

# Workshop Scheduler Admin Manual

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## What is the Workshop Scheduler?

The Workshop Scheduler is a browser-based application designed specifically to authenticate users to self-register for workshops scheduled on campus. Workshop Scheduler can be accessed over the internet using a standard browser (Internet Explorer, FireFox, Safari) with any operating system (Windows, Mac, Linux).

A workshop in this context is a scheduled meeting open to any university member that may have a limited number of participants, either because of room size or availability of equipment or other resources used in the workshop. Users must have a university log-in

(usually the name part of the email address assigned to the user) and have an active account with the university. When users log into the Workshop Scheduler system, the log-in ID is authenticated with the university's identification system (Banner).

When the maximum number of participants have registered for a workshop, subsequent users can only sign up for the Wait List, until the maximum number is signed up, after which registration for the workshop is closed. This manual explains additional features of the system for streamlined management of workshop registration and attendance.

## Process to Create a Workshop Scheduler Community

1. Determine who will be the Community Administrator. This person creates workshops and workshop sections, assigns workshop leaders, and likely publicizes workshop events. (It is assumed that "you" will be the Administrator.)
2. Request the creation of a Community for your department by creating a Technical Support incident (see page 12). In the **Description** field:
  - a. include a name for your community that clearly identifies the types of workshops presented by the community (maximum 40 characters);
  - b. include the log-in ID for the Community Administrator. Workshop Scheduler Administrator Privileges must be applied to your Banner ID before you can log in as Admin. This process may take several days.
3. Determine the Types of workshops to be conducted. You must have at least one Workshop Type to add a Workshop.
4. Determine the Workshop Leaders (instructors) who currently conduct workshops.
5. When you receive notice that your Banner record has been updated with the Workshop Scheduler Administrator Privileges, you may begin to set up the Community and add workshops.
  - a. To log into the Workshop Scheduler, go to [workshops.appstate.edu](http://workshops.appstate.edu) in any web browser.
  - b. In the top right corner of the screen select the **Log In** link.
  - c. Use your ASU User ID and Password to log in.
  - d. If you have authorization as a Workshop Scheduler Administrator (step 2.b above) or Leader, you will see the link for **Admin** after your name in the top right corner of the screen.
    1. The Administrator can edit the Community, create and edit Workshops and Sections for the Community, add and remove Leaders.
    2. A Leader can create Workshop Sections in the Community and edit his/her profile.
  - e. Select the **Admin** link to display the Administration screen.
6. See the topics in this manual for details to complete these steps:
  - a. Edit the Community properties, and add one or more Leaders. see Communities, page 5
  - b. Create at least one Workshop Type. page 6
  - c. Add a Workshop to the Workshop Listing. page 8
  - d. Add a Workshop Section. page 9
  - e. Publicize your workshop. page 11

## Terminology in the Documentation

**user** : a visitor to the Workshops web site who can sign up to participate; participants must be registered with the ASU Banner database (student, faculty, or staff with a current ASU ID)

**participant** : a user who has successfully registered for a workshop

**community** : a department or office on campus that conducts workshops

**Community Administrator** : each community has an Administrator who creates and maintains the workshop schedule; the Community Administrator is listed with the Leaders in the Community

**Leader** : a member of the community who leads one or more Sections of a Workshop as an instructor or facilitator; a Leader has less administration access than the Community Administrator

**workshop** : a community conducts a workshop on a specific topic; a workshop can be presented multiple times

**workshop section** : each presentation of a workshop is scheduled as a section with a specific meeting date and time; a workshop can have an unlimited number of sections

NOTE: Workshop Scheduler does not prevent scheduling workshops with date/time and location conflicts. It is the Administrator's responsibility to schedule accurately.

**Workshop Administrator** : a member of the community who is the primary contact and administrator for a workshop; the Workshop Administrator can be the Community Administrator or a Leader in the Community

## WORKSHOP ADMINISTRATION MENU

### *My Workshops*

View a list of the workshops for which you (the logged-in Administrator or Leader) are the Instructor. By default this list displays workshops that are scheduled to occur on or after today's date. To see previously scheduled workshops, change the Show Section On or After Date.

Specify how many rows of workshops appear on this page by selecting the number of **Items Per Page** to display at the top right of the workshop listing.

Select the **edit** link by a workshop listed to modify the settings for the workshop section.

Select the **roster** link to view and modify the participants signed up for the workshop.

When you close the Edit Section or Edit Roster screen, the screen displays all the sections for that workshop. Select the **My Workshops** menu link again to see all your workshops.

## *My Profile*

A profile can be edited only by the logged-in Administrator or Leader it belongs to. Enter information that will appear with workshop descriptions for which you are the Administrator and Workshop Sections for which you are the Instructor. **Browse** to select a JPEG (JPG) image file for My Mug Shot to include your picture as well. The image will be displayed 105 pixels wide by 135 pixels high; you may need to edit an existing picture accordingly so that it displays with the correct proportions.

Click the **Submit** button in the top right to save changes.

## *Workshop Listing*

All workshops (not sections) that match the filters under FIND A WORKSHOP (to the left) are listed. Click the Name, Start Date, or Type column head to sort by that column (default sort is by Name). Select the number of **Items Per Page** to display on this screen in the upper right corner of the list. If the list continues on additional screens, use the links for the pages in the center above the list to display the rest of the list.

Filter the list with the fields in the FIND A WORKSHOP menu.

- Select a Community to see only workshops under that Community. You can only edit workshops for the Community in which you are an Administrator.
- Select a Workshop Type (after selecting a Community) to list only workshops of that type.
- You can find workshops by a portion of the Name by entering text in the field, then click the **Go** button. Only workshops in the list as it is currently filtered by Community and Type are searched.
- Turn on the Search Description option to include the Description text when searching for the text entered.
- Click the Reset link to clear all filters and display all workshops in All Communities.
- These same filters are displayed on the Workshop Schedule page at workshops.appstate.edu with an additional Date filter, which displays a calendar. Dates with workshops scheduled are highlighted; click on a highlighted date to display workshops scheduled on that date. Click on a workshop description to display the Registration Screen for that workshop.

Select the **Add Workshop** link to create a new workshop for your Community. You can schedule the first section of a new workshop when you create it.

Click the **Edit** link to modify the details for a workshop.

Click on the **Sec(tion)** link to view a list of all the Workshop Sections for that workshop that are scheduled to occur on or after the specified date (which defaults to today). To see previously scheduled workshops, change the Show Section On or After Date. To include workshop sections marked Inactive, turn on the Show Inactive option.

Click on the **Del(ete)** link to delete a workshop. You can only delete workshops for the Community in which you are an Administrator. Deleting a Workshop removes all records of the Workshop including all Sections and Registrants. This action cannot be undone. Confirm the delete by selecting **Submit** on the confirmation screen; or **Cancel** to retain the workshop.

## ***Communities***

You can only edit the Community for which you are an Administrator.

On the Edit Workshop Community screen you can edit the Description (name) of the community as it appears on the Workshop Scheduler site (maximum 40 characters). Users can filter the display of available workshops by community, so the name should clearly identify the types of workshops presented by the community.

To add Leaders (instructors) in your community who can be selected for workshops, enter the ASU User ID (email address without **@appstate.edu**) in the field on the right and click the **Add** button. Full names are listed below. These users will have Leader security privileges.

Automatic email notifications use the default sender specified in the **From Email Name** and **From Email Address** fields. If these are left blank, the default reply address for emails is `workshop-no-reply@lts2.appstate.edu` with no name. Note that notifications for all workshops in a community will be from the same person.

The **Email Opening** and **Email Closing** text blocks appear in automatic emails for workshops in your community. Information specific to the workshop the user signed up for is included in the body of the email message. **Modify these email notices with information appropriate for your Community, including who is to be contacted with questions.** You may want to include instructions for dropping from a workshop roster.

Automatic emails are sent when a user signs up for a workshop (Confirmation), when a user on the Wait List is promoted to an available seat, and when a user is dropped from a roster. This is an example of the Confirmation email, which includes an attached Calendar Event for the workshop. The information in [brackets] comes from the registration database record:

[Participant's Name],

[Email Opening here, example:] This is an automated email notification.  
Please address any questions to the workshop Leader below.[end of Opening]

This email has been sent to confirm your registration for the ASU workshop:

[Workshop Name]

Date: [Day, Date, Time of Workshop]

Location: [Location]

Leader: [Leader's Name and email address]

You can see a list of your workshops at  
<http://workshops.appstate.edu/auth/myshops.aspx>

[Email Closing here, example:] If you are registered and unable to attend, please DROP yourself ASAP to allow room for others:

1. Go to [workshops.appstate.edu](http://workshops.appstate.edu)
2. Select My Workshops (top right). Log in with your ASU User ID.
3. Select the Drop link. The next person on the Wait List will be enrolled and the leader will be notified.

If you did not register for this workshop and have received this email in error, please contact the leader or call ... [end of Closing]

## ***Workshop Types***

Existing Workshop Types for your Community are listed. Specify how many rows of workshop types appear on this page by selecting the number of Items Per Page to display at the top right of the listing.

Click **Add Workshop Type** to categorize the different workshops within your community. Enter a **Code** (short abbreviation) and **Desc**(ription) of the type, then click the **Submit** button in the top right corner of the screen.

Click the **edit** link beside an existing workshop type to modify the Code or Description text or to upload a Logo Image used to identify workshop listings of that type. The image must be a GIF file that will be displayed 57 pixels wide by 55 pixels high. If the logo is not square, its background should be transparent. Consult someone knowledgeable in web graphics to help with constructing your logo.

## ***Participants***

As an Administrator you can search for users who have registered for past or current workshops on the Registrant Search screen. Enter the User ID then click **Go** to return a list of workshops for which the user registered and the final Status of the registration: Dropped, Wait Listed, Completed (set on the Roster screen), or blank which indicates Status was Not Set.

Select the number of **Items Per Page** to display on this screen in the upper right corner of the list. If the list continues on additional screens, use the links for the pages in the center above the list to display the rest of the list.

## **Roster Screen**

Select **roster** from the Workshop Sections or My Workshops screen to display the very useful Roster screen.

The Section, Workshop name, Date and time, Leader (instructor), Community, and Workshop Type are displayed at the top.

The **Email Class** link opens a new email message with all current registrants email addresses in the To field. This is useful for sending a notice to all participants. Users who have dropped from the roster are not included.

To **Register User** for the workshop enter the User ID, specify the **Workstation** type (Mac or Windows) if the option is displayed, then click the **Register User** button; an email notification will not automatically be sent to the participant.

HINT: Use the People Search on the appstate.edu web site to find a person's User ID (the name part of the email address).

Select **drop** link beside a name to remove that user from the roster (on or before the day of the Workshop Section); an email notification will not automatically be sent to the participant.

Select **promote** link beside a name to manually promote that user from the Wait List to a seat in the workshop section; an email notification will automatically be sent to the participant.

NOTE: When a user is registered or promoted by an Administrator from the Roster screen, the user is enrolled regardless of the Max Enrolled limit. Any user on the Wait List will not automatically be promoted until the number of participants enrolled, including the manually registered participant, falls below the Max Wait List limit.

### ***Marking Attendance***

On the date of a workshop the **Status** column displays the **Not Set** link. Click on the link to toggle the status to **Completed**. This can be used to indicate which participants actually attended the workshop. A Completed status is reported for the workshop on a Participant's workshop history (displayed by selecting the My Workshops link in top right corner after logging into workshops.appstate.edu).

Use the **Show Less** button at the bottom of the roster to hide some of the controls on this screen, so in a classroom with an instructor's station and projector, you can display the Roster screen for a workshop. Use a larger text size for the browser to make the screen easy to read. Participants arriving can see they are in the right place.

As you begin the workshop you can call the roll from the roster listing and change the Status to Complete for those in attendance by clicking the **Not Set** link. This gives you an opportunity to identify your attendees by name. Print this screen later to have a record of attendance.

Alternately, you can print this page to create a roll that you can mark or pass around so attendees can initial. After the workshop you can set the Status on the Roster screen from the roll sheet.

Click the **Show More** button to display the full view of the Roster screen.

Click the **Done** button in the top right corner of the screen after viewing or making changes to the roster. The Workshop Sections screen for the workshop is displayed. Select My Workshops from the Workshop Administration menu to return to the list of your scheduled workshops.

## Add/Edit Workshop

NOTE: Before you can create a workshop, you must create a Workshop Type to assign to it. see page 6

HINT: You can move to the next field on the screen by pressing the Tab key.

From the Workshop Listing screen, click the **Add Workshop** link to create a new workshop; or click the **edit** link beside an existing workshop to modify it.

Enter a **Workshop Name**. The name is used to as the title for the workshop, so it should be descriptive enough to draw users that would be interested. Maximum length is 50 characters.

**Community** defaults to the logged-in Administrator's Community. You cannot create workshops outside your Community.

Select the **Workshop Type**. Modify the Types list from the link on the Workshop Administration menu.

Select a **Workshop Administrator** for the workshop from the list of Leaders and Community Administrators. Modify the list of Leaders from the Edit Communities screen using the Communities link on the Workshop Administration menu.

Optionally include an **More Information URL** to display a link with the workshop description with more information for users.

The **Station Type** option specifies whether users should select between a Windows or Macintosh computer for the workshop. No Prompt removes the option from the Registration Screen; Optional displays the option, but does not require a selection; Required displays the option and prompts the user if a selection is not made.

Select the notifications to **Copy Email to Administrator when Registrant is Notified**: when each participant signs up (Confirm Reg.), drops (Confirm Drop), or is promoted from the Wait List to an open seat (Promote WL). Participants always receive these notifications; select these options if you want to receive the emails as well.

Enter the number of days before a workshop to send an automatic email **Reminder** to all registered participants. Leave the field blank to prevent the automatic reminder.

Enter text blocks that describe the workshop.

**Learning Objectives** are listed with bullets. Enter each one followed by the Enter (Return) key. (Bullets are entered automatically on the description screen.)

**Pre-Requisites** are listed with bullets. Enter each one followed by the Enter (Return) key. (Bullets are entered automatically on the description screen.) Enter "None" rather than leave the list blank.

Enter a complete **Description** of the workshop to help users understand what to expect. The description will appear at the top of the page where users register for the workshop. Simple formatting is available in the field:

<b>These tags make the text between them bold.</b>  
<i>These tags make the text between them italics (slanted).</i>  
Leave a blank line (press Enter key twice) to separate paragraphs.

## ***Section Defaults***

The values entered in these fields will be the default values for a new Workshop Section. see [Add/Edit Workshop Section](#) for descriptions of these fields, page 9

## **Add/Edit Workshop Section**

**HINT:** You can move to the next field on the screen by pressing the Tab key.

From the Workshop Sections screen, click the **Add Workshop Section** link to create a new section of the workshop; or click the **edit** link beside an existing Workshop Section to modify it.

To keep the Workshop Section in the database, but remove it from the Sign-Up page so no more users can register, turn on the **Inactive** option. Any scheduled automatic emails to registrants yet to be delivered **will not be sent**. Likewise, there is **no automatic notification to registrants** indicating the removal of the Workshop Section.

In the My Workshops listing, Participants will see all existing sections they have registered to attend (active or inactive). In other lists of Workshop Sections, Inactive sections are not listed unless the Show Inactive option is turned on.

**WARNING!** If you cancel a Workshop Section you can turn on the Inactive option to remove it from the registration page and prevent anyone from signing up. You should notify already registered participants that the workshop has been canceled. A link to email all registrants is located on the Roster page for the Workshop Section.

Enter a **Section Code** for the instance of the workshop that is unique for that workshop; that is, two sections of the same workshop cannot have the same Code.

**HINT:** You can enter a number representing the number of times the workshop has been presented (starting with 1 and continuing, of course) or the date of the workshop (such as 801 for an August 1 workshop). You might add text to indicate the day of the week: m t w h f s u, so 801f when August 1 is on a Friday.

Select a **Leader** (instructor) for the Workshop Section. This list is created on the Edit Community screen. The default selection is the Workshop Administrator.

Enter a **Location** for the workshop that describes where the participants can find it. Maximum length is 50 characters. The default for this field for all Sections of this Workshop can be entered on the Edit Workshop screen.

Select the notifications to **Copy Email to Administrator when Registrant is Notified**: when each participant signs up (Registration), Drops, or is Promoted from the Wait List to an open seat. Participants always receive these notifications; select these options if you want to receive the emails as well.

Enter the number of participants for **Minimum Enrollment**, **Maximum Enrollment**, and **Maximum number on the Wait List**. The default values for these fields for all Sections of this Workshop can be entered on the Edit Workshop screen. These fields are masked to require 2-digit numbers, so enter a zero before single-digit numbers: 03, for example.

When the Wait List maximum is reached, no other users can register for the workshop. When a registered participant drops from the roster, the next person on the Wait List is promoted to the available seat and an automatic email is sent to them to confirm the Registration. Another user can sign up for the available spot on the Wait List.

Enter the **Date** for the meeting time of the Workshop Section as MMDDYY or select a date from the calendar by clicking on the icon below the Date field.

Enter the **Start Time** and **End Time** for the meeting time of the Workshop Section. The default values for these fields for all Sections of this Workshop can be entered on the Edit Workshop screen. These fields are masked to require 4 digits for the time: the first 2 for the hour, the last 2 for the minutes (for example, 0100 for 1 o'clock) followed by A for AM or P for PM.

Click the **Submit** button in the top right corner of the screen to save your changes.

### ***Edit Workshop Section screen***

The **Edit Workshop Section** screen includes everything on the Add Workshop Section screen plus the current number of participants Registered and Wait Listed, and controls to change or add Meeting Date and Times.

- To change the Meeting Time: click the **Delete** link beside the current Date and Time, then enter a new Date and Time and click the **Add** button.

A single Workshop Section can have multiple **Meeting Times**, that is, participants must attend multiple meetings for the complete presentation of the workshop. Enter an additional date and time, then click **Add**. Automatic reminder emails will be sent prior to each Meeting Time if the option is set for the Workshop.

#### NOTES:

- Alternate meeting times (participants can choose which meeting to come to) are set up as separate Workshop Sections.
- There is only one Status setting per participant for a workshop section. Attendance cannot be marked for each Meeting Time. Mark a participant's Status as Completed when he has attended all required meetings of a workshop section. see page 7

Click the **Submit** button in the top right corner of the screen to save your changes.

## Publicizing Your Workshop

When you schedule a workshop you should publicize it so that participants can register for it. The easiest way to do this is with an email message. A direct link to the Registration Screen for a workshop can be included in the email so recipients need only click the link to find it.

- To get this link, click on the View Registration Screen link on the Workshop Sections page, then copy the URL in the Address field of your browser and paste it as a link in the email announcement;
- or right-click the View Registration Screen link and select Copy Link Location or Copy Shortcut.

NOTE: This URL will always bring users to the current Registration Screen for the workshop which lists all scheduled upcoming Workshop Sections, so you can reuse an email announcement for sections of the same workshop that you schedule later.

You can also describe in an email or printed announcement how to find the workshop on the website [workshops.appstate.edu](http://workshops.appstate.edu) using the FIND A WORKSHOP filters. see page 4

HINT: One administrator has successfully emailed a workshop announcement by going to the Registration Screen for the workshop and copying everything from the workshop name to the Register button and pasting this into an email message. Because email clients vary it's not possible to give complete instructions for this process that will apply to everyone; you will have to do some experimenting on your own. Your message will need to be formatted as HTML or Rich Text as opposed to Plain Text to retain the formatting of the copied text and for links to work from the email message.

## User Registration

Users register for a workshop section from the Registration Screen for a workshop, which displays the full description of the workshop, optional information about the Workshop Administrator, and a list of currently scheduled workshop sections. If a workshop section has a seat open (the Max Enrolled have not registered), a **Register** button is displayed to the left of its listing. If the Max Enrolled have registered, but there are still spots on the Waiting List, a **Wait List** button is displayed. If the Max Wait List have signed up to be on the Waiting List, no button is displayed for the workshop section. A Workshop Administrator can also register a user from the Roster screen. see page 6

To register or sign up for the Waiting List, a user clicks on the button. If the user has not logged in, the Log In screen is displayed. After the user has successfully logged in, a confirmation screen is displayed with a summary of the workshop section, optional information about the Workshop Section Leader, and buttons to confirm the user wants to **Register** (or sign up for the **Wait List**) or to **Cancel** registering for this section.

To see a list of all workshop sections a user has registered for, the user must log into the website [workshops.appstate.edu](http://workshops.appstate.edu) (link in the top right corner of the screen), then select the **My Workshops** link (in the top right corner of the screen). If the workshop section has not yet occurred, a **Drop** button is displayed to the left of its listing. The user can drop his enrollment from the workshop section by clicking the **Drop** button, then confirming on the next screen. A Workshop Administrator can also drop a user's registration from the Roster screen. see page 6

The Status column for workshop sections listed is blank unless the Workshop Leader changed the user's Status from Not Set to Completed. This list of workshops only confirms the user's registration, not necessarily his attendance. Marking a participant's Status as Completed is the only way to indicate attendance in the Workshop Scheduler. see **Marking Attendance**, page 7

## Technical Support

For support on using the Workshop Scheduler, please submit a Support Request on line:

1. Go to <http://support.appstate.edu/help>
2. Log in with your ASU User ID and Password
3. Under Submit New Incidents: **Click to Submit a New Incident**
4. For Incident Type select **7. Software Training**
5. Complete the remaining fields; select **Workshop Scheduler Application** for the Training field