

# Learning Administrator's Quick Guide

## Creating a booking schedule and adding timeslots

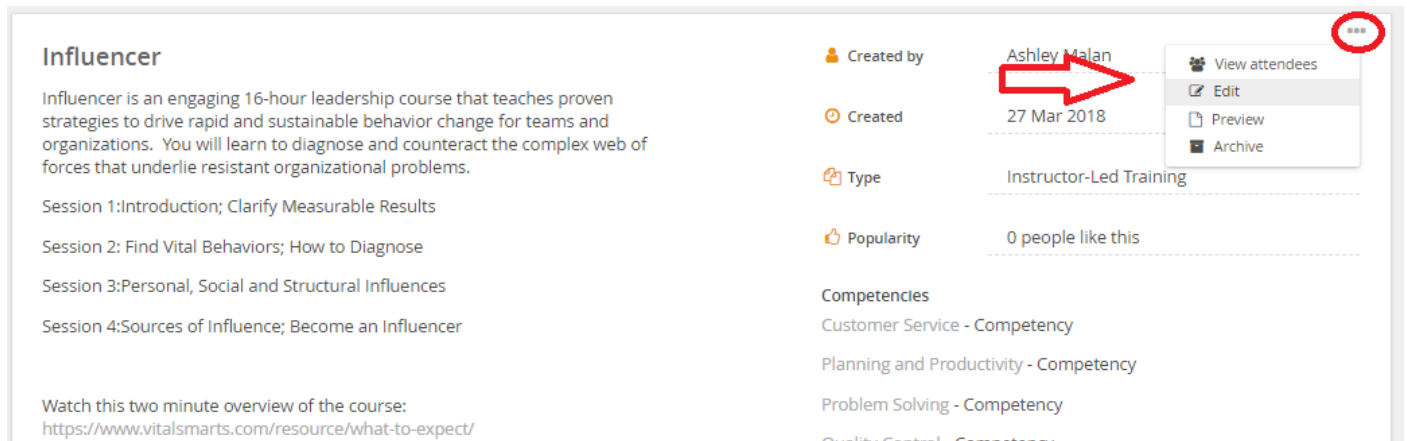
### Steps

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## 1. Edit the activity

Find the activity you'd like to add a timeslot for. From the three dots menu select 'edit'



The screenshot shows the 'Influencer' activity page. On the right side, there is a metadata section with the following details:

- Created by:** Ashley Malan (indicated by a red arrow)
- Created:** 27 Mar 2018
- Type:** Instructor-Led Training
- Popularity:** 0 people like this

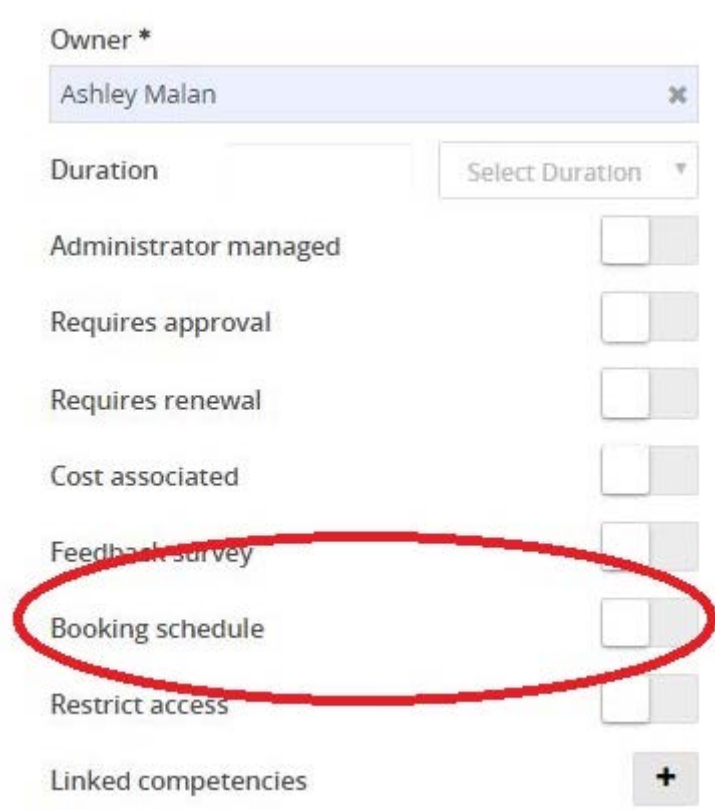
Below this is a 'Competencies' section listing: Customer Service - Competency, Planning and Productivity - Competency, Problem Solving - Competency, and Quality Control - Competency.

On the far right, a three-dot menu is open, showing options: View attendees, Edit (highlighted with a red arrow), Preview, and Archive. The three-dot menu icon is circled in red.

The main content area on the left includes the title 'Influencer', a description, session details (Session 1-4), and a link to a two-minute overview video.

## 2. Turn on the booking schedule

If it is not already, toggle the booking schedule to the "on" position (green).



The screenshot shows the configuration settings for an activity. The 'Owner' is set to 'Ashley Malan'. There is a 'Duration' dropdown menu set to 'Select Duration'. Below are several toggle switches:

- Administrator managed: Off
- Requires approval: Off
- Requires renewal: Off
- Cost associated: Off
- Feedback survey: Off
- Booking schedule: Off** (This row is circled in red)
- Restrict access: Off
- Linked competencies: +

### 3. Create a new booking schedule

If the only option is the plus sign (show below) that means you will need to create a booking schedule for the activity. If you created a booking schedule for this activity in the past you will see a pencil icon which will allow you to 'edit' an existing booking schedule.

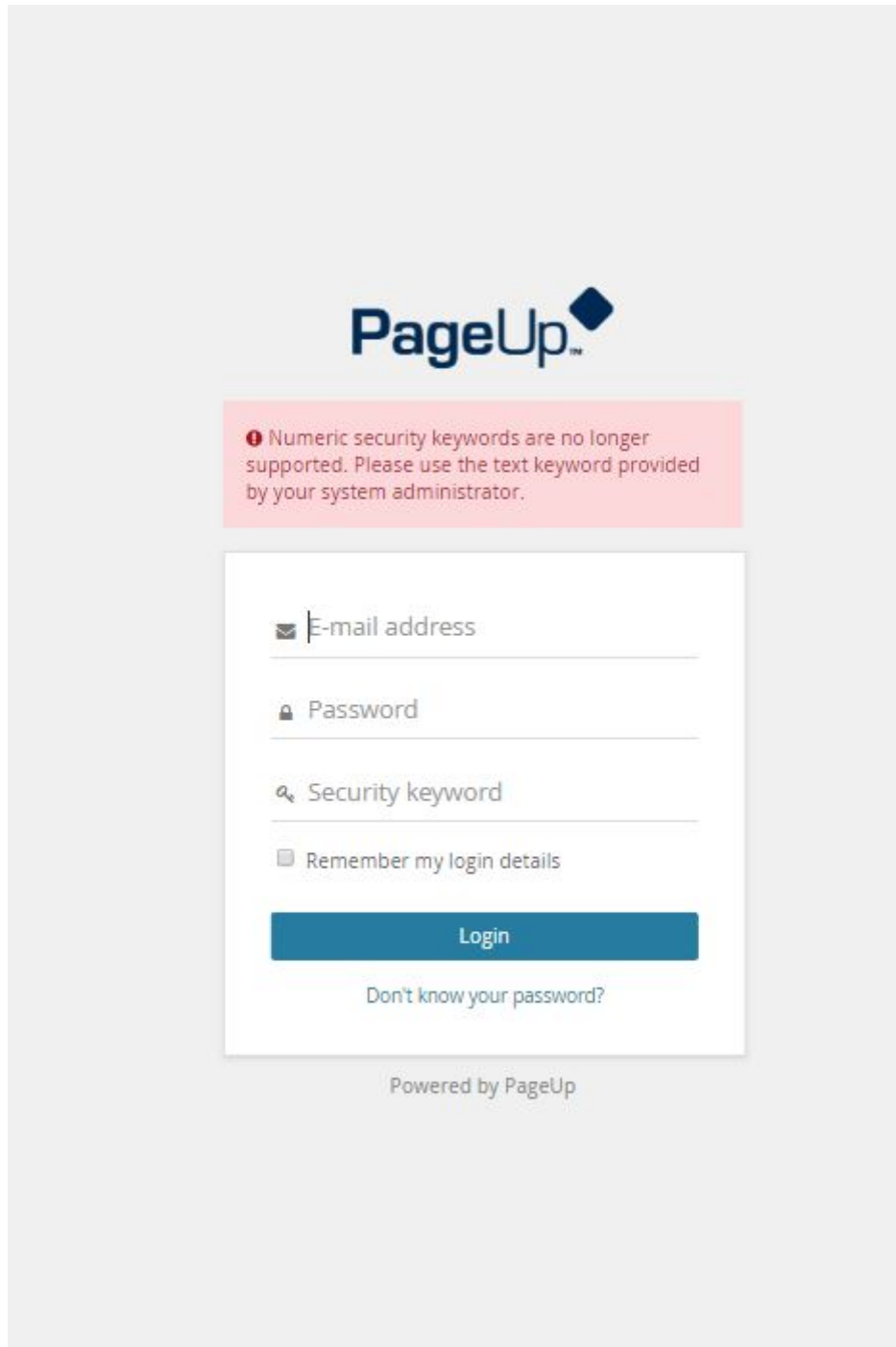
The image shows a configuration form for an activity. The fields and options are as follows:

- Owner \***: Ashley Malan (with a close 'x' icon)
- Duration**: [Empty input field] and [Select Duration ▼]
- Administrator managed**:
- Requires approval**:
- Requires renewal**:
- Cost associated**:
- Feedback survey**:
- Booking schedule**:
- Select an event**: [Dropdown menu] [Refresh icon] [Plus sign icon]
- Notify owner when new registrations are received
- Notify owner when registrations are cancelled
- Restrict access**:

A red circle highlights the plus sign icon and the 'Add' button that appears below it.

If you need to create a booking schedule from scratch continue on, if you need to edit an existing booking schedule and add timeslots skip ahead to step four.

If, after clicking on the plus sign, you are routed to the login page shown below, close that tab in your browser and click on the plus sign again.



The image shows a login page for PageUp. At the top center is the PageUp logo, which consists of the text "PageUp" followed by a blue diamond shape. Below the logo is a red rectangular box containing a warning icon (a red circle with an exclamation mark) and the text: "Numeric security keywords are no longer supported. Please use the text keyword provided by your system administrator." Below this warning box is a white rectangular form with a light gray border. Inside the form, there are four input fields: the first is labeled "E-mail address" with an envelope icon; the second is labeled "Password" with a lock icon; the third is labeled "Security keyword" with a magnifying glass icon; and the fourth is a checkbox labeled "Remember my login details". Below the input fields is a blue rectangular button with the text "Login" in white. Underneath the button is a link that says "Don't know your password?". At the bottom center of the page, below the form, is the text "Powered by PageUp".

This should route you to the event details page (shown below). When adding a booking schedule make sure the title matches the title of the learning activity. Select 'learning' as the event type and look up the appropriate venue. You can add a contact name and public instructions but this is not necessary. Click 'save'.



If you cannot locate the venue you need, contact [learning@uoregon.edu](mailto:learning@uoregon.edu) to have it added.



Please fill in all mandatory fields marked with an asterisk (\*).

**Event details**

Title:\* **This should match the title of your Learning Activity**

Event type:\* Select **"Learning"**

Venue:\*     
No venue selected.

Owner:\*     
Name: Ashley Ashley Malan

Add owner as user?:  Yes  No

Contact name:

Public instructions:

Please save your event in order to enter timeslots



Why does the name of the title matter? (to skip the explanation go to step four)

Please fill in all mandatory fields marked with an asterisk (\*).



**Event details**


Title:\*

Event type:\*

Venue:\*   

[+ HR Training Room](#)

Owner:\*   

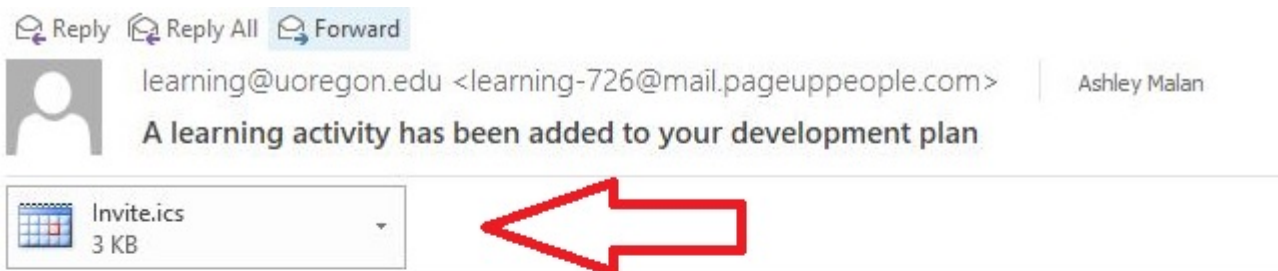
[Name: Ashley Ashley Malan](#) 

Add owner as user?:  Yes  No

Contact name:

Public instructions:

The Outlook invite that is sent when a user books into a timeslot references the title of the booking schedule, not the title of the learning activity.



Dear Ashley,

You have been booked to the following learning activity:

<b>Learning activity:</b>	Demo - OA Conference 10 a.m. Breakout Sessions
<b>Date:</b>	10 May 2018 10:00 AM - 11:30 AM
	Gumwood Room EMU, Room 245

The user will see the booking schedule title when they add the activity to their calendar and in any subsequent reminder messages sent from the calendar.

The screenshot shows an Outlook interface with a meeting invitation. The subject line is "Why Does this Matter?", which is circled in red. The sender is "noreply@pageuppeople.com" and the organizer is "Ashley Malan". The meeting is scheduled for Thursday, May 10, 2018, from 10:00 AM to 11:30 AM at EMU, Room 245 1395 University Street, Eugene, Oregon, United States, 97403. The calendar view shows the meeting starting at 10 AM. Below the calendar view, there is a note: "\*\*10 am Breakout Sessions\*\* This is a demo activity to show workshops can be listed in the system."

If you have notifications turned on to alert you when someone books or removes themselves from a learning activity the notification message you receive will reference the title of the booking schedule in the subject line.

Booked notification:

The screenshot shows an email notification with the subject line "Frank Zappa has booked into Why Does this Matter? on 10 May 2018 10:00 AM - 11:30 AM", which is circled in red. The sender is "learning@uoregon.edu" and the recipient is "Ashley Malan". The email includes "Action Items" and a greeting "Dear Ashley,".

Dear Ashley,

Frank Zappa has booked into the following learning activity:

**Learning activity:** Demo - OA Conference 10 a.m.  
Breakout Sessions

**Date:** 10 May 2018 10:00 AM - 11:30 AM

## Removed notification:

Reply Reply All Forward

learning@uoregon.edu <learning-726@mail.pageunnae.spe.com> Ashley Malan

Frank Zappa has cancelled their booking for Why Does this Matter? at HR Training Room on 2 Apr 2018 05:00 PM - 06:00 PM

Action Items

Dear Ashley,

Frank Zappa has cancelled their booking for the following learning activity:

**Learning activity:** Demo - OA Conference 10 a.m. Breakout Sessions

**Date:** 2 Apr 2018 05:00 PM - 06:00 PM

**Location:** HR Training Room  
PeaceHealth North Building, Room 478  
677 E. 12th Ave., 12th & Hilyard  
Eugene 97401

## 4. Add timeslots

After entering the title, type, venue and clicking 'save' the screen will refresh and allow you to add timeslots.

Name: Ashley Ashley Malan

Add owner as user?:  Yes  No

Contact name:

Public instructions:

Time slots

Add bulk timeslots:

Enter the date, start time, end time and positions, click 'add'. Repeat this process for as many timeslots as you need to add.



More than one venue? Update the venue for a particular timeslot using the magnifying glass next to the venue field. Remove the name of the venue that currently listed in the field and click on the magnifying glass. Using the search bar, locate the venue you need and click 'okay'. Then complete the additional fields for that timeslot before clicking 'add'. The newly added timeslot will appear in a list below the fields.

**Time slots**

Add bulk timeslots:

Or Add a single timeslot:

Venue:\*

[HR Training Room](#)

Event date:\*   Start time:\*  End time:\*  Users:  Positions:\*

Add a timeslot and now you can't find it? As you can see below, I added Swindells.

**Time slots**

Add bulk timeslots:

Or Add a single timeslot:

Venue:\*

[Swindells Room](#)

Event date:\*   Start time:\*  End time:\*  Users:  Positions:\*

To add attendees to, or remove attendees from learning events please use the employee services system.

Active	Event date	Start time	End time	Attendees	Positions	Venue	
<input checked="" type="checkbox"/>	4 May 2018	9:00am	11:30am	0	10	Coquille Room	<a href="#">Edit</a>   <a href="#">Remove</a>
<input checked="" type="checkbox"/>	10 May 2018	10:00am	11:30am	2	2	Crater Lake North	<a href="#">Edit</a>   <a href="#">Remove</a>

## Where is Swindells!?!?

**Time slots**

Add bulk timeslots:

Or Add a single timeslot:

Venue:\*

[+ HR Training Room](#)

Event date:\*   Start time:\*  End time:\*  Users: 0 Positions:\*

**i** To add attendees to, or remove attendees from learning events please use the employee services system.

Active	Event date	Start time	End time	Attendees	Positions	Venue		
<input checked="" type="checkbox"/>	4 May 2018	9:00am	11:30am	0	10	Coquille Room	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
<input checked="" type="checkbox"/>	10 May 2018	10:00am	11:30am	2	2	Crater Lake North	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>

In order to see all timeslots you will need to use the scroll bar

**Time slots**

Add bulk timeslots:

Or Add a single timeslot:


Venue:\*

[+ HR Training Room](#)

Event date:\*   Start time:\*  End time:\*  Users: 0 Positions:\*

**i** To add attendees to, or remove attendees from learning events please use the employee services system.

Active	Event date	Start time	End time	Attendees	Positions	Venue		
<input checked="" type="checkbox"/>	4 May 2018	9:00am	11:30am	0	10	Coquille Room	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
<input checked="" type="checkbox"/>	10 May 2018	10:00am	11:30am	2	2	Crater Lake North	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>



**Time slots**

HR Training Room

[+ HR Training Room](#)

Event date:\*  Start time:\*  End time:\*  Users: 0 Positions:\*

**To add attendees to, or remove attendees from learning events please use the employee services system.**

Active	Event date	Start time	End time	Attendees	Positions	Venue	
<input checked="" type="checkbox"/>	4 May 2018	9:00am	11:30am	0	10	Coquille Room	Edit   Remove
<input checked="" type="checkbox"/>	10 May 2018	10:00am	11:30am	2	2	Crater Lake North	Edit   Remove
<input checked="" type="checkbox"/>	13 May 2018	10:00am	11:30am	0	2	Swindells Room	Edit   Remove

Page 1 of 1 |   Records 1 to 3 of 3

## 5. Set a reminder message to send

You can set the system to send a default reminder message to those enrolled on a timer. The timed reminder will apply to all timeslots in the booking schedule. Two days before the event is the standard timing for a reminder message. Be sure to select the radio button for 'yes'. If you do not want the system to send the default reminder message leave the selection as 'No'.

<input checked="" type="checkbox"/>	10 May 2018	10:00am	11:30am	1	2	Crater Lake North	Edit   Remove
<input checked="" type="checkbox"/>	13 May 2018	10:00am	11:30am	0	2	Swindells Room	Edit   Remove

Remind users:  Days  before the event?:  Yes  No

**The following users have not yet been sent invitations:**

- 0 Users

**A calendar update email may be sent, in addition to any optional communications**

E-mail: Users:  Yes  No

The default reminder message looks like this:

Dear Ashley,

You are scheduled to attend the following event for 'Demo - OA Conference 10 a.m. Breakout Sessions':

**Date/time:** 2 Apr 2018 10:00 PM - 11:00 PM

**Venue:** HR Training Room

**Address:**

PeaceHealth North Building, Room 478

677 E. 12th Ave., 12th & Hilyard

Eugene 97401

Oregon United States

To view the course description use the link below.

<https://uomytrack.pageuppeople.com/learning/1613>

Sincerely,

**Learning and Development**

Human Resources

Email: [learning@uoregon.edu](mailto:learning@uoregon.edu)

Visit us online: <http://hr.uoregon.edu/professional-development>



## 6. Email users option

The dark blue bar that says “E-mail: Users” can be used to send a one-time message. Clicking ‘yes’ will produce a pop-up window which will allow you to customize a message using a text editor.

Typically it is easier to email attendees from the attendees list instead. This will generally be left as ‘no’ unless you are making changes to the booking schedule, such as cancelling an activity and wish to email those enrolled. Be sure to click “save” or “save and exit” before leaving the page

The following users have not yet been sent invitations:

- 0 Users

A calendar update email may be sent, in addition to any optional communications

E-mail: Users:  Yes  No

From:\*

Subject:\*

**B** *I* U ~~S~~ Formats **A** *I*<sub>x</sub>

Dear {FIRSTNAME},

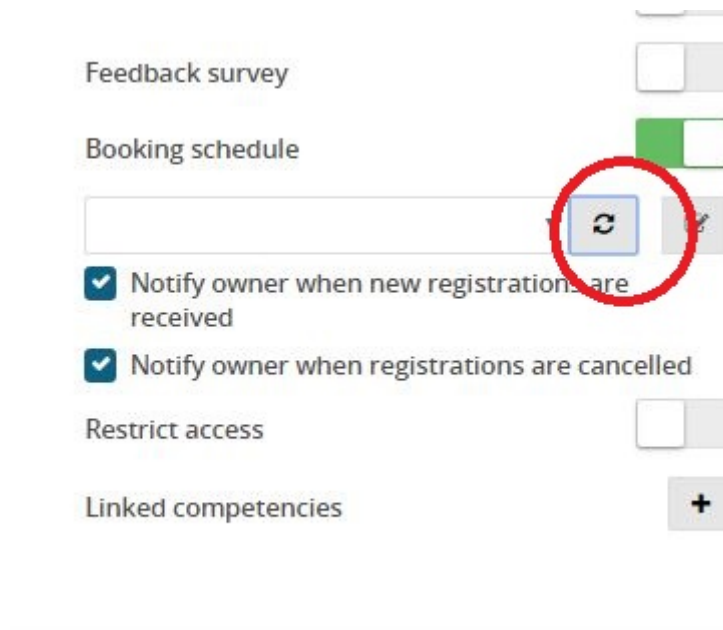
Kind Regards, UO Recruitment Team

Click or Drag & Drop files here  
Max 5MB in size

**Save** Save & exit Cancel Spell check

## 7. Assign the booking schedule

Return to the course edit screen and click the refresh button next to the booking schedule drop down menu.



Feedback survey

Booking schedule

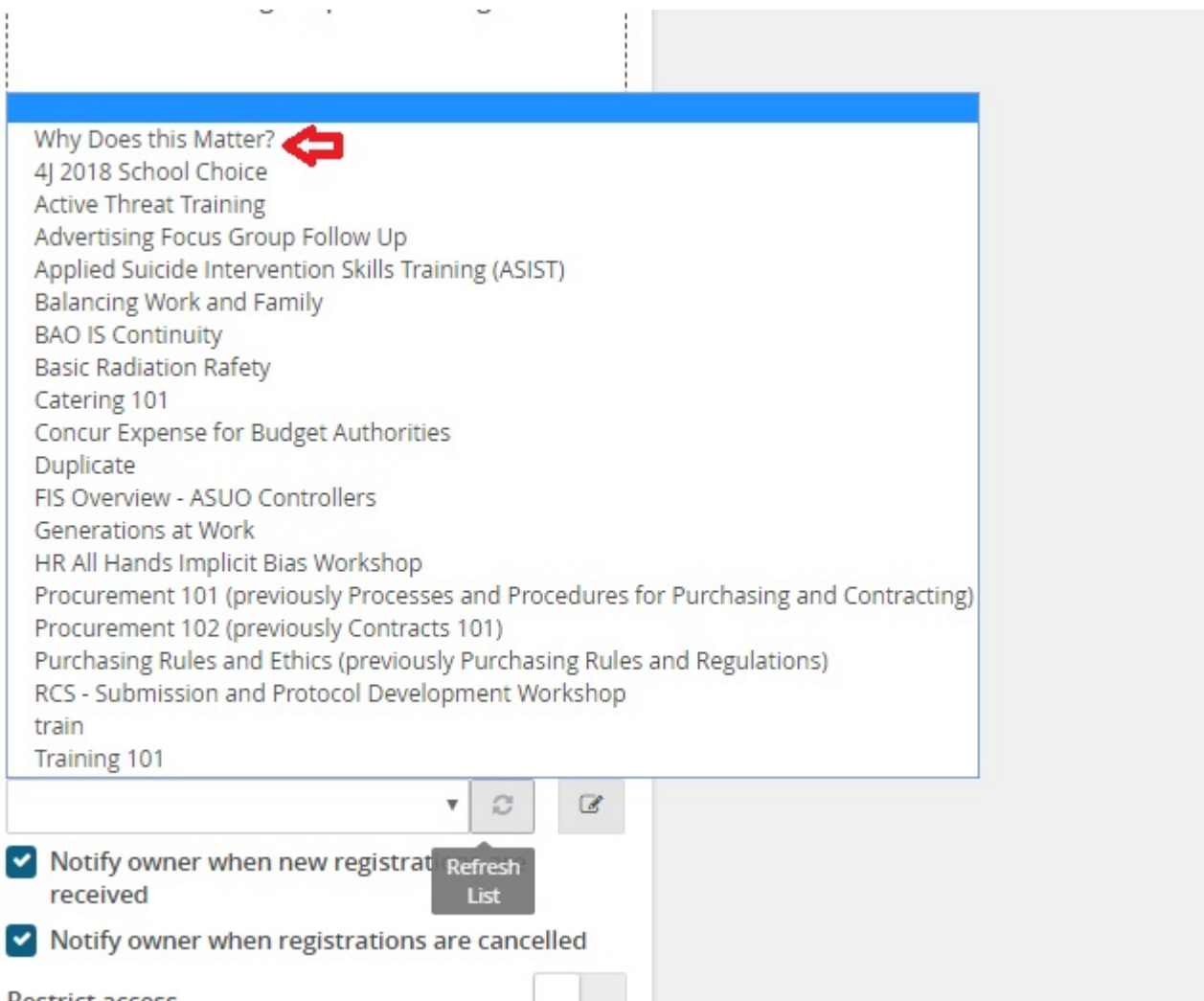
Notify owner when new registrations are received


Notify owner when registrations are cancelled

Restrict access

Linked competencies

Select the booking schedule for your activity from the list.



Why Does this Matter? 

4J 2018 School Choice

Active Threat Training

Advertising Focus Group Follow Up

Applied Suicide Intervention Skills Training (ASIST)

Balancing Work and Family

BAO IS Continuity

Basic Radiation Safety

Catering 101

Concur Expense for Budget Authorities

Duplicate

FIS Overview - ASUO Controllers

Generations at Work

HR All Hands Implicit Bias Workshop

Procurement 101 (previously Processes and Procedures for Purchasing and Contracting)

Procurement 102 (previously Contracts 101)

Purchasing Rules and Ethics (previously Purchasing Rules and Regulations)

RCS - Submission and Protocol Development Workshop

train

Training 101

Notify owner when new registrations are received

Notify owner when registrations are cancelled

Restrict access

**Sometimes there is a delay.** If your booking schedule is not listed on the drop down menu after refreshing the list please wait and look for it again later. It may help to exit out of the system entirely. If you create another booking schedule you will have duplicates in the system.

If you create duplicates you can contact [learning@uoregon.edu](mailto:learning@uoregon.edu) to have the removed.

Now that you have a booking schedule you will have the option to send booking and/or cancellation notifications. By default, these notifications are turned on. If you do not want the course owner to receive an email every time someone books and/or removes themselves from the course untick the boxes accordingly.

After selecting your booking schedule and notification preferences click submit.

The image shows a portion of a web form. On the left, there are several input fields: a text box, a dropdown menu, and two larger text areas. On the right, there are several settings:

- Feedback survey:
- Booking schedule:
- Why Does this Matter?:  with refresh and edit icons.
- Notify owner when new registrations are received
- Notify owner when registrations are cancelled
- Restrict access:
- Linked competencies:

At the bottom, there are two buttons: "Submit" and "Cancel". The "Submit" button is circled in red.



“Select timeslot” will now be listed as an option from the course description. If you do not see this option, check that your course is not archived. After clicking on ‘select timeslot’ all active dates/times from the booking schedule will be listed and available for booking by users.

**Demo: OA SLC 2019**  
Do you have anything to add before we change the activity to 'Booked'?

---

**Required Information** Please provide all required information listed in the learning activity description.

**Desired outcomes** What outcomes do you hope to achieve as a result of your planned action steps? Set a timeline for completion. Also consider how you will track ongoing progress, and by which measures you will assess your development.

**Supporting documents**

**Mandatory learning activity**

Local time (show in venue time)	Venue	Available positions
<input type="radio"/> <b>04 May 2018</b> 9:00 AM - 11:30 AM (-07:00)	<b>Coquille Room</b> EMU, Room 104 1395 University Street, Eugene, Oregon, United States, 97403	<span style="border: 1px solid orange; border-radius: 50%; padding: 2px 5px;">10</span>
<input type="radio"/> <b>10 May 2018</b> 10:00 AM - 11:30 AM (-07:00)	<b>Crater Lake North</b> EMU, Room 146 1395 University Street, Eugene, Oregon, United States, 97403	<span style="border: 1px solid orange; border-radius: 50%; padding: 2px 5px;">1</span>
<input type="radio"/> <b>13 May 2018</b> 10:00 AM - 11:30 AM (-07:00)	<b>Swindells Room</b> EMU, Room 230 1395 University Street, Eugene, Oregon, United States, 97403	<span style="border: 1px solid orange; border-radius: 50%; padding: 2px 5px;">2</span>