

Job Aid: Creating Scheduled Offerings

Prerequisites

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

Description

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

Tasks

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

Terminology:

Scheduled Offering: A scheduled offering is an item or activity scheduled for delivery on a specific date and time.

Segment: Unit of division of an item offering based on duration that facilitates variable resource scheduling.

Task A. Create Scheduled Offering

Note: Verify you are in Learning Admin.

1. Navigate to **Learning > Scheduled Offerings**.

2a. Click the **Add New** link.

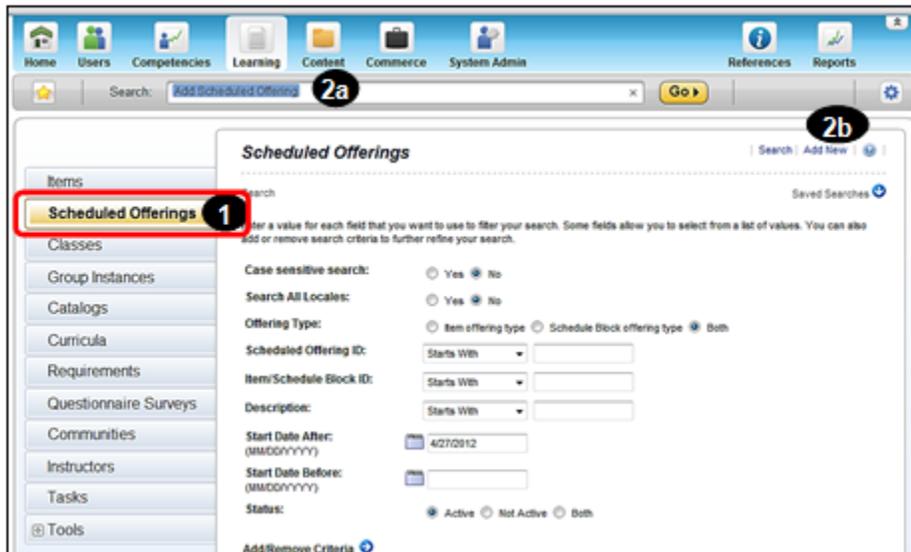
The Scheduled Offering wizard displays.

or

2b. Enter **Add Scheduled Offering** in the Search box.

Click **Go**.

The Scheduling Offering wizard displays.



3. Select the Scheduled offering **Type**.

4. Select the Item Type from the drop down list.

5. Use the search icon (🔍) to search for and select an item.

6. Enter a description of the scheduled offering.

7. Specify or select the appropriate **Domain**.

8. Select whether to publish the scheduled offering in all associated catalogs.

9. Select a start date, start time, and time zone.

10. Click **Preview** to view the basic information for the offering.

The screenshot shows the 'Add New Scheduled Offering' form with the following fields and callouts:

- 3**: Type (radio buttons for Item and Schedule Block)
- 4**: Item Type (dropdown menu)
- 5**: Item ID (text input)
- 6**: Description (text input)
- 7**: Domain (text input, currently showing 'PUBLIC')
- 8**: Catalogs (checkbox for 'Publish in all associated catalogs')
- 9**: Start Date (calendar icon and text input, format MM/DD/YYYY)
- 10**: Start Time (text input, format HH:mm)
- Time Zone (text input, currently showing 'America/Denver')
- 10**: Preview button
- 3. Resources** section:
 - Facility (dropdown menu with green plus icon)
 - Primary Location (dropdown menu with green plus icon)
 - Primary Instructor (dropdown menu with green plus icon)
 - Equipment (dropdown menu with green plus icon)
 - Resource Usage View: Instructor (dropdown menu)

Buttons at the bottom: Save, Cancel.

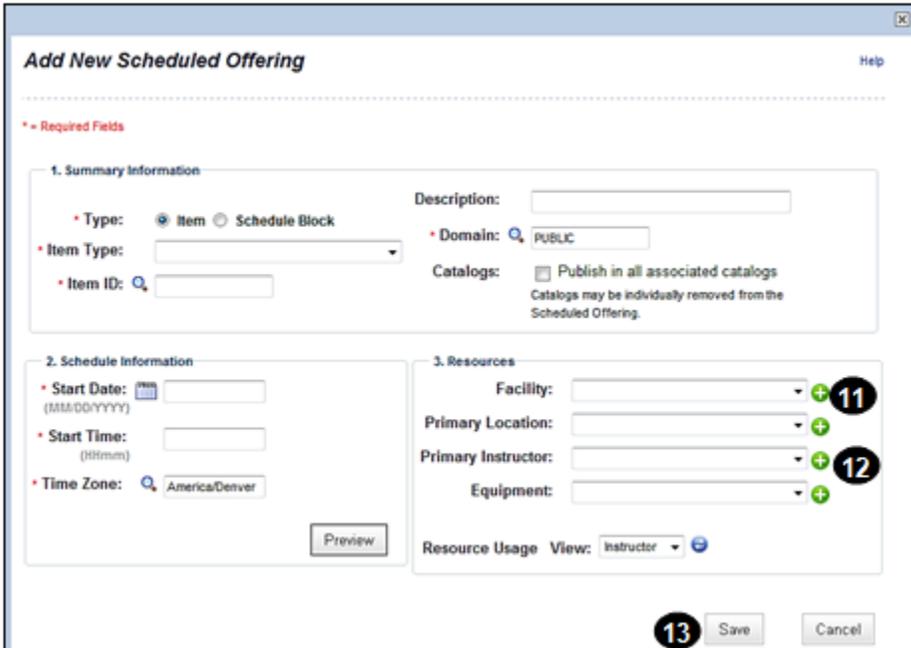
11. Select a facility from the **Facility** drop-down menu.

12. If applicable, select the other resources associated with the scheduled offering: location, instructor, and equipment.

Note: Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.

13. Click **Save**.

If there are any warnings, the Warning Details screen displays. Click **Yes** to continue.



Add New Scheduled Offering

* Required Fields

1. Summary Information

Type: Item Schedule Block

Description:

Item Type:

Item ID:

Domain:

Catalogs: Publish in all associated catalogs
Catalogs may be individually removed from the Scheduled Offering.

2. Schedule Information

Start Date:

Start Time:

Time Zone:

Preview

3. Resources

Facility: + 11

Primary Location: +

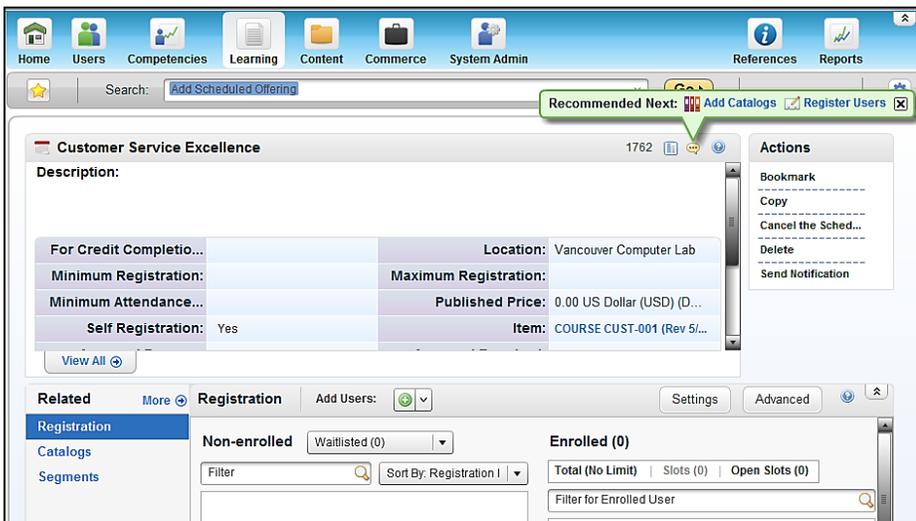
Primary Instructor: + 12

Equipment: +

Resource Usage View:

13 Save Cancel

The scheduled offering record displays allowing you to make further configurations.



Home Users Competencies Learning Content Commerce System Admin References Reports

Search: Add Scheduled Offering

Recommended Next: Add Catalogs Register Users

Customer Service Excellence 1762

Description:

For Credit Completion:	Location:	Vancouver Computer Lab
Minimum Registration:	Maximum Registration:	
Minimum Attendance:	Published Price:	0.00 US Dollar (USD) (D...)
Self Registration: Yes	Item:	COURSE CUST-001 (Rev 5/...

View All

Actions

- Bookmark
- Copy
- Cancel the Sched...
- Delete
- Send Notification

Related More Registration Add Users: Settings Advanced

Registration

Catalogs Segments

Non-enrolled Waitlisted (0)

Enrolled (0)

Total (No Limit) Slots (0) Open Slots (0)

Filter for Enrolled User

Task B. Add Additional Segments

1. Click the scheduled offering **Segments** tab from the Related area.

Note: If necessary, click List View.

2. Click the **Copy Segments** icon (📄).

The screenshot shows a table with the following columns: Description, Primary Location, Primary Instructor, Virtual, Actions, and Remove. A row is highlighted with a yellow background. A circled '1' points to the 'Segments' tab in the 'Related' area, and a circled '2' points to the 'Copy Segments' icon in the 'Actions' column of the highlighted row.

Description	Primary Location	Primary Instructor	Virtual	Actions	Remove
Mon 4/30/2012 0900 - 1700 OJT S	Vancouver Computer ...	Instructor Virtual		Attendance	<input type="checkbox"/>

3. Enter the number of times to copy the segment.

4. Click **Copy**.

The dialog box titled 'Copy Daily Segments' contains the following text: 'The schedule times listed below will be copied and appended to the end of this scheduled offering.' Below this, it says 'Scheduled Offering: Customer Service Excellence (1762)'. A table lists the segment details, and a text input field is labeled '*Number of Times to Copy:'. A circled '3' points to the input field, and a circled '4' points to the 'Copy' button at the bottom.

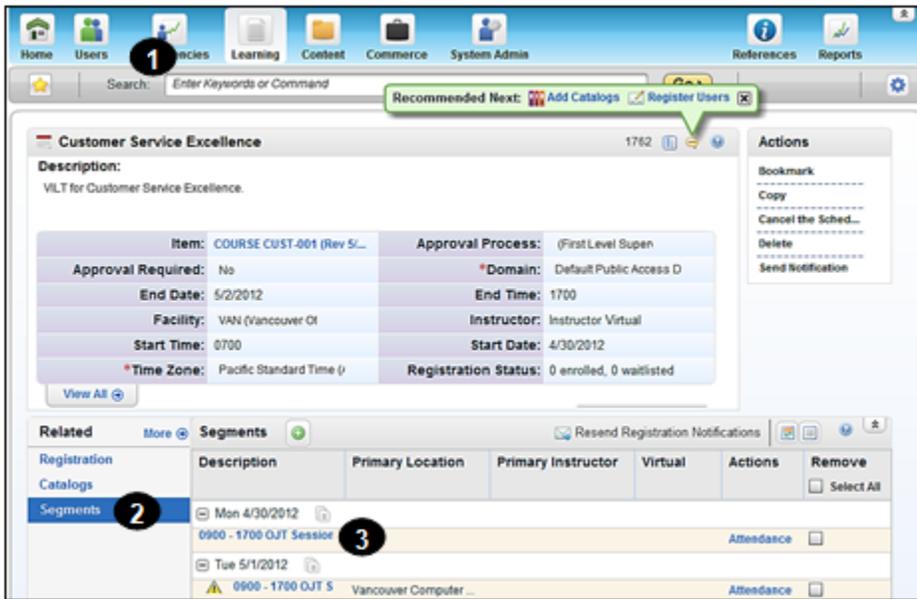
Segment	Schedule Times	Location	Instructor
OJT Session	4/30/2012 0900 - 1700	Vancouver Computer	Instructor Virtual

*Number of Times to Copy: 3

4 Copy Cancel

Task C. Add Additional Resources

1. Search for and access in edit mode a scheduled offering record.
2. Select the **Segments** tab from the Related area.
3. Click the segment link for the segment you wish to add resources.



The screenshot shows the TMS interface for a scheduled offering record. The record is titled "Customer Service Excellence" and has a description "VLT for Customer Service Excellence." The record details include:

Item:	COURSE CUST-001 (Rev 5/...	Approval Process:	(First Level Supen
Approval Required:	No	*Domain:	Default Public Access D
End Date:	5/2/2012	End Time:	1700
Facility:	VAN (Vancouver OI	Instructor:	Instructor Virtual
Start Time:	0700	Start Date:	4/30/2012
*Time Zone:	Pacific Standard Time (p	Registration Status:	0 enrolled, 0 waitlisted

The "Related" section shows the "Segments" tab selected. The "Segments" table has the following data:

Description	Primary Location	Primary Instructor	Virtual	Actions	Remove
Mon 4/30/2012 0900 - 1700 OJT Session				Attendance	<input type="checkbox"/>
Tue 5/1/2012 0900 - 1700 OJT 5	Vancouver Computer ...			Attendance	<input type="checkbox"/>

For the selected segment, select a primary instructor.

4. Click **Add Resources**.
5. Select **Add Instructor**.

6. Click the corresponding checkbox to select the instructor to add for the segment.
7. Click **Add**.

Instructor ID	Instructor Name	Related User	Availability
AMDBEVERLY	Beverly, Amanda D		Available for Entire Scheduled Offering <input type="checkbox"/>
AHARVEY	Harvey, Andrew		Available for Entire Scheduled Offering <input type="checkbox"/>
SLSVLS	Virtual, Instructor		Not available <input checked="" type="checkbox"/>

8. Identify the primary instructor and click the corresponding radio button in the **Primary** column.
9. Click **Apply to All Segments** at the segment level to copy the new resources to all segments of the scheduled offering.
10. Click **Save and Close**.

Edit Segment ✕

***Required**

* Start Date: * Start Time:

* End Date: * End Time:

* Time Zone:

Description:

Resources **9**

Type & Title	Primary	Remove
Location		
CLASS - Vancouver Classroom 01	<input type="radio"/>	<input type="checkbox"/>
Instructor		
Virtual, Instructor	<input checked="" type="radio"/> 8	<input type="checkbox"/>

10

Task D. Copy Scheduled Offering

1. Search for and access in edit mode a scheduled offering record.
2. Click Copy in the Actions area.

Home
Users
1 Policies
Learning
Content
Commerce
System Admin
References
Reports

Search:

Recommended Next: Register Users ✕

Customer Service Excellence 1762

Description: VILT for Customer Service Excellence.

Item: COURSE CUST-001 (Rev 5/...	Approval Process: (First Level Supen	
Approval Required: No	* Domain: Default Public Access D	
End Date: 5/2/2012	End Time: 1700	
Facility: VAN (Vancouver OI	Instructor: Instructor Virtual	
Start Time: 0700	Start Date: 4/30/2012	
* Time Zone: Pacific Standard Time (P	Registration Status: 0 enrolled, 0 waitlisted	

Actions

2

3. Set copy preferences by checking associated boxes.

Note: Click *Help* for additional information on each option.

4. Select a copy frequency.
5. Select the first scheduled offering copy start date.
6. Set the frequency to copy the scheduled offering.
7. Click **Next**.

Note: If you choose an option other than Copy Single, enter a scheduling frequency as seen in the screen capture for this step. This determines how many new offerings are created and how frequently they are scheduled.

8. Confirm copy results. (Visual confirmation only.)
9. Click Copy.

 Copy' button with a circled '9' next to it." data-bbox="61 236 625 528"/>

Copy

Scheduled Offerings

> Copy Scheduled Offering

Copy the Scheduled Offering 8

Scheduled Offering ID: 1762
Title: Customer Service Excellence

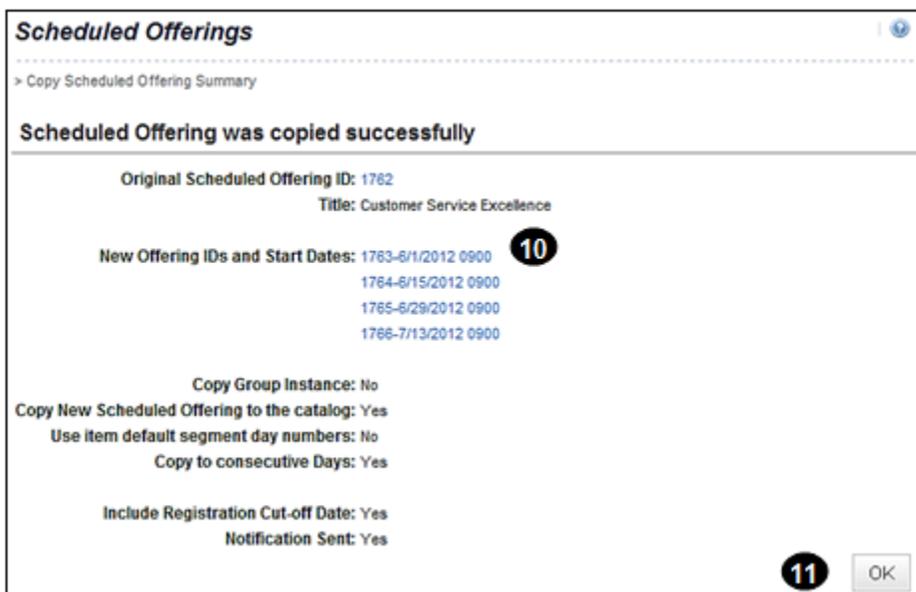
Copy Group Instance: No
Copy New Scheduled Offering to the catalog: Yes
Use item default segment day numbers: No
Copy to consecutive Days: Yes

New Start Dates: 6/1/2012 0900 America/Denver
6/15/2012 0900 America/Denver
6/29/2012 0900 America/Denver
7/13/2012 0900 America/Denver

Include Registration Cut-off Date: Yes

Send Notification: Copy 9

10. Once the copies are created, you can access them with the links on the final screen.
11. Click OK.



Scheduled Offerings

> Copy Scheduled Offering Summary

Scheduled Offering was copied successfully

Original Scheduled Offering ID: 1762
Title: Customer Service Excellence

New Offering IDs and Start Dates: 1763-8/1/2012 0900 10
1764-8/15/2012 0900
1765-6/29/2012 0900
1766-7/13/2012 0900

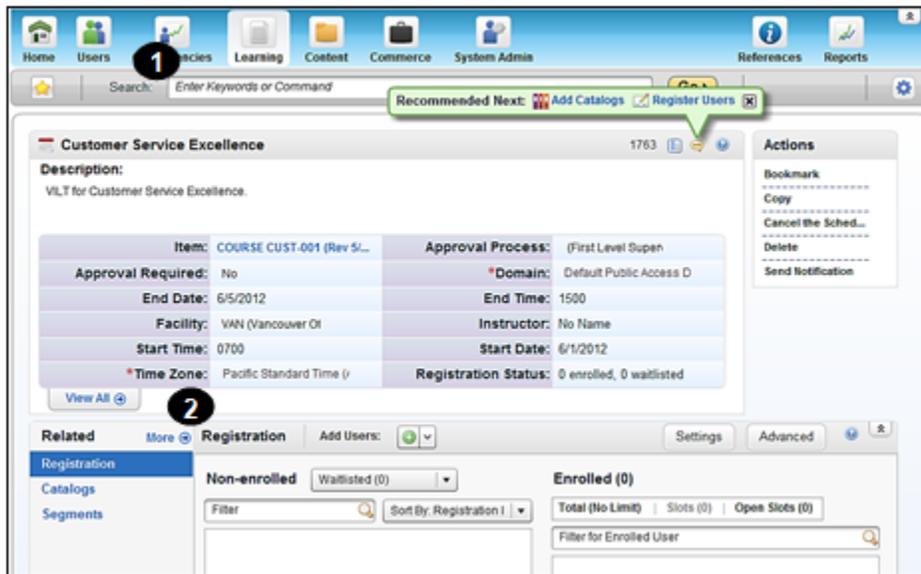
Copy Group Instance: No
Copy New Scheduled Offering to the catalog: Yes
Use item default segment day numbers: No
Copy to consecutive Days: Yes

Include Registration Cut-off Date: Yes
Notification Sent: Yes

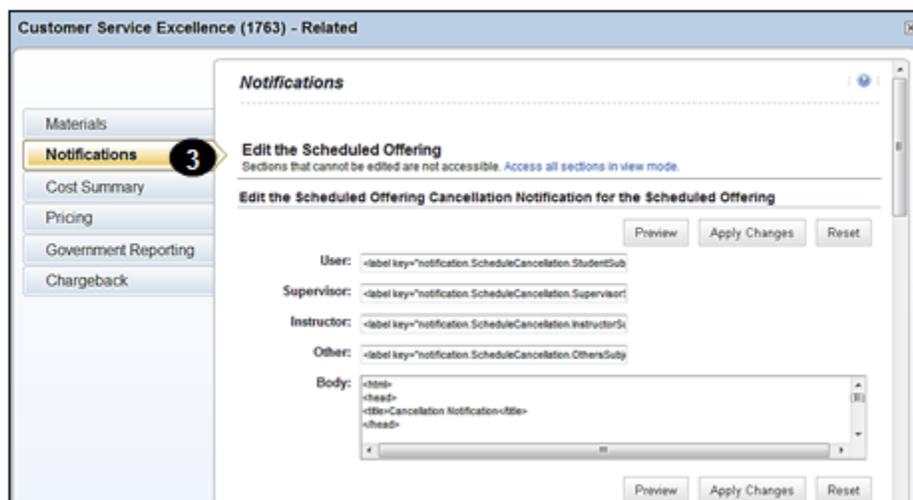
11 OK

Task E. Edit Scheduled Offering Notifications

1. Search for and access in edit mode a scheduled offering record.
2. Click **More** from the Related area.



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



4. Scroll down to view the notification you wish to edit.

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

- Offering Cancellation
- User Registration

- User Withdraw
- User Waitlist
- User Waitlist Removal
- User Pending Status

5. Click **Preview** to view the notification.

Edit the Registration Notification for the Scheduled Offering

4 Preview Apply Changes Reset

User: <label key="notification.Enrollment.StudentSubject"/> - <&

Supervisor: <label key="notification.Enrollment.SupervisorSubject"/> -

Instructor: <label key="notification.Enrollment.InstructorSubject"/> - <

Other: <label key="notification.Enrollment.OthersSubject"/> - <&S

Body: <html><head><title>Enrollment Notification</title></head>

5 Preview Apply Changes Reset

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

This note confirms your registration in the following learning activity:

 <i><SCHED-CPNT></i>
 <!-- ITEM KEY -->
 <a href =
 'http://pcdemo.plateau.com/plateau/user/deeplink.do?linkId=SCHEDULED_OFFERIN
 G_DETAILS&scheduleID=URLENCODE value="<SCHED-ID>"/'>
 <SCHED-DESC>
 <!-- SCHEDULE Offering Description-->

7. To modify the body of the notification, locate the body section and add text.

You may remove existing labels and tags, or add text around them.

8. Click **Apply Changes**.

Note: Click **Help** for more information on syntax tags and how to use them in notifications.

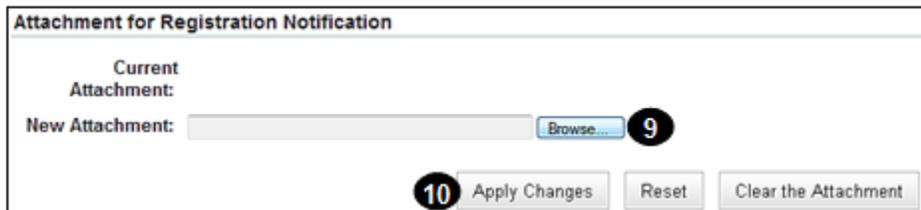
Body: <html><head><title>Registration Notification</title></head>

7

8 Preview Apply Changes Reset

9. To attach a document to the notification, click **Browse** to search for and select the document.

10. Click **Apply Changes**.



The screenshot shows a web form titled "Attachment for Registration Notification". It contains a "Current Attachment:" label above an empty text field. Below this is a "New Attachment:" label above another empty text field. To the right of the "New Attachment:" field is a "Browse..." button, which is circled with a black circle containing the number 9. At the bottom of the form are three buttons: "Apply Changes" (circled with a black circle containing the number 10), "Reset", and "Clear the Attachment".