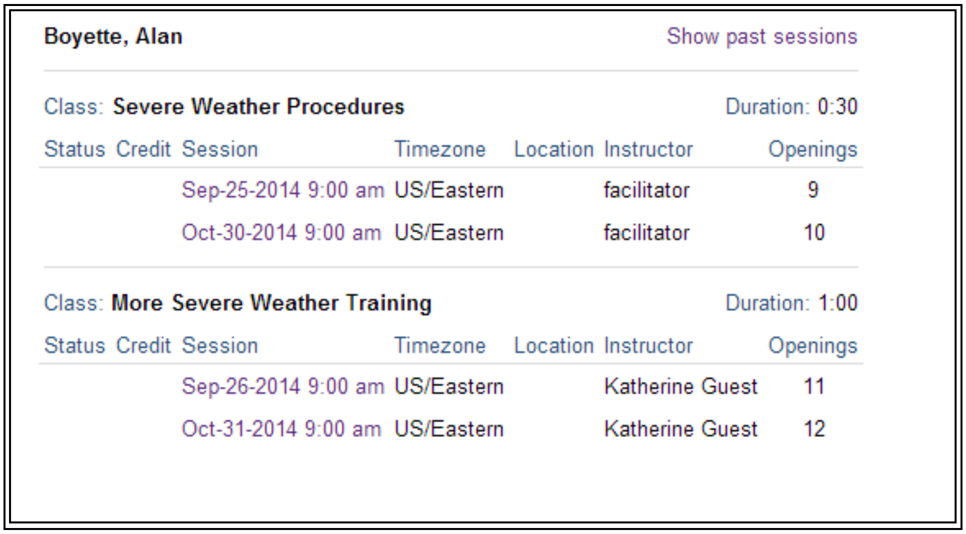


Figure 5-11– Events & Activities: Class and Session Summary

Tip: If there are multiple classes, you may want to ensure that you change both Class Sessions if that is appropriate (for example, if one Class is a pre-requisite for another, or normally precedes another).

5.3.1.2 Classes: Class Scheduling for User

This function is very similar to the "**Revise Schedule**" function described in the previous section but only looks at Session-level User assignments for a specific class rather than Session assignments for all Classes for a given Event. Administrators and Event Managers will normally use this function when they need to reschedule particular registrants to a specific Class from their currently assigned Session to another available Session in the case where the first Session was cancelled or delayed. Like the Revise Schedule function, the Class Scheduling function is an easy two-step process.
In Step #1 after selecting the Class Scheduling link, Administrators are presented with an alphabetized list of Users/Learners for the selected Class record and pick the name they wish to update from that list .

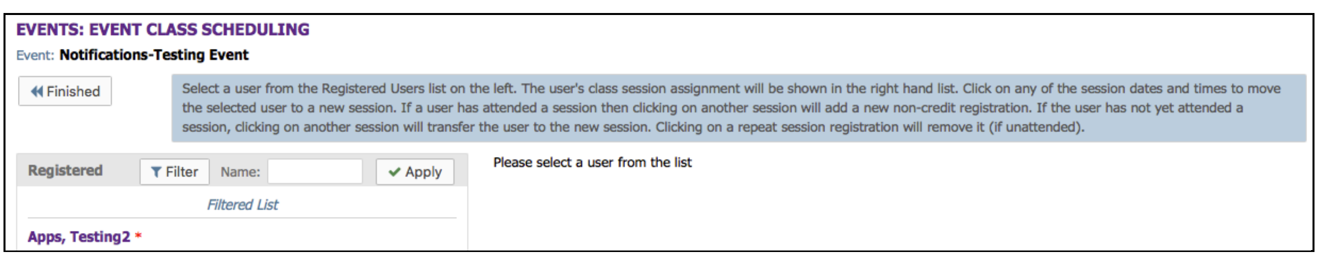


Figure 5-12– Events & Activities: Class Scheduling

In Step #2, Administrators see a complete Class and Session summary for the selected User/Learner they picked in Step #1.

Updates are made by clicking on the Session Date link for any of the listed Sessions; selections are immediately saved and approved for the requested changes .

Three different types of updates can be made:

- Move the User to a different session by clicking on the desired new Session date and time. If the User has not yet attended a session, they will be transferred to the new session. Click the **Finished** button to save and return to the Classes sub-tab.
- If a User has already attended a prior session of the same Class Sessions shown, another Session will add a new non-credit registration for the User. This is used to track Users who may be signing up to take classes they have already taken, or to accommodate a student who feels the need to retake a session. By tracking this, you have the ability to decide if the User should be allowed to do this or not.
- Clicking on a repeat session (as described in #2 above) will remove the registration assignment as long as it has not been attended yet. This is used to remove a repeat registration that a supervisor may have decided the User is not approved to take, or to remove a repeat assignment that the User decides is not going to be needed, and they have sent you a request to cancel their repeat registration.
- Click the **Finished** button when all updates for the selected User/Learner have been made.

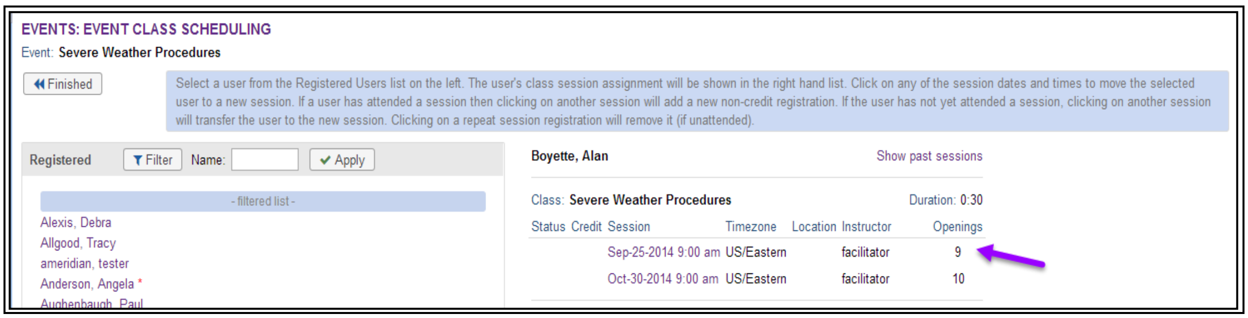


Figure 5-13– Events & Activities: Class Scheduling Review

5.3.1.3 Classes: Add a New Class

Once a new Event has been created, Administrators and Event Managers need to define at least one "**Class**" to the Event, with at least one "**Session**" time. To add a new class, click the Classes sub-tab and click the **Add Class** button at the top left . A blank Event Class Edit page will display. Please note that while the images below are for an Instructor-Led class, the process and fields are the same for all event types. For information on editing an existing class, see section below.

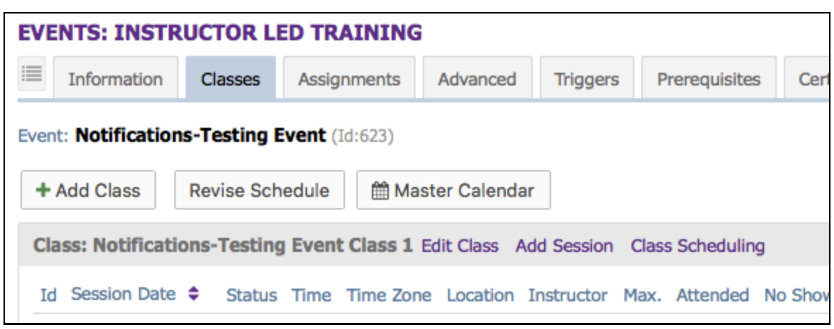


Figure 5-14A– Events & Activities: Add New Class

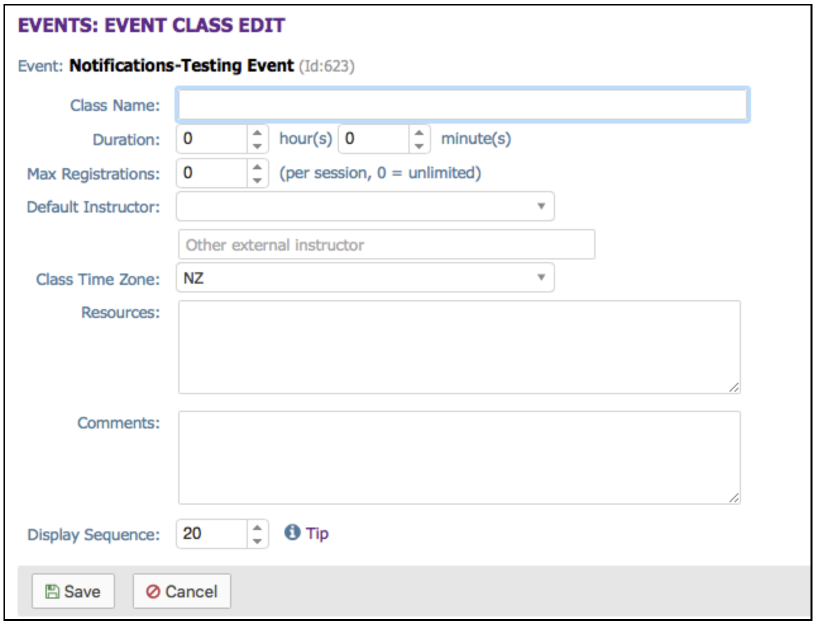


Figure 5-14B– Events & Activities: Class Add Complete

The listed fields in the **Event Class** screen include the following:

Events & Activities: Event Class	
Element	**Description**
Class Name:	The descriptive name given for the selected Class.
Duration:	The estimated time it will take to attend the selected Class, entering whole numbers into the hours and/or minutes field(s). **Note:** You may enter a value greater than 60 in the **minutes** field. The system will automatically translate this value into an Hours: Minutes value, which is visible after the record is saved and you return to the Event Class Edit page.
Max Registration:	Enter the maximum number of User registrations that can be accepted by the system for a selected Class/Session.
Default Instructor:	Provides a validated list of Instructors as defined under Users & Groups: User Records. Alternatively, use the Other External Instructor fill-in field to enter and Instructor name for someone outside the system.
Class Time zone:	Default time zone for the Class. This is much more important for Webinars or Streaming Events where attendees may span multiple time zones.
Resources:	Free form field that allows Event Managers to describe a list of resources (materials, collateral, equipment, personnel, etc.) that are anticipated and should be gathered by Instructors before conducting their Events. This information will only be seen by Instructors when reviewing their assigned Events.
Comments:	Free form field that provides additional details about the Event as needed. This information will only be seen by Instructors when reviewing their assigned Events.
Display Sequence:	This integer value determines the sequence order of the display listing for all

	defined Classes for the selected Event. As new Classes are added, they are incremented by a value of "10". To reorder a collection of existing Classes, edit the display sequence number as needed using any integer value (e.g. re-number 40 as 15 to move it between Classes 10 and 20).

At any time you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

Once your new Class has been created, it will be displayed on the Classes sub-tab in the first position, but will not possess any detail in terms of when it is offered. Therefore, a session needs to be added that will specify times and dates.

5.3.1.4 Classes: Edit a Class

Once a class has been defined, it can easily be edited by an Administrator or Event Manager. When in the event record, simply click on the Classes sub-tab, and click the **Edit Class** link to the right of the Class name. Use the Action buttons at the bottom to **Save** or **Cancel** your updates.

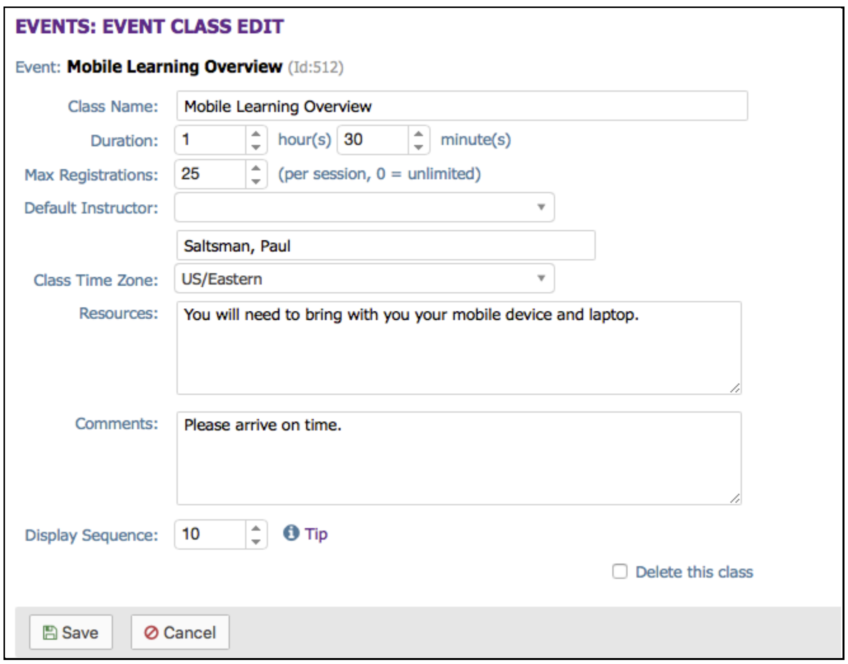


Figure 5-14C– Events & Activities: Class Edit

	Note: If an Event has multiple defined Classes, they will be listed in numerical order starting with "Class 1" followed by "Class 2", etc. The displayed order can be updated by changing the "Display Sequence" field value at the Class level.

Delete this class (checkbox)	Check this box and click **Save** to delete the class. **WARNING:** This is a destructive action and all class details previously recorded/earned will be deleted from the system.

5.3.1.5 Classes: Add a Session

This function allows Administrators and Event Managers to add one or more Sessions to a Class for the selected Event and define all of the Session-level specifics concerning "when" and "where". When an Administrator or Event Manager clicks the **Add Session** link, the **Event Class Session Edit** screen will display and will already be populated with general information defined at the Class-level plus provide fields to define the Session Date and Session Time. Different fields are available for ILT sessions than for Webinars sessions. Administrators can either accept or change any of the supplied location, registration, instructor or time zone information as needed. Click the **Save** button to commit the Session details, the **Reset** button to start over or the **Cancel** button to abort the Session Edit Screen and return to the Class Record display.

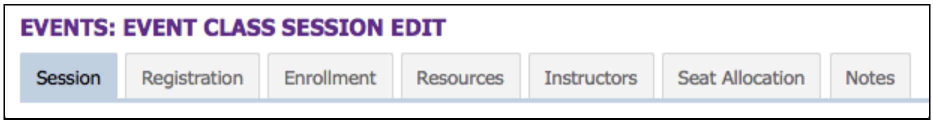


Figure 5-15A– Events & Activities: Add a New Session Tabs

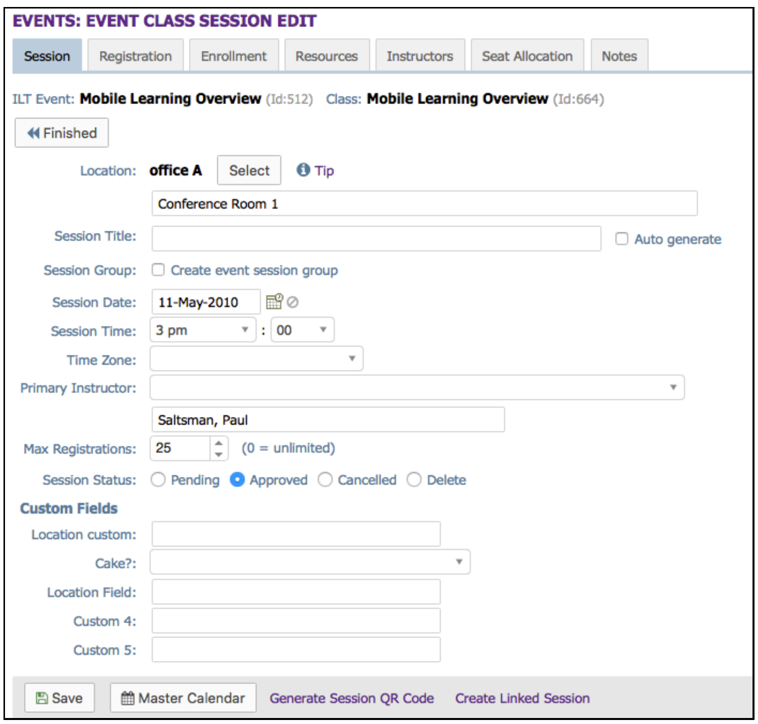


Figure 5-15B– Events & Activities: Add a New Session

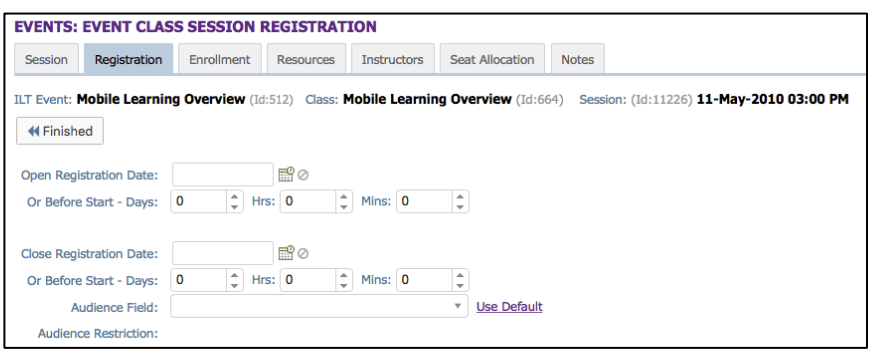


Figure 5-15C– Events & Activities: Add a New Session-Registration

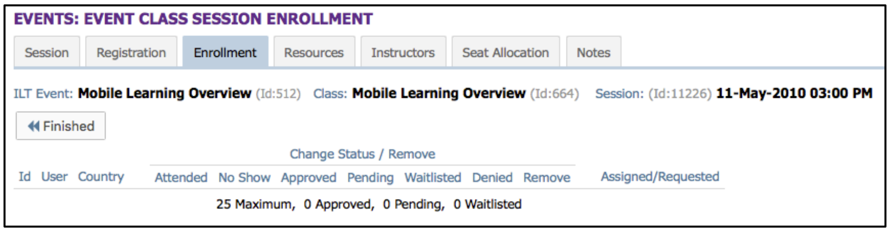


Figure 5-15D– Events & Activities: Add a New Session-Enrollment

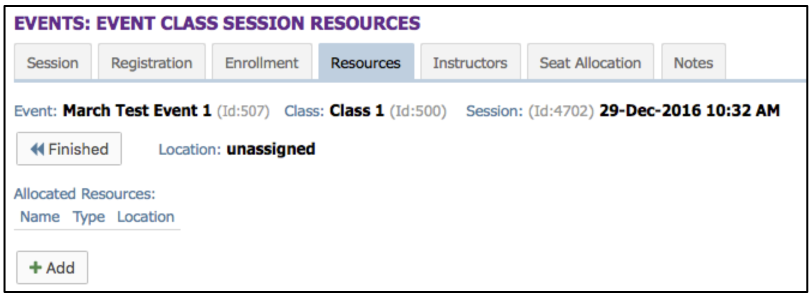


Figure 5-15E– Events & Activities: Add a New Session-Resources

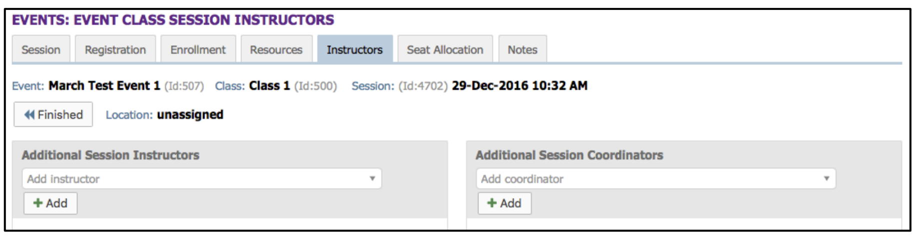


Figure 5-15F– Events & Activities: Add a New Session-Instructors

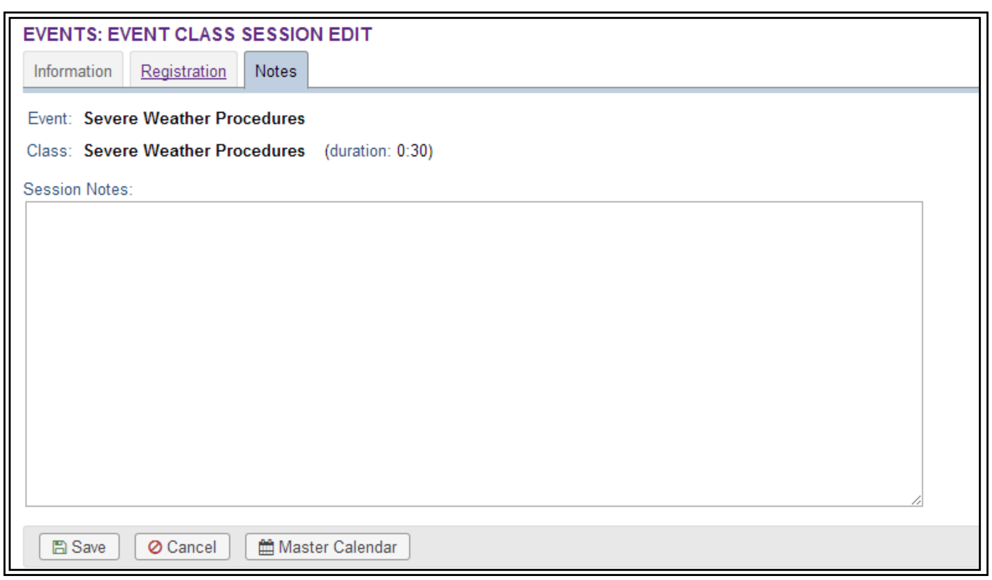


Figure 5-15H– Events & Activities: Add a New Session-Notes

The listed fields in the Event Class Session Edit screen under the session tab include the following:

Events & Activities: Event Class Session - ILT	
Element	**Description**
Location:	This optional field allows a specific location to be associated with this Event. Click the **select** link to choose from a list of locations previously set up in the system under the **Events - Event Locations** area. The Location information will be displayed to the User on the Event Session Registration page.
Session Title:	The specific title given to the session to differentiate it from other sessions or classes.
Session Date:	The specific date this Session will be offered. To enter a session date, click the calendar icon next to the Session Date entry fields and choose the date you desire.
Session Time:	The specific time this Session will be offered. To enter a time, select the hours and the minutes from the drop-downs provided.
Time Zone:	Specified time zone for the Session. This defaults to the time zone specified at the Class level, but can be changed here for this particular Session.
Primary Instructor:	Provides a validated list of Instructors as defined under User Records. This field defaults to the Instructor specified at the Class level, but can be changed here for this particular Session. Alternatively, use the Other fill-in field to enter an Instructor name for someone outside the system.
Max Registrations:	Defines the maximum number of User registrations that can be accepted for this particular Session. This field defaults to the number entered at the Class level, but can be changed here for this Session.
Time zone:	Specified time zone for the Session. This defaults to the Time zone specified at the Class level, but can be changed here for this particular Session.
Session Status:	Indicates the Status of the Session. • **Pending** • **Approved** • **Cancelled**
Events & Activities: Event Class Session - Webinars	
Element	**Description**
Session Title:	The specific title given to the session to differentiate it from other sessions or classes.
Session Date:	The specific date this Session will be offered. To enter a session date, click the calendar icon next to the Session Date entry fields and choose the date you desire.
Session Time:	The specific time this Session will be offered. To enter a time, select the hours and the minutes from the drop-downs provided.
Time Zone:	Specified time zone for the Session. This defaults to the Time zone specified at the Class level, but can be changed here for this particular Session.
(WebEx) URL:	The URL address that the User will use to access the Webinar Event.

WebEx Host:	Provides a validated list of Instructors as defined under Users & Groups: User Records. This field defaults to the Instructor specified at the Class level, but can be changed here for this particular Session.
Max Registrations:	Defines the maximum number of registrations that can be accepted for this particular Session. This field defaults to the number entered at the Class level, but can be changed here for this Session.
Session Status:	Indicates the Status of the Session. • **Pending** • **Approved** • **Cancelled**
Custom Fields:	Set up Custom Fields for different event needs, the Search function will also run on these.

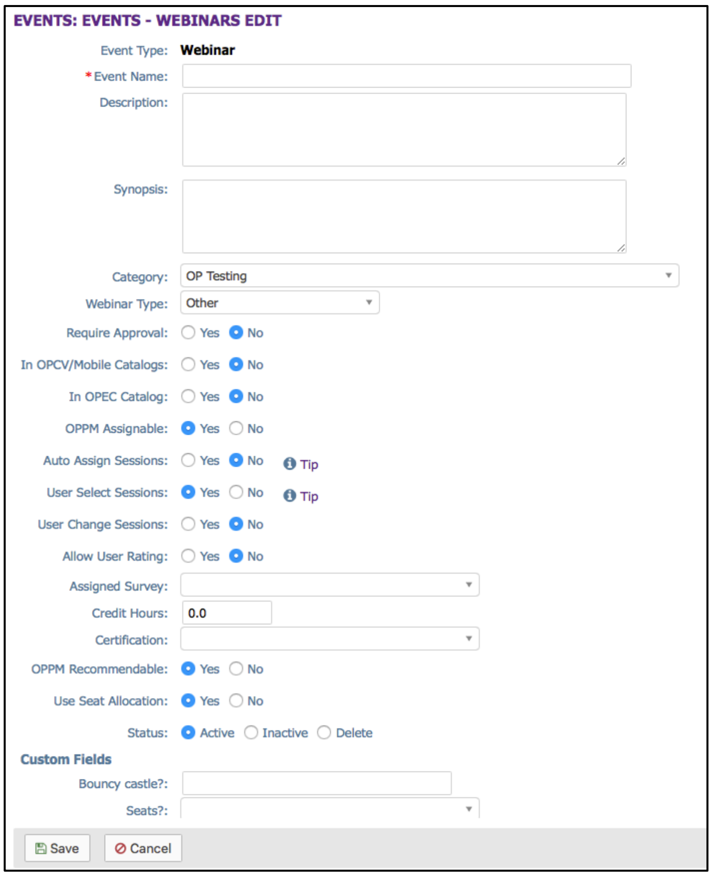


Figure 5-15I– Events & Activities: Add a New Session Webinar

At any time you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

5.3.1.6 Classes: Session Enrollment

One of the key functions of the Event feature set is Enrollment, a link under the Classes sub-tab menu.

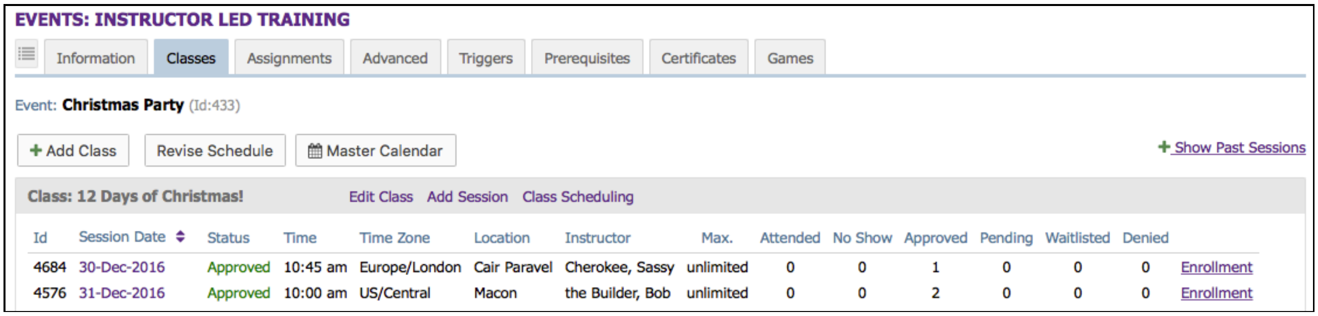


Figure 5-16– Events & Activities: Session Enrollment

Clicking the enrollment link located to the far right of any defined Session will display a list of all registered Users/Learners for the selected Session and allow Administrators and Event Managers to update the Event Status for the listed Users/Learners including updating their Attendance Status for that Event. Administrators and Event Managers can also retract a previously granted Event Registration Approval by changing a User's status back to "Pending", or remove them from the Enrollment List.

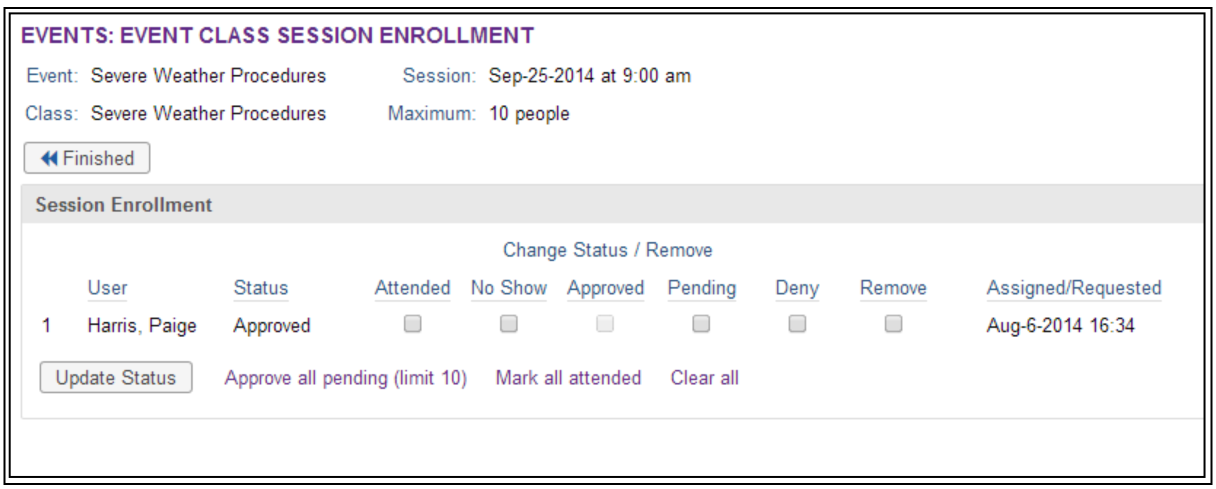


Figure 5-17– Events & Activities: Event Class Session Enrollment

All updates on this screen are made by clicking the corresponding checkbox to the right of the User/Learner's name. For added convenience, links are available at the bottom of the screen including "Approval all pending (limit xx)" registrations, **Mark all attended** and **Clear All**; selecting these links will add (or remove) checkboxes to every listed User/Learner. Once all the checkboxes have been marked as needed, the Administrator or Event Manager must click the **Update Status** button at the lower left to record the changes then click the **Finished** button to exit the screen.

5.3.1.7 Classes: Approvals

There are several ways for Event Managers to approve pending Event assignment requests:

- From the Classes sub-tab, click the **enrollment** link to the far right of the specific session you need. All Users assigned to the Session will be listed, along with their approval status. You may change an individual User's status by clicking the **Approve** checkbox for that User, or you may click the **Approve**

all pending (limit xx) link at the bottom to change all Users with Pending status to Approved status simultaneously. Click the **Update Status** button to ensure your changes are made. Click the **Finished** button to return to the Classes sub-tab page.

- From the Course Manager Home page under the Pending area, click the **Approve** link next to Event registrations pending approval. You may change an individual User's status by clicking the Approve checkbox for that User, or you may click the **Approve All** link at the bottom to change all Users with Pending status to Approved status simultaneously. Click the **Update Status** button to ensure your changes are made. Click the **Finished** button to return to the Home page.

5.3.1.8 Classes: Waiting Lists/Approvals

When an Event Session is created, you can specify the number of available seats (Max Registrations). These seats will be filled in two ways:

- An Event Manager clicks the **Class Scheduling** link, selects a User and assigns them to a specific session. If a session seat is available, the User will be added to the list of assignees, with an Approved status. If a session seat is not available, the User will be added to the waiting list for the Session.

- Whenever a User is removed from an assigned session, either by a Manager or by an individual User when they select an alternative session to attend, that seat becomes available and the system automatically places the next User on the waiting list into that available seat.

- A User self-registers for a particular Session. If a session seat is available, the User will be added to the list of assignees, with an Approved status*. If a session seat is not available, the User may see other available Sessions he/she can register for.

Tip: In the case where Users are assigned to an Event by way of a Skill Profile or Group-level assignment, they are NOT automatically assigned into available Sessions that may have been set up. This is so that the Event Manager can best determine the total number of Sessions that may be needed to accommodate the total number of assignees and the size of the classroom sessions that may be needed. Once these Sessions are established in the system, the Manager can click the **Assign** link to the right of the Missing Session Assignments notation at the bottom right of each Class and select the Users to assign to the session.

Note: In order for Users to self-register, they must have already been assigned to the Event (i.e. pre-authorized), or the Event itself has to be one that does not require approval. If the Event requires approval, a User can Request Enrollment but will remain in a Pending status until a Manager approves his/her request to attend. Also, Users can "unassign" themselves from a particular session. This action does not unassign them from the assigned Event and Class. It simply takes them out of the actual session and adds them to the Missing Session Assignments pool until they select a new session or a Manager assigns them to a new session.

Waitlists

When an Event Session is created, you can specify the number of available seats (Max Registrations). These seats will be filled in two ways:

- An Event Manager clicks the **Class Scheduling** link, selects a User and assigns them to a specific session. If a session seat is available, the User will be added to the list of assignees, with an Approved status. If a session seat is not available, the User will be added to the waiting list for the Session.

- Whenever a User is removed from an assigned session, either by a Manager or by an individual User when they select an alternative session to attend, that seat becomes available and the system automatically places the next User on the waiting list into that available seat.

- A User self-registers for a particular Session. If a session seat is available, the User will be added to the list of assignees, with an Approved status*. If a session seat is not available, the User may see other available Sessions he/she can register for.

	Tip: In the case where Users are assigned to an Event by way of a Skill Profile or Group-level assignment, they are NOT automatically assigned into available Sessions that may have been set up. This is so that the Event Manager can best determine the total number of Sessions that may be needed to accommodate the total number of assignees and the size of the classroom sessions that may be needed. Once these Sessions are established in the system, the Manager can click the **Assign** link to the right of the Missing Session Assignments notation at the bottom right of each Class and select the Users to assign to the session.

	Note: In order for Users to self-register, they must have already been assigned to the Event (i.e. pre-authorized), or the Event itself has to be one that does not require approval. If the Event requires approval, a User can Request Enrollment but will remain in a Pending status until a Manager approves his/her request to attend. Also, Users can "unassign" themselves from a particular session. This action does not unassign them from the assigned Event and Class. It simply takes them out of the actual session and adds them to the Missing Session Assignments pool until they select a new session or a Manager assigns them to a new session.

Approvals
There are several ways for Event Managers to approve pending Event assignment requests:

- From the Classes sub-tab, click the **enrollment** link to the far right of the specific session you need. All Users assigned to the Session will be listed, along with their approval status. You may change an individual User's status by clicking the Approve checkbox for that User, or you may click the **Approve all pending** (limit xx) link at the bottom to change all Users with Pending status to Approved status simultaneously. Click the **Update Status** button to ensure your changes are made. Click the **Finished** button to return to the Classes sub-tab page.

- From the Course Manager Home page under the Pending area, click the **Approve** link next to Event registrations pending approval. You may change an individual User's status by clicking the Approve checkbox for that User, or you may click the **Approve All** link at the bottom to change all Users with Pending status to Approved status simultaneously. Click the **Update Status** button to ensure your changes are made. Click the **Finished** button to return to the Home page.

5.3.2 Events & Activities: Assignments

From this Submenu, Administrators and Event Managers can assign one or more Event/Session Coordinators for the selected Event, and can select and assign Users (or any Groups/Job Codes) as well.

5.3.2.1 Assignments: Event/Session Coordinators

Allows Administrators and Event Managers to select and assign one or more Event/Session Coordinators to oversee the selected Event. Clicking the **Assign** link displays a list of defined OnPoint Administrators who can be associated with the current Event/Session record; more than one Event/Session Coordinator may be named (one at a time) from the list. Event/Session Coordinators are pulled from the available pool of defined OnPoint administrators and, as such, when they are referenced to a particular Event/Session, it is possible to associate and retrieve any Administrator details like email address or telephone numbers that may need to be supplied to Users/Learners looking to register for or change their registration for a particular Event/Session. To add an Event/Session Coordinator, select their name from the displayed list of Available Coordinators on the right and click the **Finished** button to exit the screen.

5.3.2.2 Assignments: User/Group Assignments

Allows Administrators and Event Managers to select and assign Users or Groups/Job Codes to the selected Event/Session. Clicking the **Assign** link displays an alphabetical list of OnPoint Users who can be associated with the current Event record; select as many users as needed - up to the set registration limit. To narrow the displayed list of Users (or Groups), use the **Filter** button at the top right of the Available Users list to update your display criteria as needed.

To select Users/Learners, mark the corresponding checkbox next to their name as it appears on the list of Available Users and then click the **Assign** button to move those selections to the Registered Users side of the table (on the left side). When finished, click the **Finished** button to record your selections.

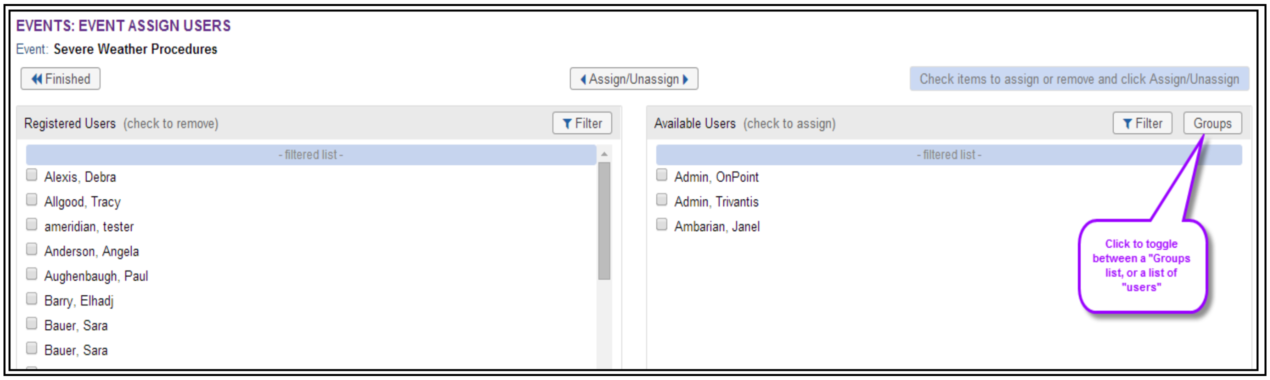


Figure 5-18– Events & Activities: Assign Users

Tip: If your organization has hundreds or thousands of Users, and "Available Users" list will apply a default filter by the letter "A" in order to shorten the list when it is first displayed. Click the **Filter** button to change this to a different filter choice, or use the **Groups** button to see a list of Groups in order to make an assignment to all its members at once.

Tip: Any automatic assignments that are associated with a particular Event - for instance a Pre-Event Course, a Post-Event Assessment or a Notification about the new Event Assignment will then be assigned to the new Users.

5.3.3 Events & Activities: Triggers

From the Triggers sub-tab, Administrators and Event Managers can set up automated notifications as well as select and assign any assignable system object to Users based on the following conditions:

- Approved-For-Event-Session
- Assigned-To-Event
- Assigned-To-Event-Session
- Complete-Event
- Create-Pending-Event-Session
- Denied-Event-Session
- Event-No-Show
- Event-Session-Cancelled
- Event-Session-Changed
- Instructor-Assigned
- Instructor-Unassigned
- Recertify-Event
- Recommend-Event
- Reinforce-Recommendation-Event
- Removed-From-Event-Session
- Request-Event-Session

Clicking the Trigger Action dropdown, choose the condition you wish to create the trigger for, then click the **Add** button.

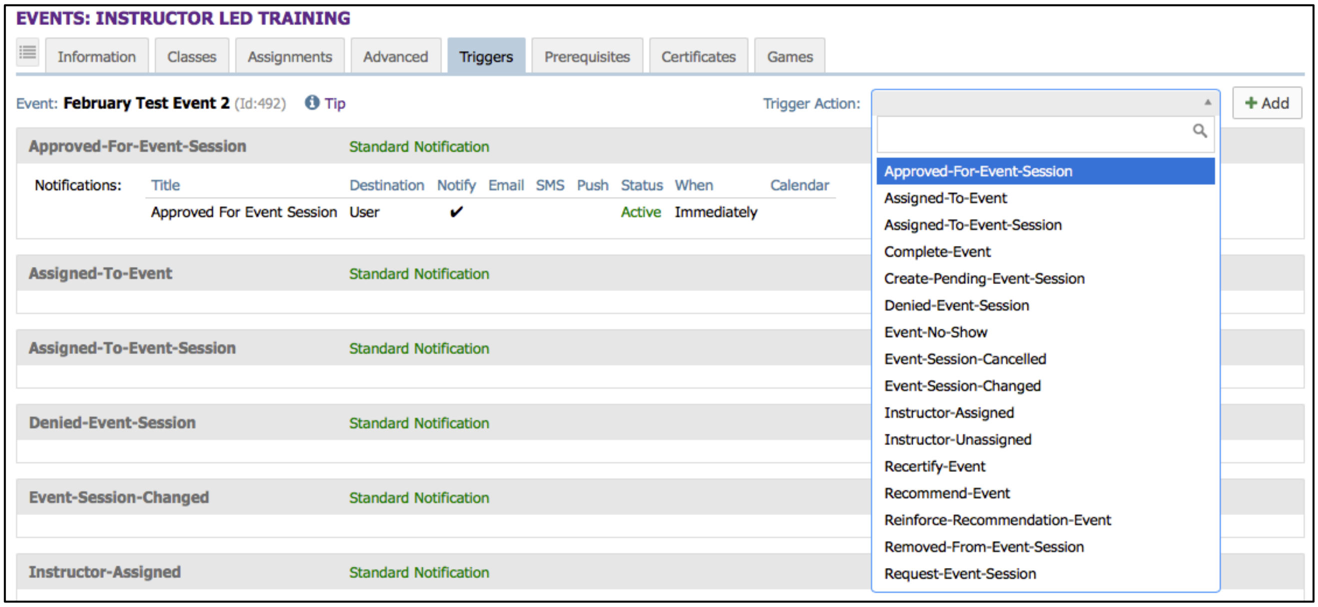


Figure 5-19– Events & Activities: Trigger Action Conditions

5.3.3.1 Triggers: Add Notification

Selecting "Add Notification" allows you to set up a Notification, including the message you want to convey, who the message will be sent to, how it will be sent – via portal (default) and also optionally to the selected recipients' email and/or Push Notification. Notifications can be created that drive prerequisites, post-event assignments, and reminders. Various database fields are available (down the right side of the screen) to be used within the message template text. Simply have your cursor inside the message window then click the file name desired. Click **Save** when you have completed the Notification creation, or **Cancel** to exit without saving any changes.

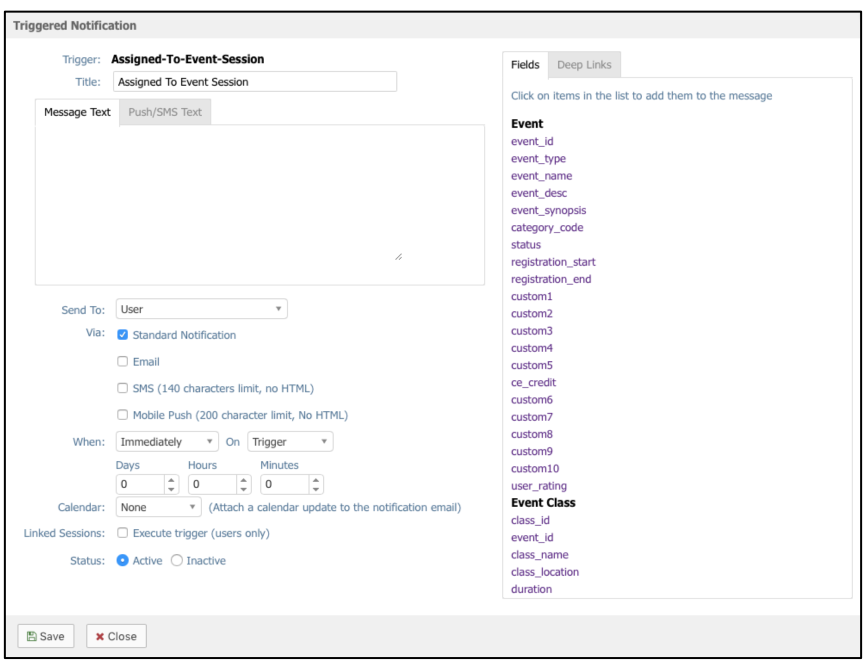


Figure 5-20– Events & Activities: Define Notifications for an Event

5.3.3.2 Triggers: Add Assignment/Recommendation

Allows you to select and assign published online Courses, Assessment Sets, learning Nuggets, Skill Profiles, Events, or Activities to Users who meet one of the 3 conditions: Assigned-to-Event, Assigned-to-Event-Session, or Completed-Event. Simply select the Object Type from the dropdown and a list of available items of that type will appear. Scroll through the list and select one item. [If you select the wrong item, simply make another selection to overwrite the first.] Click **Save**. The assignment will then be listed. Multiple assignments can be made by following these steps again.

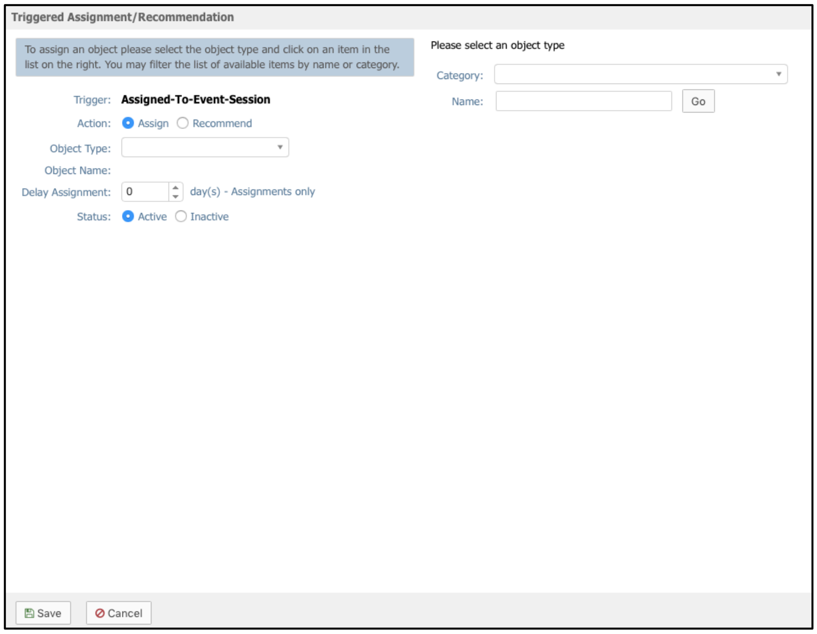


Figure 5-21– Events & Activities: Add Assignments

Remove Action: To remove an action, simply click the **Remove Action** link. All assignments and notifications associated with that condition header will be removed.

Override Standard: If a Standard Notification has been setup, it will display here. You may use it, or override it by defining your own. Remember to click Override Standard: No if you wish to override it. The link will change to display Override Standard: Yes. Otherwise, any triggered notification you create will be an additional notification rather than a replacement.

5.3.3.3 Events & Activities: Advanced

The Advanced tab allows you to set the Thumbnail image, display tags, and Meta Tags.

Events & Activities: Advanced Tab	
Element	**Description**
Thumbnail Image:	Allows to change the thumbnail image for the Assessment Set. Thumbnail image must be uploaded in the administration tab
Meta Tags:	Adding meta tags to Assessment Sets allow for quick references in custom UI's and searches.

Display Tags:	Adding Display Tags to Assessment Sets is an option for selecting which items will be displayed in a Hierarchy Node. Display Tags can be established and then the tags can be assigned to specific content to display in one or more Hierarchy Nodes.

Figure 5-22– Events & Activities: Advanced

5.3.3.4 Triggers: Event Notifications

The choice of database tables available from which to select fields for insertion into notifications changes when you are sending a notification for an Event assignment or completion condition, versus a notification for a specific Session assignment. This is in keeping with the hierarchal organization where an Event is the most general concept and a Session is the most specific. Therefore, information such as Location would not make sense for an Event-level notification, but does makes sense at the Class-level, or perhaps a specific one-time-only Location at the Session-level, to override the Class default.

Fields from two database tables are available to select from when sending a notification regarding an Event:

- User Fields
- (Event) Fields

Fields from those, as well as two additional tables (four in total), are available when sending a notification regarding a Session assignment:

- User Fields
- (Event) Fields
- Event Session
- Event Session Location

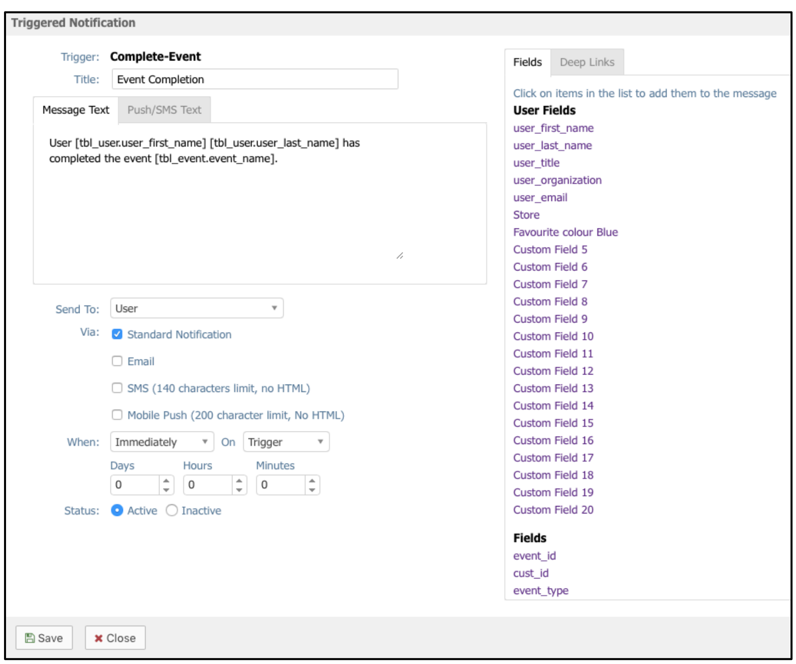


Figure 5-23– Events & Activities: Notifications

	Note: The Event database, Class database and Session database tables share some common field names. When you are selecting fields for inclusion into your Session notifications, determine whether you need to include information specific to that session. If so, select a field from the Event Session table to provide details such as Instructor or Maximum Registration that may be specific to this particular session, but different than the "default" values found in the Event Classes table.

The listed fields available in all four tables include the following:

Events & Activities: Trigger Notifications User Field	
Field (Event-level info)	**Description**
user_first_name:	User's first name
user_last_name:	User's last name
user_title:	User's title
user_organization:	User's organization
user_email:	User's email

Events & Activities: Trigger Notifications Event Field	
Field (Event-level info)	**Description**
event_id:	OP ID for Event
cust_id:	Customer number from server's root directory
event_type:	Event type: 1=ILT, 2=Webinar
event_name:	Name of Event
event_desc:	Event description
event_synopsis:	Event synopsis
category_code:	OP ID for category of Event
user_select_session:	Is user allowed to select their Sessions? Y/N
require_approval:	Does Event require approval to attend? Y/N
create_date:	Date Event was created in system
create_user_id:	OP ID for user who created Event
update_date:	Date of last update to Event
update_user_id:	OP ID for user who last updated the event
status:	Status of Event
auto_assign:	Is Event set to auto assign users to sessions? Y/N
for_sale:	Is Event in OPEC catalog? Y/N

in_opcv_cat:	Is Event in OPCV catalog? Y/N
registration_start:	Registration start date
registration_end:	Registration end date
custom1:	Info from custom field #1 (ex: 'Facilitator')
custom2:	Info from custom field #2
custom3:	Info from custom field #3
custom4:	Info from custom field #4
custom5:	Info from custom field #5
certificate:	Title of assigned certificate

Events & Activities: Trigger Notifications Event Class Field

Field (Class-level info)	Description
class_id:	OP ID for Class
cust_id:	Customer number from the server's root directory
event_id:	OP ID for Event
class_name:	Name of Class
class_location:	Default location of Class
duration:	Duration of Class (in minutes)
max_registration:	Maximum number of registrants in this Class
instructor:	Instructor's Name
event_timezone:	Time zone of Class
conference_server:	Default dial-in conference phone number for this class; note that this is only valid data for Webinars or Live Streaming sessions.
conference_room:	Default password/ID number given on the dial-in conference phone number to access this class; note that this is only valid data for Webinars or Live Streaming sessions.
resources:	Resources (LCD projectors, screens, etc.) selected for Class
comments:	Comments
sequence:	Display sequence of Class in Class listing

Events & Activities: Trigger Notifications Event Session Field

Field (Session-level info)	Description
session_id:	OP ID for Session
cust_id:	Customer number from server's root directory
event_id:	OP ID for Event
class_id:	OP ID for Class
location_id:	OP ID for Location if Location selected from 'tree'
resource_cal_id:	OP ID for a resource (i.e. LCD projector) at a specific Calendar date/time
class_location:	Physical location of the session. Note: This may be different than the default location assigned at the Class-level above.
start_date:	Date and time of Session
max_registration:	Maximum number of registrants in this Session. Note: This may be different than the default maximum number of attendees allowed as assigned at the Class-level above.
instructor:	Instructor's Name. Note: This may be different than the default instructor assigned at the Class-level above.
event_timezone:	Time zone of this Session. Note: This may be different than the default time zone assigned at the Class-level above.
conference_server:	Dial-in conference phone number for this session; note that a) this is only valid data for Webinars or Live Streaming sessions, and b) this may be a different number than the phone number assigned at the Class-level above.
conference_room:	Password/ID number given on the dial-in conference phone number to access this session; note that a) this is only valid data for Webinars or Live Streaming sessions, and b) this may be a different number than the password/ ID number assigned at the Class-level above.

5.3.3.5 Events & Activities: Prerequisites

From this sub-menu, Administrators can establish any requisite assignments they want Users/Learners to complete before accessing this Event. Prerequisites can be any object type in the system (Course, Assessment Set, Nugget, Event, or Activity).

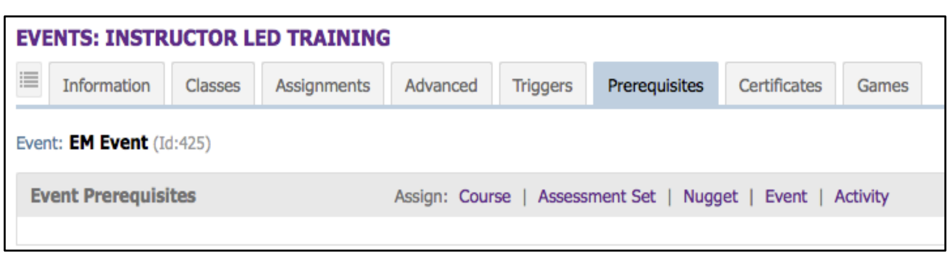


Figure 5-24– Events & Activities: Prerequisites

5.3.3.6 Events & Activities: Certificates

From this submenu, Administrators and Event Managers can select any stored certificate from the dropdown to associate with this particular Event. Once a certificate design is selected, the system will associate an earned certificate for all Users who complete the Event. The system will track all certificates earned by Users, and track the results of earned, passed/completed, printed, and associated certificate ID's for all Users. Administrators can access this detail at any time.

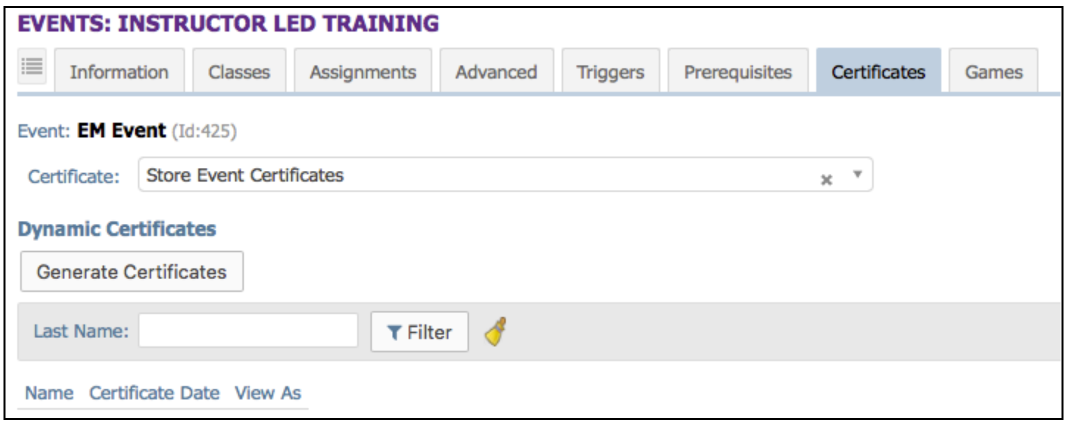


Figure 5-25– Events & Activities: Certificates

	Note: Certificate designs are uploaded to the Content - Library area of Course Manager.

5.3.3.7 Events & Activities: Games

The Games sub-tab allows you to add Game Points within a Skill Profile by selecting **Add Game Points**.

Events & Activities: Skills & Games	
Element	**Description**
Game Points:	Administrators can add Game Points within a Skill Profile. By clicking Add Game Points you will see a drop down menu with the option of Points for Completion and a field to enter in the number of points to be earned.

5.6 Events & Activities: Registration Overview

This selection provides a list of all Event Registration Requests (ILT or Webinar) that are pending Administrative approval. Requests are listed in reverse date order (most recent first) and the displayed list includes the Class and Session requested and User.

An Administrator may approve, deny, or Remove the request via a simple check box.

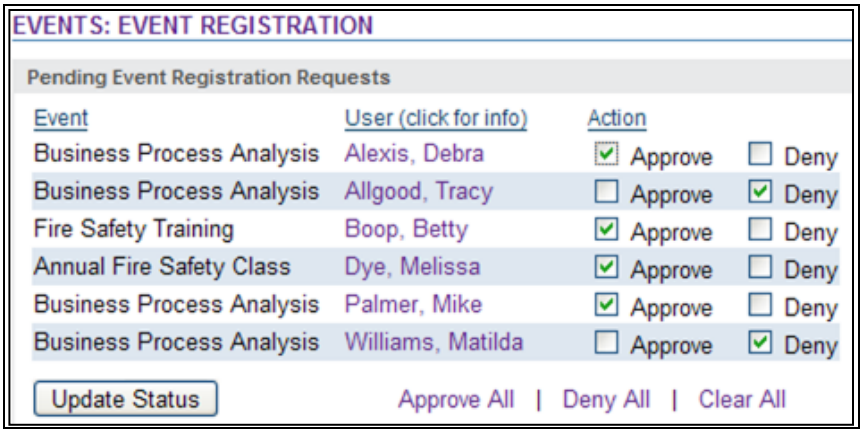


Figure 5-26– Events & Activities: Registrations Pending Approval

This function is also available for an Administrator from the Home page of Course Manager where any Pending Requests would be noted. Click the **Approve** link to view the same page.

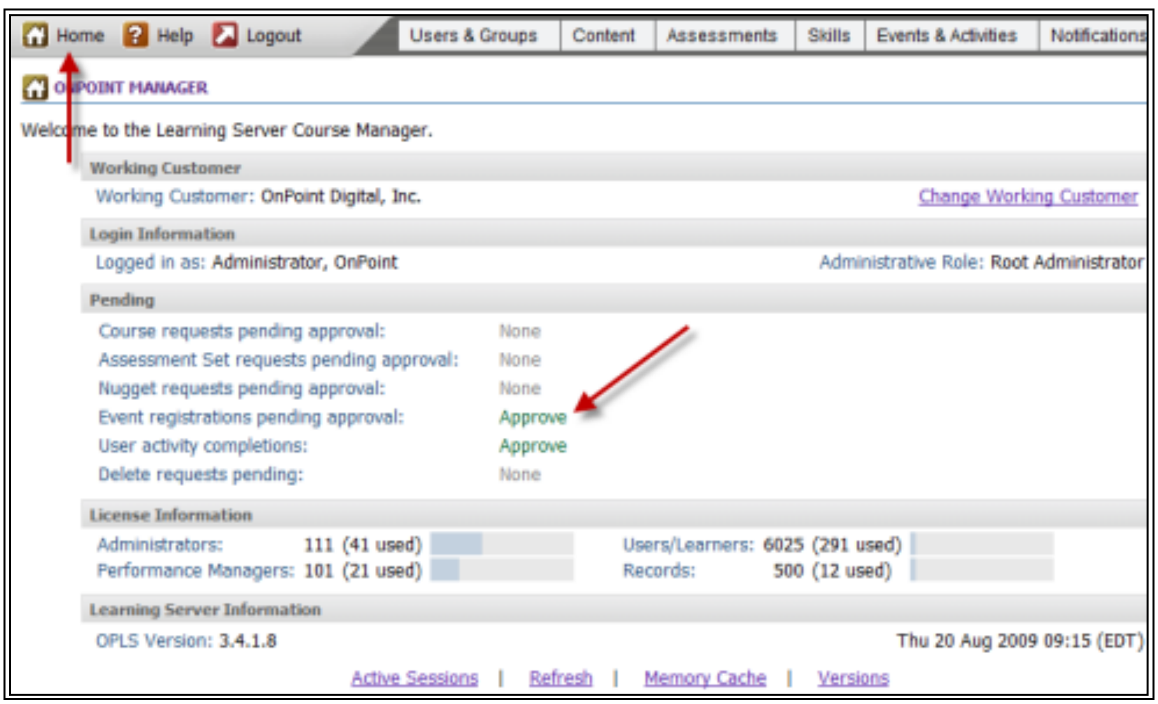


Figure 5-27– Events & Activities: Pending Approval

5.8 Events & Activities: Activities

This selection displays the Events & Activities: Activities List, a database listing of all current Activities defined in the Course Manager database. In the OnPoint environment, Activities are considered as "to do list" items completed outside the learning system, but in conjunction with taking a course or attending an Instructor-led class. Assigned Activities might include such actions as:

- Completing an application process or filing necessary paperwork
- Attending a convention, trade show or industry conference
- Participating in an off-site meeting or planning session
- Attaining a professional certification level
- Getting a commercial driver's license

Activities can either be tracked individually or made a necessary component of earning a Skill, Skill Set or assigned Skill Profile. Each assigned Activity includes all of the necessary information about successfully completing the Activity to meet the level of expectations established by its originator.
From the main Activities list, you may:

- Select an Activity record from the List to review or edit by clicking on the Activity Name field;
- Click the **Add Activity** button to create a new Activity; or
- Use the **Filter** button to narrow your search for a specific Activity.

Id	Activity Name	Type	Status
A Super-Duper Important Test Plan Thingie			
240	A Christmas List	Optional	Active
255	Testing due dates	Required	Active
241	What day is good for testing	Optional	Active
April 2015			
221	Make Coffee for Lara	Recommended	Active
Bestest, Mostest Awesomest Category Ever!			
256	Living Spaces Actiity	Required	Active
188	Taking the hobbits to Isengard	Required	Active
218	Upload Test Activity	Recommended	Active

Figure 5-28– Events & Activities: Activities

5.8.1 Events & Activities: Activities

Activities are listed alphabetically by Activity Name. The Activity list displays the following:

Events & Activities: Activity - Main Page	
Element	**Description**
Activity Id:	The Id number associated to the activity.
Activity Name:	The name of the Activity. Click the Activity Name to view more details about the Activity, or to edit the Activity record.
Type:	The type of Activity (Recommended, Required, or Optional).
Status:	Indicates the Status of the Activity. • **Active** (Activity in use)

	• **Inactive** (Activity not in use) • **Request Delete** (Activity no longer needed)

Other Activity: List - Related Information:

A few additional features can be found on the Events & Activities: Activities summary list screen:

A. **Activity Count** - At the bottom left of the Activity List table is an active count of all the current Activities managed in your Course Manager database.

B. **Color Keys** – Activities listed in the Activity List table are considered "Active" but may be flagged for "Inactive" or "Request Delete" by Level 4 or 5 administrators. A legend (or reminder key) may appear at the lower left of the Activity List table indicating at least one Activity has been marked as "Inactive" (the record will be highlighted in **Yellow**) or "Request Delete" (the record will be highlighted in **Pink**).

Figure 5-29– Events & Activities: Activity Summary

5.8.1.1 Activities: Search for Activity Record

To find a specific Activity, you may:

1. Scroll through the list until you locate the Activity record
2. Use the **Filter** button to narrow your search for a specific Activity

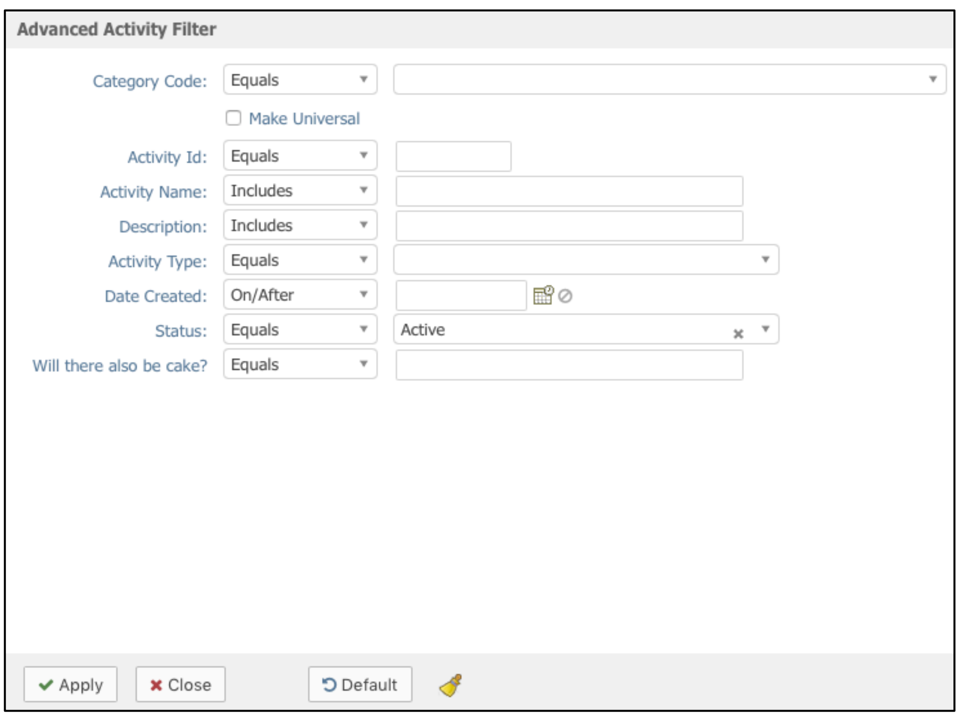


Figure 5-30– Events & Activities: Search for Activity Record

The Events & Activities: Activities Filter allows you to search for an Activity by any of the following search criteria:

Events & Activities: Activity Filter	
Element	**Description**
Drop Down Options:	• **equals** – filters for a match of a letter or text string. • **begins with** – filters for all Activities beginning with the criteria (e.g. type an A and get a list of all Activities beginning with A). • **includes** – filters for all Activities that include the criteria (e.g. type "Baseball" and get all Activities that include that word). • **ends with** – filters for all Activities ending with the criteria. • **not equal to** – filters out everything matching this entry, (e.g. type an A and no Activities beginning with A will display). • **less than** – filters all matches less than the criteria. • **greater than** – filters all matches greater than the criteria.
Category Code:	Search by a specific Category option selected in the drop-down menu; default selects no specific category and therefor shows all categories.
Make Universal:	Select this box if you want all searches performed while you are logged in, to be set to this specific Category. This selection will maintain the filter until you clear it, or logout of Course Manager. **Note:** The most common search is filtered on Category. If you are working within a particular Category, you may want to select the "Make universal" checkbox so that all other searches will be filtered for that Category during your current session, until you clear the filter of logout.
Activity Id:	Search by the Id number given to each activity.
Activity Name:	Search by the name of the Activity.
Description:	Search by the description of the Activity. Use the same drop down menu options as described above.
Activity Type:	Search by the type of Activity (Required, Recommended, or Optional).
Date Created:	Search by the date the Activity was created. Use the same drop down menu options as described above.
Status:	Search by the Status of the Activity (Active, Inactive, Deleted).
Custom Fields:	Search by any custom fields you have created.

When you are finished entering your selection criteria, click:

Apply	To start the Search.
	To clear the criteria so that you can start again.
Default	To reset the criteria to the default options (All Active Courses).
Close	To close the Filter window and return to the User table list.

5.8.1.2 Activities: Create New Activity Record

To create a new Activity record, click the **Add Activity** button at the top of the list of Activities: Activities; a new Activity record screen will appear.

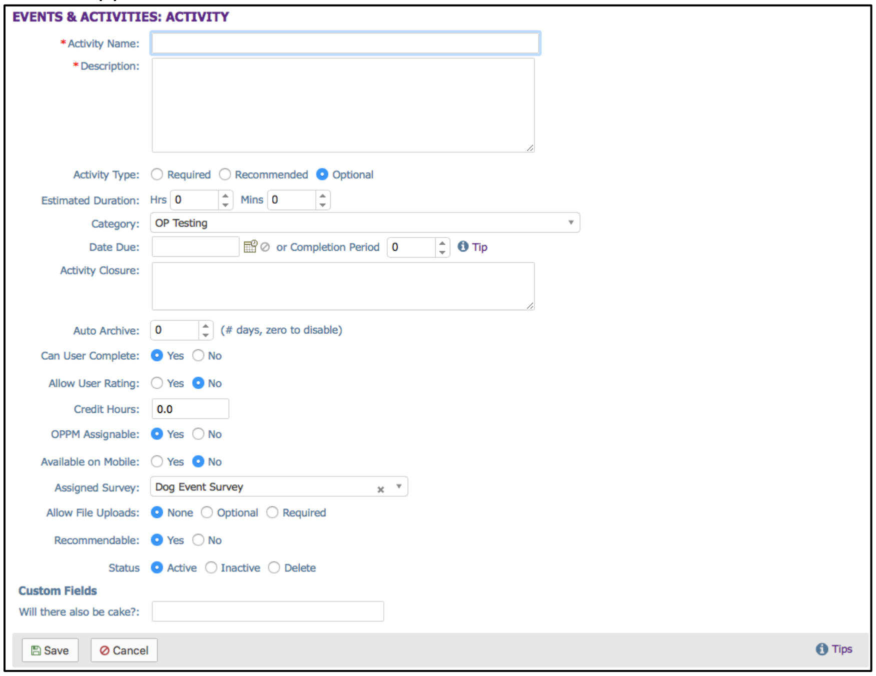


Figure 5-31– Events & Activities: Create New Activity Record

Enter the information for the following data fields:

Events & Activities: Add New Activity Record	
Element	**Description**
Activity Name:	Enter the new Activity's name.
Description:	Provide a description of the new Activity.
Activity Type:	Select the type of Activity (Required, Recommended, or Optional).
Estimated Duration:	Enter a numerical value indicating the estimated time (in minutes) to complete this Activity.
Category:	Select the assigned Category from the drop-down to help in organization and searching.
Date Due:	Date that the activity must be completed by.
Or Completion Period:	Instead of selecting a date the activity is due, this field allows you to select the number of days that the user/learner has to complete the activity once they have started it.
Activity Closure:	Provide a brief description of what constitutes closure of the Activity.
Auto Archive:	When the event should archive based on a # of days after completion of the event. Leaving this as a zero will disable this function.

Can User Complete:	Allows the user to log their own completion status without manager intervention.
Allow User Rating:	Select Yes/No if you would like the option to allow users to give a rating on the activity.
Credit Hours:	Enter the number of credit hours associated with the Event.
OPPM Assignable:	Select 'Yes' to allow Performance Managers to assign the Activity through the Performance Manager application.
Available on Mobile: (for CellCast customers)	Select 'Yes' to allow the Activity to display and be completed from the User's mobile device.
Assigned Survey:	This field allows an Admin to select a general survey to be associated with this event. This field works in conjunction with user ratings so that when these are flagged, a user can go into OPCV and provide both a rating and comments after an Event has been completed.
Allow File Uploads: (optional feature configured by OnPoint; call OnPoint support to enable file uploads)	Options include: • **None -** no file can be uploaded as part of the Activity completion process (default). • **Optional -** a file can be uploaded as part of the Activity completion process, but it is not required for completion fo the Activity. • **Required -** a file must be uploaded or the user will be unable to complete the Activity.
Recommendable:	Select Yes/No if this is allowed to be recommended by a Performance Manager.
Status:	Indicates the status of the Activity Record. Field defaults to "Active". • **Active** (Activity is in use) • **Inactive** (Activity not currently in use) • **Request Delete** (Activity no longer needed)

Note: Unlike most other OnPoint object types, Activities have the completion option of Required, as well as Recommended and Optional. Since an activity is something occurring "outside of" the OnPoint Learning System, these options are intended to provide an additional level of flexibility to track items that may not be critical, but are still of interest to the organization or managers.

Tip: Use the "**Can User Complete**" field on an "honor roll" basis for these non-critical activity assignments, so that users can easily log their completion status without manager intervention.

At any time you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

Activity Edit Action Buttons

All Activity information fields can be edited at any time with additional or updated information by selecting the record you wish to edit from the list, then select **Edit** from the Action Buttons at the bottom of the page.

Action buttons that appear across the lower portion of the page include the **Edit** which will allow you to view and edit the data fields for your selected record, the **Refresh** which allows you to refresh the page with recent updates if needed, and the **List** option which will return you to the previous listing that you were working from.

Note: After editing an Activity record and saving your updates, click the **Refresh** button to make sure all of your changes are displayed.

Making Assignments when Creating a New Activity

Once the new Activity has been created, the lower half of the Assignments sub-tab in the Activity record provides an area to make assignments for the Activity. Since your newly created Activity has just been defined, no assignments will be displayed.

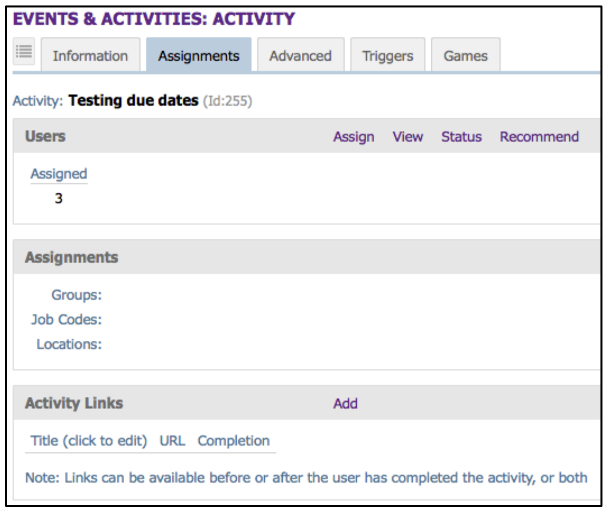


Figure 5-32– Events & Activities: Assignments with New Activity

Events & Activities: New Activity Assignments	
Element	**Description**
Assigned Groups/Users:	Indicates which Users and Groups are assigned to the Activity. Click the **Assign** link to change or add users to the Activity. Select from Available Groups and/or Available Users (located on the right side of the screen), and click the **Assign** button to commit your selections and then select **Finished** to return to the Activity record. Use the available filters to find specific users or groups. You can view Available Groups by clicking the **Groups** button.

Note: Only users are displayed in the left hand Assigned Users columns. Groups will not appear in this column, only the users assigned to those groups.

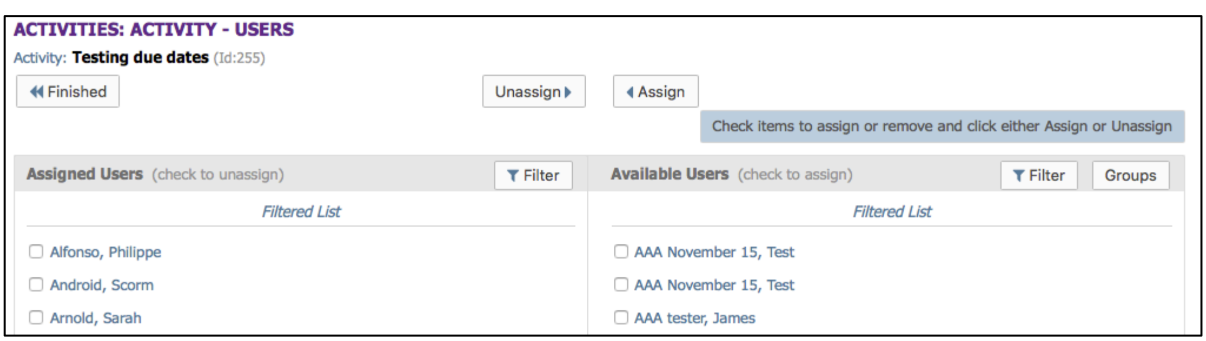


Figure 5-33– Events & Activities: Activity-Users

Note: Activity assignment fields can be edited at any time with additional or updated information. No Edit button is required to update the assignment fields of an Activity record.

5.8.1.3 Activities: Edit an Activity Record

To edit an existing Activity record, select the Activity you wish to edit from the list of Events & Activities: Activities. Once the Activity record has displayed, click the **Edit** button to edit the Activity record. At any time you can select **Save** to save the changes you have make and return to the Activity record, or **Cancel** to return to the Activity record without saving any changes.

5.8.1.4 Activities: Delete an Activity Record

To mark an Activity as Inactive or Request delete, select Events & Activities: Activities, then select the Activity you wish to change the status for from the list. When the Activity record is displayed, click the **Edit** button.

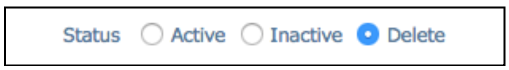


Figure 5-34– Events & Activities: Delete Activity Record

From the Activities: Activity Edit screen, at the Status field, select Inactive or Request Delete. Choose the Inactive status if you plan on using the Activity again in the future, and are not ready to mark it for deletion. Choose Active status if you would like to use an Inactive Activity again. Choose the **Delete** status if you do not plan on using the Activity again in the future and would like to mark it for deletion.

Click the **Save** button to activate your status change. The Status field will now show the requested status change, the date/time and person who requested it , and a highlight marker (**Yellow** = changed to Inactive, **Pink** = changed to Request delete.)

Click the **List** button to return to the list of Activities.

Note: Deletion tasks can only be performed by a Site or Root Administrator. When an item's status is changed to "Request delete", an Administrator reviews the request to ensure there is no need for it before performing the delete function(Administration tab > Deletion Tasks option.)

5.8.2 Events & Activities: Activity Sub-Tabs

The **Events & Activities: Activity** record is a detailed description of all the particulars of an Activity. To view and edit an Activity record, select the Activity you wish to view from the list of **Events & Activities: Activities** by clicking on the Activity and the **Events & Activities: Activity** record for that resource will appear. The displayed screen shows the Activity Information section, Action Buttons, Activity Assignments, Advanced options, Triggers, and Games.

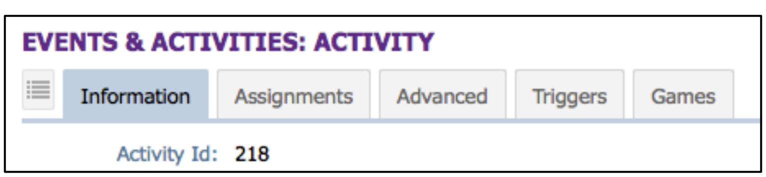


Figure 5-36– Events & Activities: Activity Sub Tabs

5.8.2.1 Events & Activities: Activity Information

Activity Information begins at the top of the screen including fields for Activity Name, description, type, due date, and status. To edit the Activity information, click the **Edit** button and you will be able to edit any of the selected activities' fields.

Action buttons are located across the midsection, allowing you to Edit, Refresh, and Return to the Activity List. To edit an Activity record, click the **Edit** button.

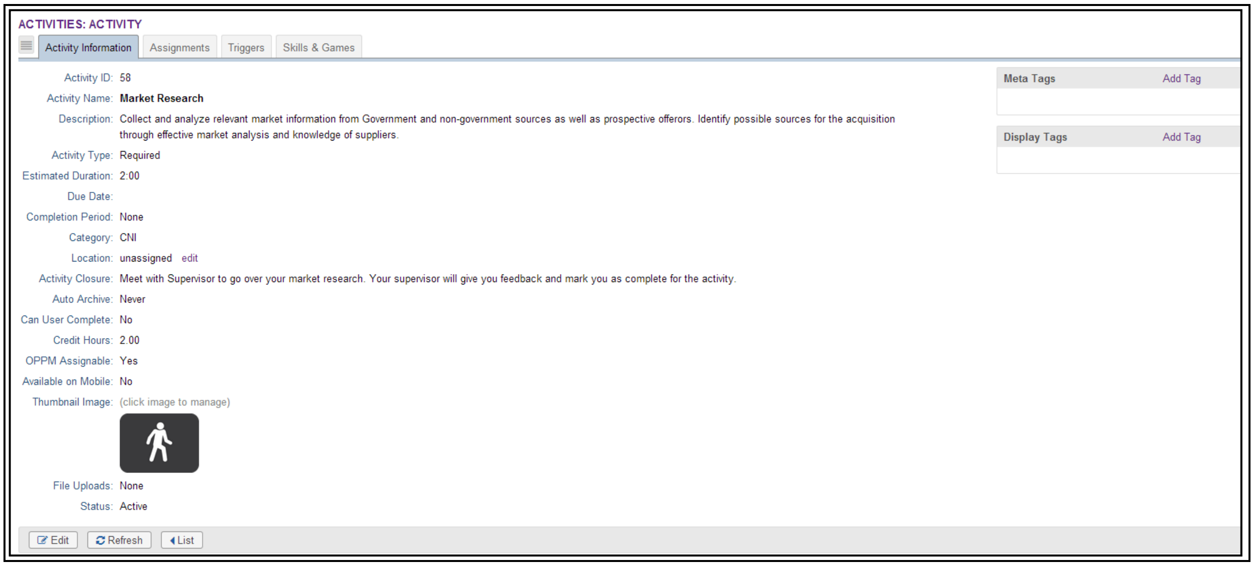


Figure 5-37– Events & Activities: Activity Information

5.8.2.2 Events & Activities: Activity Assignments

These records list out any of the current Assignments for that Activity, including any Users/Groups, job codes, and location Assignments. These assignment fields may be updated at any time by clicking the **Assign** link (the Edit action button is not needed when adding or editing the assignment fields). Click the **View** link to see a list of assigned users.

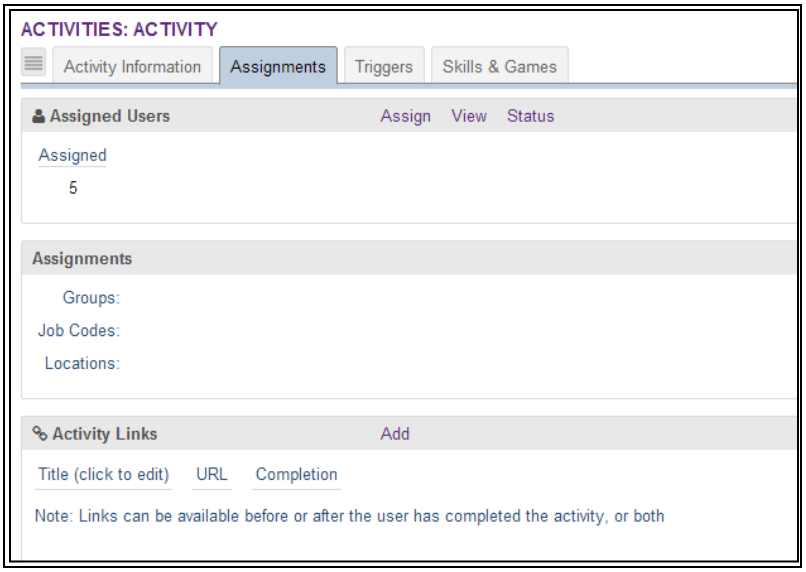


Figure 5-38– Events & Activities: Activity Sub Tabs

Action buttons that appear across the lower portion of the page include the Edit which will allow you to view and edit the data fields for your selected record, the Refresh which allows you to refresh the page with recent updates if needed, and the List option which will return you to the previous listing that you were working from.

5.8.2.4 Events & Activities: Triggers

The Triggers tab allows Administrators to set up automated notifications for the conditions of:

- Assigned to an Activity
- Completed an Activity
- Participated in an Activity
- Recommend Activity
- Reinforce Recommendation Activity

This functionality works identically to the Triggers tab for Events, See the Events -> Sub tabs -> Triggers section for additional information.

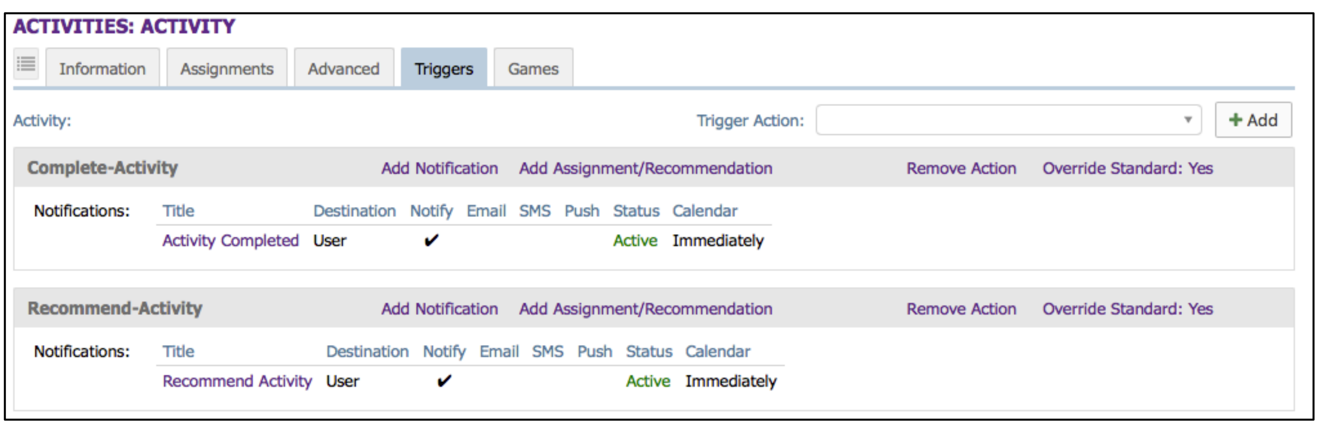


Figure 5-39– Events & Activities: Triggers

5.8.2.5 Events & Activities: Games

The Games tab allows Administrators to set up Activity Game Points that can be associated to a specific Event Activity.

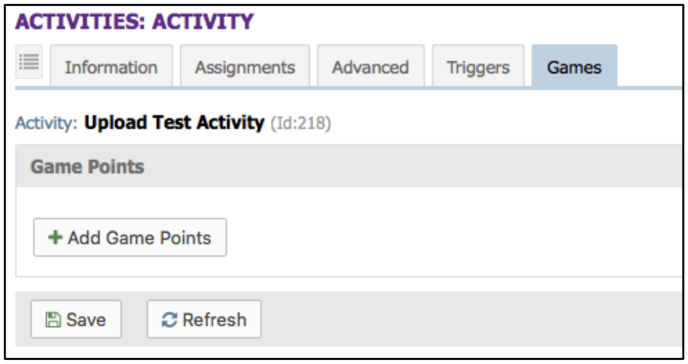


Figure 5-40– Events & Activities: Games

5.9 Events & Activities: Activity Completion

The Activity Completion page displays a database listing of all current Activity Completion records defined in the Course Manager database.

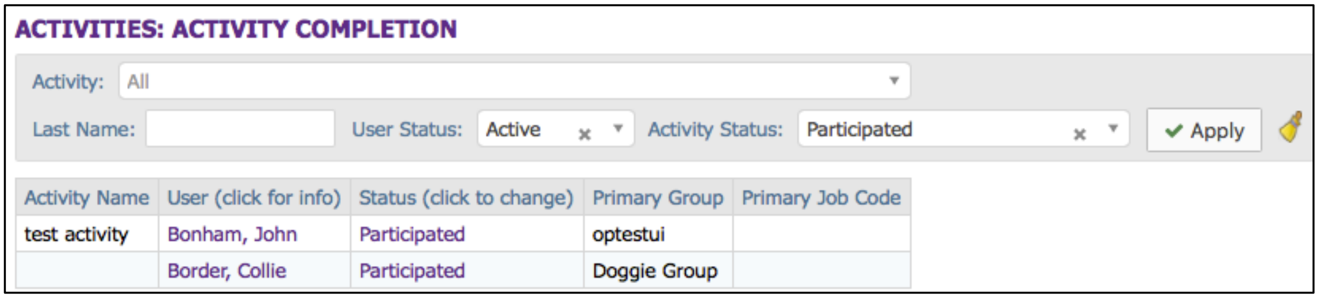


Figure 5-41– Events & Activities: Activity Completion

The Activity Completion table displays the following information:

Events & Activities: Activity Completion	
Element	**Description**
Activity Name:	The name of the Activity.
User:	Displays all of the users that have Activity completion records for the Activity. Users default to display only those users with last names that begin with the letter 'A'.
Status:	Displays the current Status for the listed users.
Primary Group:	Displays the User's Primary Group.
Primary Job Code:	Displays the User's Primary Job Code.

Filter options at the top of the page allow you to sort and filter the display, including:

Events & Activities: Activity Completion Filters	
Element	**Description**
Activity:	Use the drop down to select a specific Activity whose results you wish to display.
Last Name:	Select a letter of the alphabet to display only those users whose last name begins with that letter or select All to display all users.
User Status:	Use the drop down to display only those users with the selected status (All, Active, or Inactive).
Activity Status:	Use the drop down to display only those users with the selected Activity Status (All, Not Completed or Archived, Pending, Participated, Completed, Not Completed, or Archived).

Use the **Apply** button to update the display.

From the displayed list of Activities, you may:

- Click the **User name** link for basic information about the selected User, including Name, Title, Organization, Job Code, Time Zone, Location, and any custom fields you may be using.

- Click the **Status** link for a user to change their status for the Activity or to download the associated file for the Activity that was uploaded by the user (if Activity Upload capability has been enabled and configured on the customer slice). To change the status of the Activity, select the appropriate radio button. Options include: Pending, Participated (waiting approval), Completed (approved), and Not Completed. You may also enter any comments in the Comments text box. Comments are only visible to administrators. Click the file name in the **'Uploaded Activity Files'** to download the associated file for review.

At any time you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

5.10 Events & Activities: Reports

The **Events & Activities: Reports** drop down selection provides several pre-designed reports of **Events & Activities** stored in your Course Manager repository. Reports are listed alphabetically by Report Name. Click on the **Report Name** link to select the report you wish to view.

The following is a list of the **Events & Activities: Reports**. Additional Reports created as jsp's or custom reports purchased from OnPoint can be added to this list using the Manage Reports function under the Administration menu.

REPORTS: Event Reports

No	Report Name	Report Title	Description	Type
652	Activity Comments by Group	Activity Comments by Group	This report lists all comments made for a specific activity for a specific user. This report can be filtered by group and activity.	Standard
653	Activity Completion by Group	Activity Completion by Group	Lists the users assigned to the specified Activity and their completion status for that Activity.	Standard
567	Activity List	Activity List	A list of all active Activities.	Standard
551	Event Assignments by Group	Event Assignments by Group	List of users and the events they are assigned to, filtered by Group	Standard
614	Event Attendance by Group	Event Attendance by Group	List of Attendees, filtered by Group, for a specified event.	Standard
618	Event Attendance by Session by Group	Event Attendance by Session by Group	List of user/learner attendance for a selected event session filtered by Group	Standard

Figure 5-42– Events & Activities: Reports

Most of the reports have a filter option:

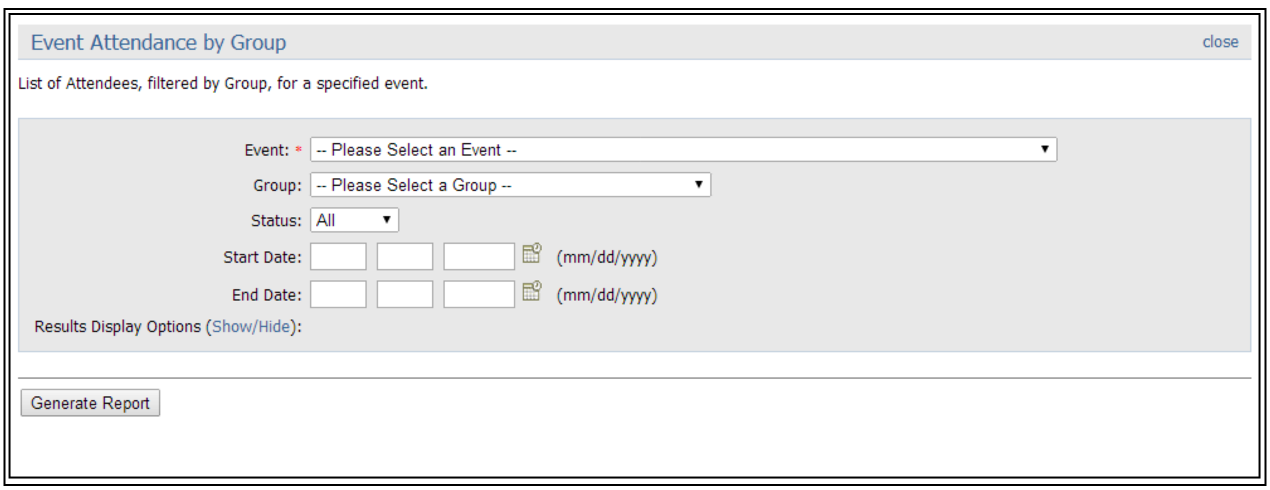
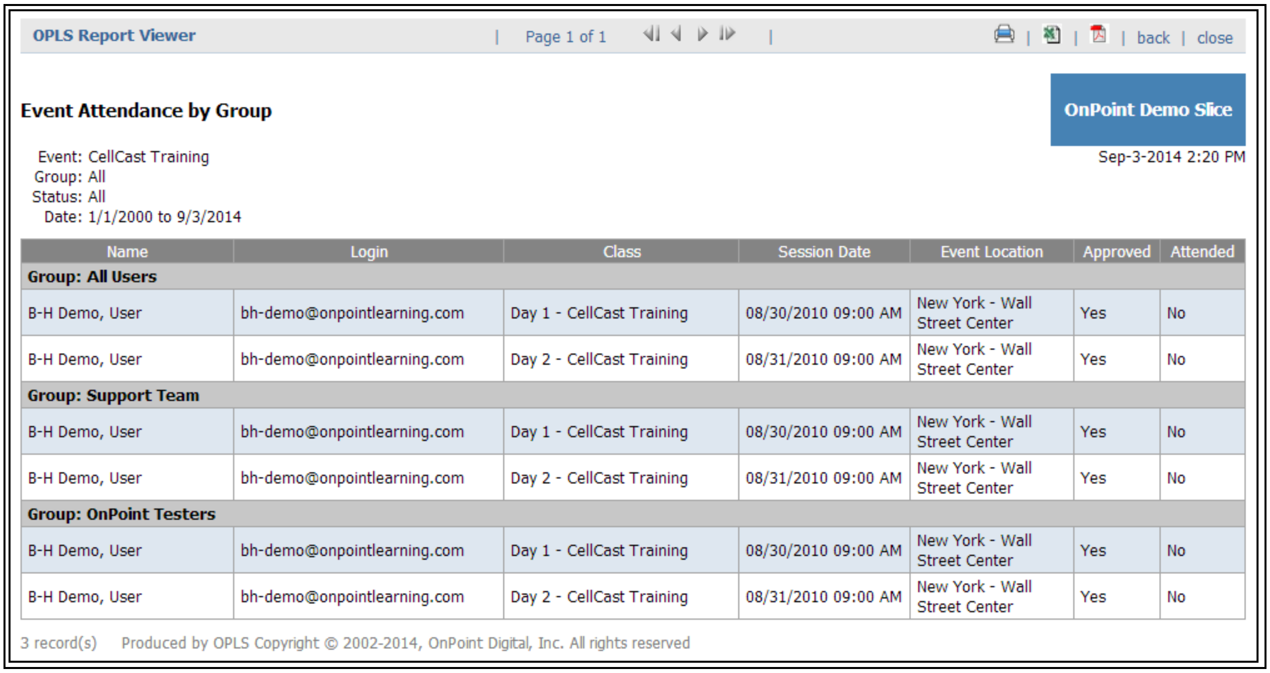


Figure 5-43– Events & Activities: Attendee List

Select your Report criteria from the available drop-down menu options, and click the **Generate Report** button to run the report. The report results will display with the OPLS Report Viewer in a pop-up window.



OPLS Report Viewer | Page 1 of 1 | | back | close

Event Attendance by Group

OnPoint Demo Slice

Sep-3-2014 2:20 PM

Event: CellCast Training
Group: All
Status: All
Date: 1/1/2000 to 9/3/2014

Name	Login	Class	Session Date	Event Location	Approved	Attended
Group: All Users						
B-H Demo, User	bh-demo@onpointlearning.com	Day 1 - CellCast Training	08/30/2010 09:00 AM	New York - Wall Street Center	Yes	No
B-H Demo, User	bh-demo@onpointlearning.com	Day 2 - CellCast Training	08/31/2010 09:00 AM	New York - Wall Street Center	Yes	No
Group: Support Team						
B-H Demo, User	bh-demo@onpointlearning.com	Day 1 - CellCast Training	08/30/2010 09:00 AM	New York - Wall Street Center	Yes	No
B-H Demo, User	bh-demo@onpointlearning.com	Day 2 - CellCast Training	08/31/2010 09:00 AM	New York - Wall Street Center	Yes	No
Group: OnPoint Testers						
B-H Demo, User	bh-demo@onpointlearning.com	Day 1 - CellCast Training	08/30/2010 09:00 AM	New York - Wall Street Center	Yes	No
B-H Demo, User	bh-demo@onpointlearning.com	Day 2 - CellCast Training	08/31/2010 09:00 AM	New York - Wall Street Center	Yes	No

3 record(s) Produced by OPLS Copyright © 2002-2014, OnPoint Digital, Inc. All rights reserved

Figure 5-44– Events & Activities: Event Non-Compliance

Output Data to Spreadsheets

The Output Data to Spreadsheets utility allows you to dump all of the data in a selected database table to a CSV file.

The CSV file can be **Printed**, **Imported** into a spreadsheet or as a **PDF**.

	Note: This functionality is only available in Course Manager, and not in Performance Manager; even if the report is specified to be available in Performance Manager, this icon does not display.

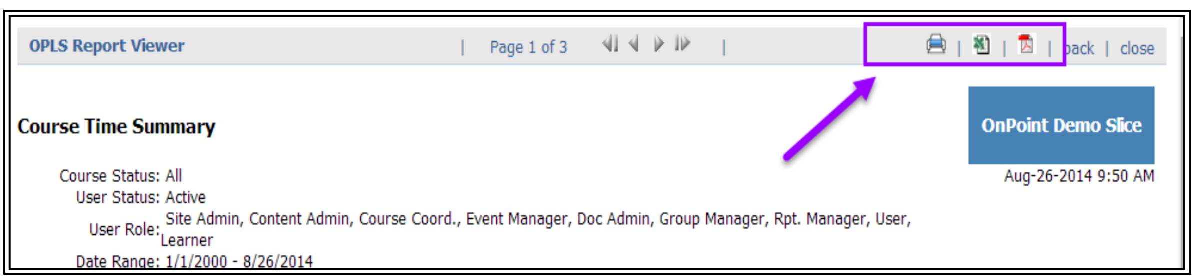


Figure 5-45– Events & Activities: Output to Spreadsheet