

To Schedule a Workshop:

Quick Overview:

1. Find Class Template for the workshop
2. Check the Class Template for accuracy and completeness
3. Select “New Class From”
4. Change the Start Date
5. Check “Reset Dates”
6. Save the new class
7. Modify ID Data tab if needed (time, time zone, address, etc.)
8. Check the Content Tab – make sure there is (1) Instructor-led object; (2) Attendance Certificate; (3) Online Test; (4) Completion Certificate
9. Check the Info tab – Add anything needed to the description, outline, objectives. (This should all be there from template)
10. Check the Mail tab – CEU/ Non-CEU emails, hotel emails, etc.
11. Add to the Resources tab: Instructor, Room, and Admin

Steps:

1. Find Class Template for the workshop
 - a. In the Admin Center, go to the CLASSES tab.
 - b. Use the Advanced Search to enter Course Code or Name, Owner and set the Start Date to 1/1/99, click Search
 - i. Click “Advanced” from the left menu
 - ii. Enter either course code, part of a class name, or leave blank to get all class templates. (use % as Wildcard)
 - iii. From the Start Date drop-down, select “On” (default will be “On or after”), then enter 1/1/99 (All courses and class templates have a start date of 1/1/99)
 - iv. You also want to filter your search to only Branch 23 classes. Two drop downs will say Course Code, change one to “Owner” and then select your branch.
 - v. Click Find.

Find Class

Criteria Results

From: To:

Course Code:

Name:

Start Date:

Locator Number:

From: To:

Owner

Course Code

Type(s): Active - Upcoming
 Active - Past
 History

Views:

- c. Select the appropriate Class Template from list
- d. If you cannot find the appropriate class template, call HO Training so we can create one for you or help you find it. Do not create classes from the course. The course doesn't have certificates and test, and usually doesn't have resources. We set those at the class template level for each branch.

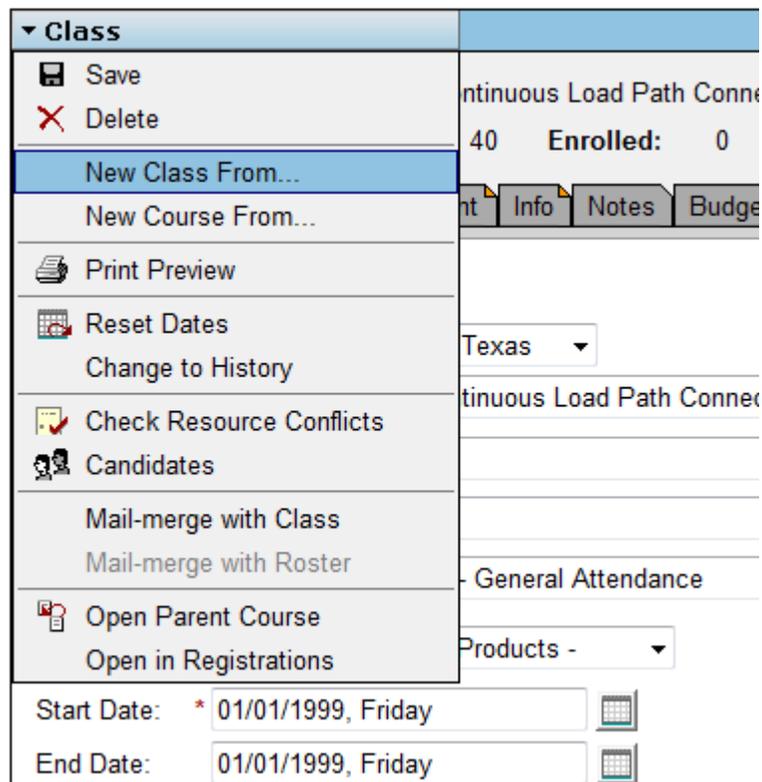
Criteria Results

Start Date	Course Code	Class Name	Owner	Hours
01/01/1999	PK-SSTWFS	BR023 Template-Continuous Load Path Connections	23	1.00
01/01/1999	PK-SSTWFSF	BR023 Template-Continuous Load Path Connections - Florida Code	23	1.00

2. Check the Class Template for accuracy and completeness
 - a. Make sure this is the correct class you want. Check to see that contact hours, credits offered, etc is correct.

Note: All of these can again be changed or modified in the CLASS, but you should try to keep the Class Template as accurate and complete as possible, so each time you give a CLASS it will fill in the blanks correctly. We can create more class templates for you if they are needed.

3. Select "NEW CLASS FROM" From the blue CLASS drop-down menu at the top left of the frame



4. Change the START DATE in the class to the appropriate date
 - a. Select the appropriate Time Zone for the class location
5. Click "RESET DATES" This will reset all associated date fields like mail, sessions, wait lists etc. the correct relationship for this particular class
6. Save the NEW CLASS
7. Modify Class Information on the ID Data tab

- a. Remove “BR023 Template” from the Class Name.
 - b. Check Start and End time, time zone, location information
8. Check the Content tab
- a. Make sure there is (1) Instructor-led object; (2) Attendance Certificate; (3) Online Test; (4) Completion Certificate
 - b. If something is missing, contact HO training so they can add the correct certificates and test.
 - i. **Important:** If you are waiting on a test, make sure you DO NOT finalize a class or change statuses to Attended after the class. If you do, participants will get an email instructing them to take a test that is not there.

Type	Content Object Name	Inc. Score	Score Multiplier	Comp. Req.
	Instructor-Led Workshop			Required in order
	Certificate of Attendance			Available in order
	Continuous Load Path Connections	✓	1	Required in order
	Online Test			Available in order
	Certificate of Completion			Available in order

9. Check the Info tab
- a. Add anything needed to the description, outline, objectives that is specific to this class. (In most cases this will all be there from template)
10. Check the Mail tab – CEU/ Non-CEU emails, hotel emails, etc.
- a. Attendance and Completion emails will have “CEU” or “Non-CEU” in the name. These *should* be all set correctly from the template, but always check to make sure.
 - b. Make sure you have the correct hotel or non-hotel emails
11. Add to the Resources tab: Instructor, Room, and Admin associated with same date
- a. Go to the Resources tab in the class and search for the instructor and room and add to class. Make sure the time is correct. Some of the resources may already be there from the class template
- Note:** If you need to create a NEW RESOURCE go to CLASS RESOURCES and create a “New Class Resource” or New Resource From...” OR call HO training and we can create one for you.