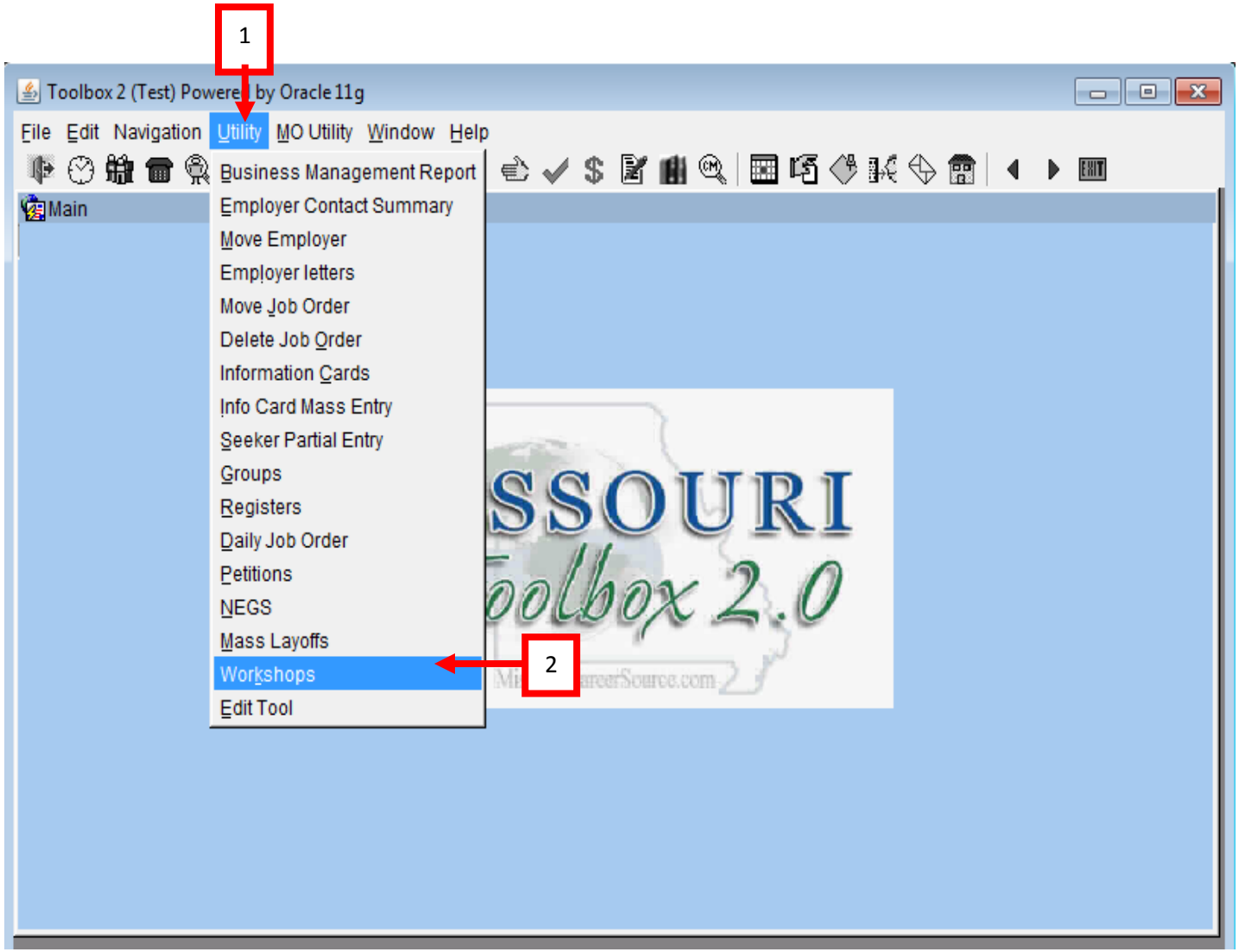
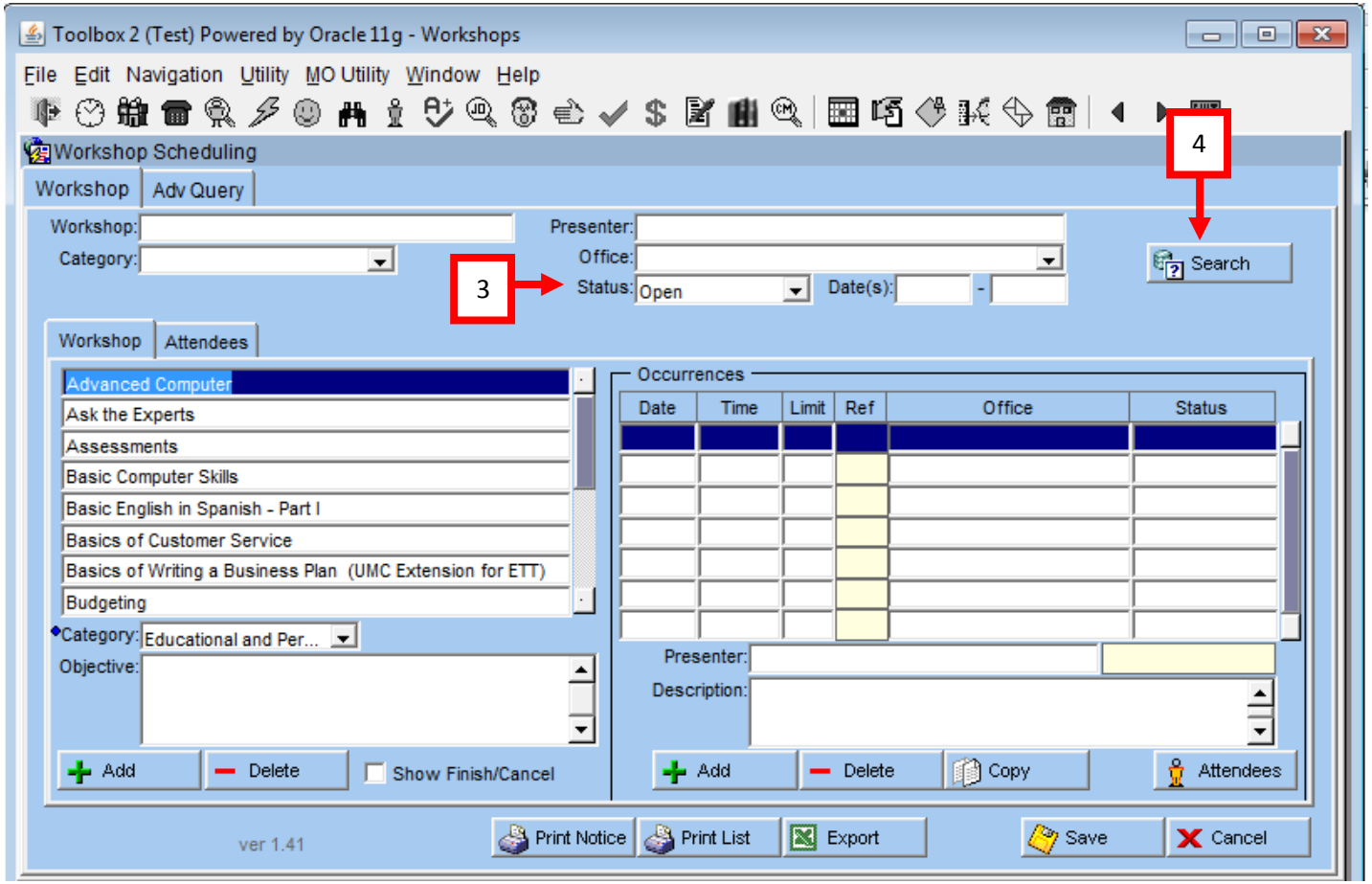
Creating an Occurrence of a Workshop

1. Click **Utility** menu.
2. Choose **Workshops** from the menu.



3. Using drop down arrow change **Status** field from open to blank. This will allow you to see all available workshops.

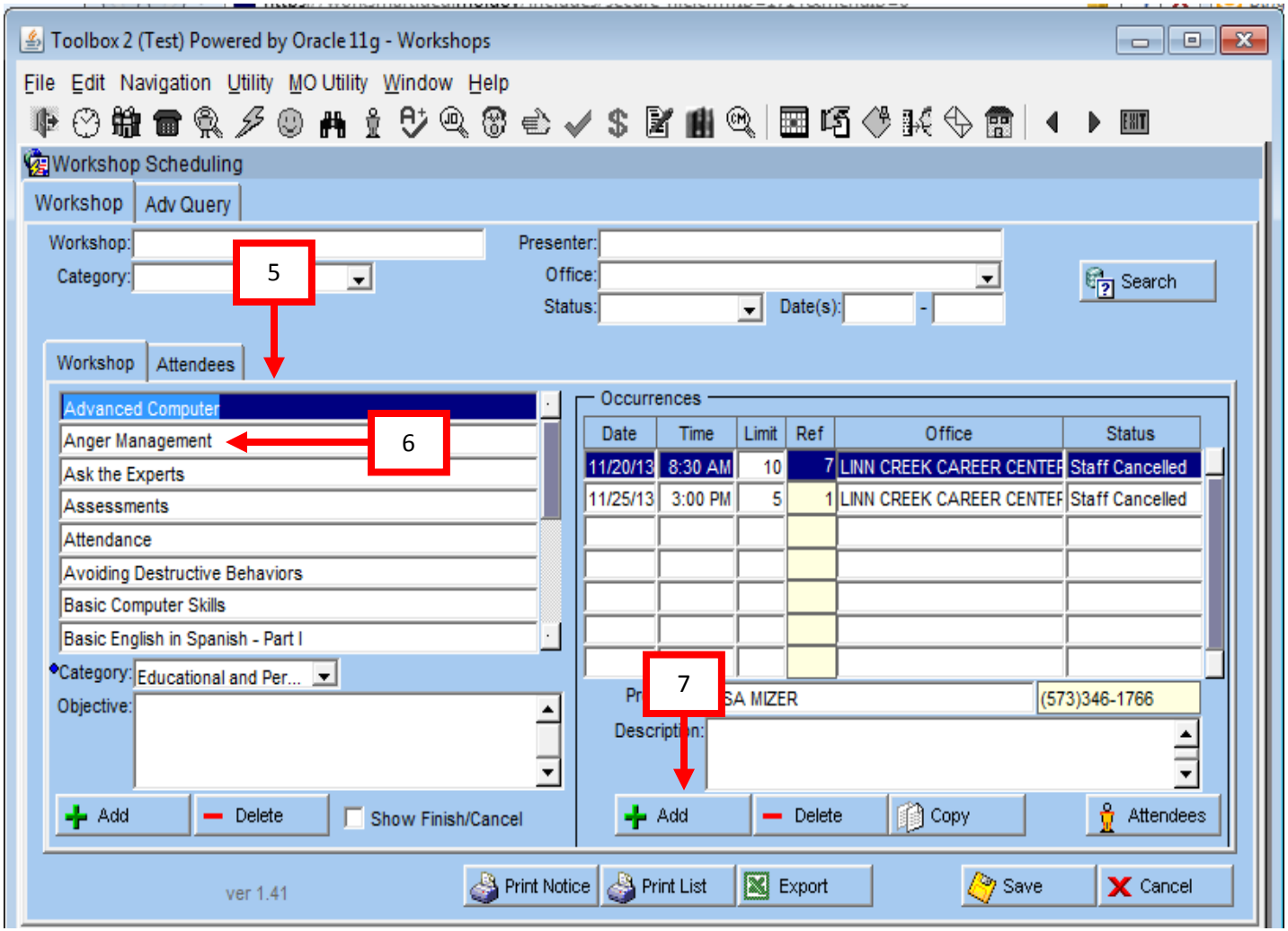
4. Click **Search** button



5. Notice the list of available workshops has changed.

6. Click on the **Workshop Title** you wish to create an occurrence for.

7. Click the **Add** button located under **Occurrences.**



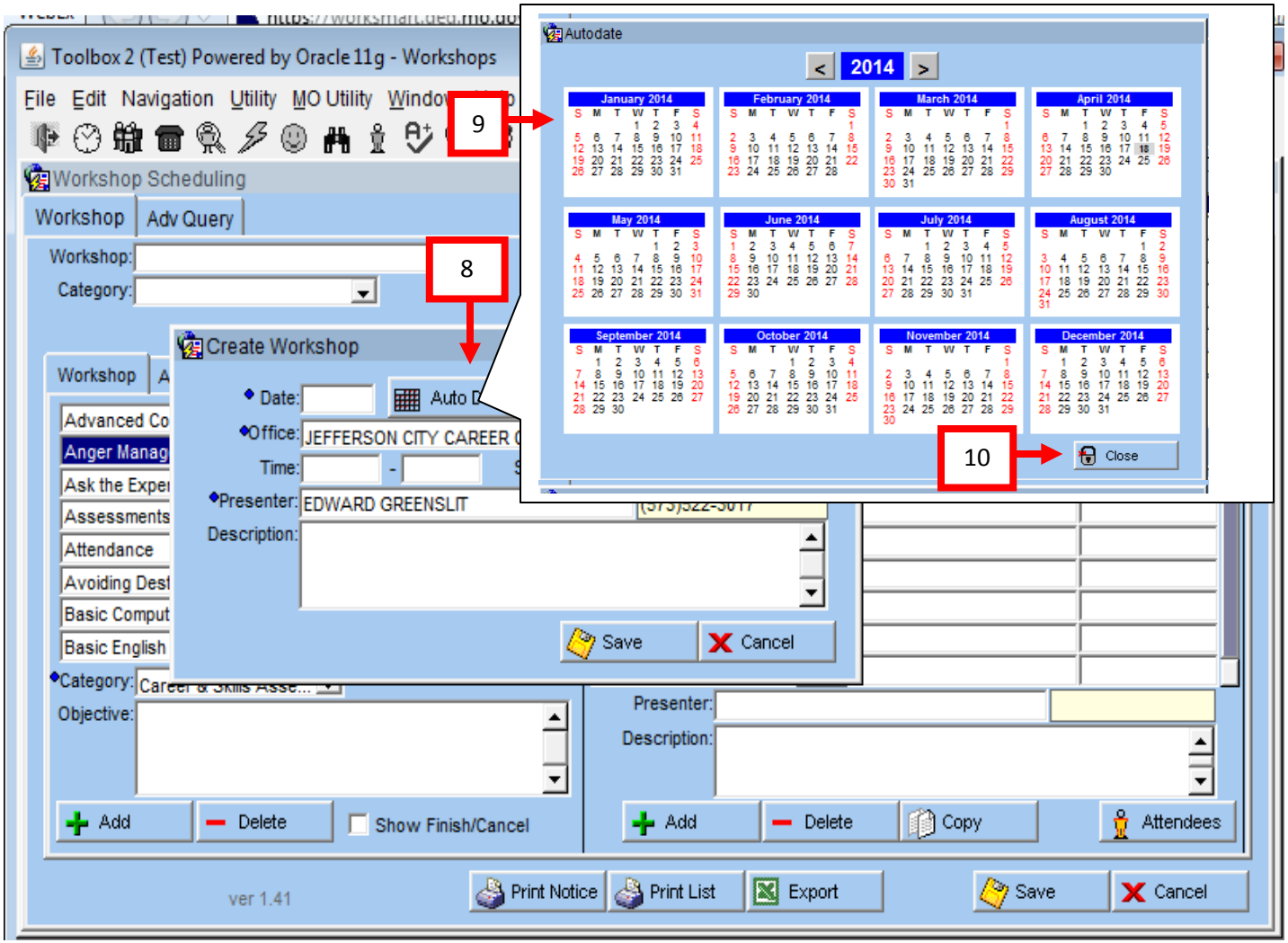
8. **Date-**You have two options here:

   a. Type in the date of the workshop in the free form field.

   b. Select the **Auto Date** button to select a date or dates. Auto Date is useful if you have a reoccurring schedule for the workshop you are entering. (We will use auto date in this desk aid)

9. Choose the dates on the calendar that the workshop will be held.

10. Click **Close** button

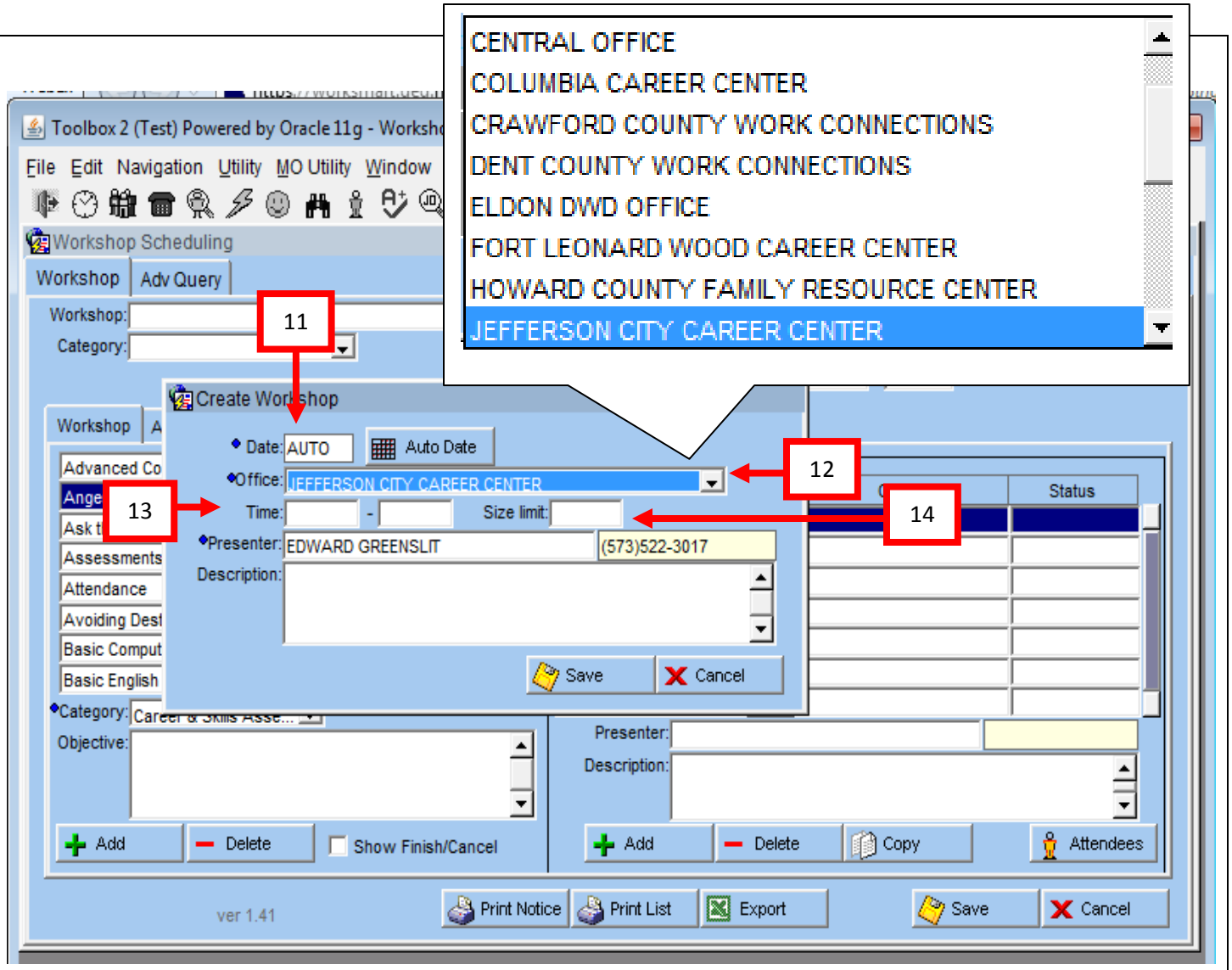


11. **Date** field is now populated with the word “Auto”

12. **Office**-Using the drop down arrow choose the office you are creating the occurrence for. Default is the office you are logged into. All offices in the region you work in will be displayed in the drop down.

13. **Time**-Enter the beginning and end time for the workshop. Any time after 5 PM must be entered in military time (24 hour clock)

14. **Size Limit**-Enter maximum number of participants for the workshop.

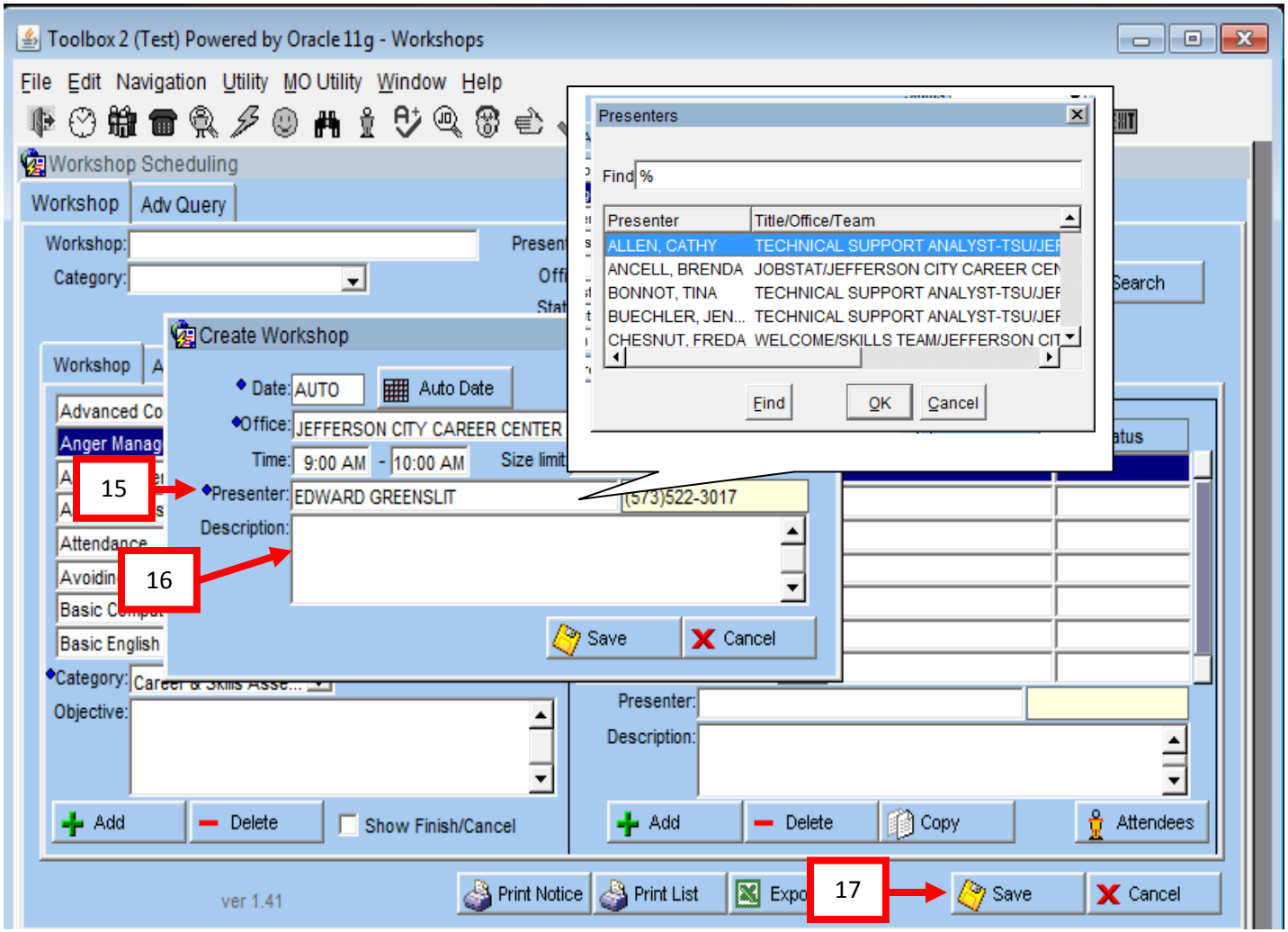


NOTE: Please do not create workshop occurrences in offices you are not responsible for.

15. **Presenter**-Default presenter is you. By double-clicking in the field you can bring up a list of other staff with **Presenter** access assigned to your office.

16. **Description**-If necessary enter a description of what the workshop will cover.

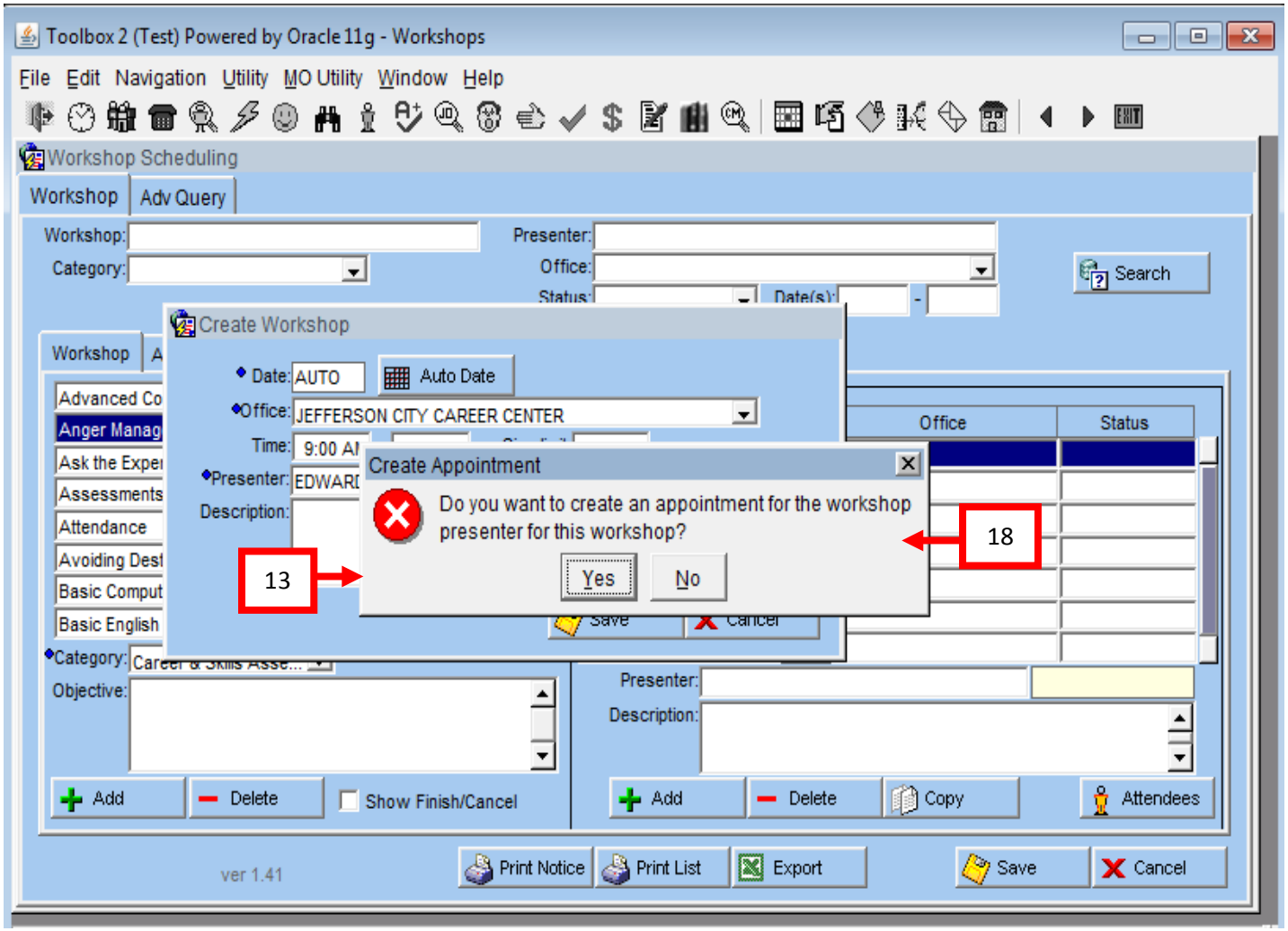
17. Click **Save** button

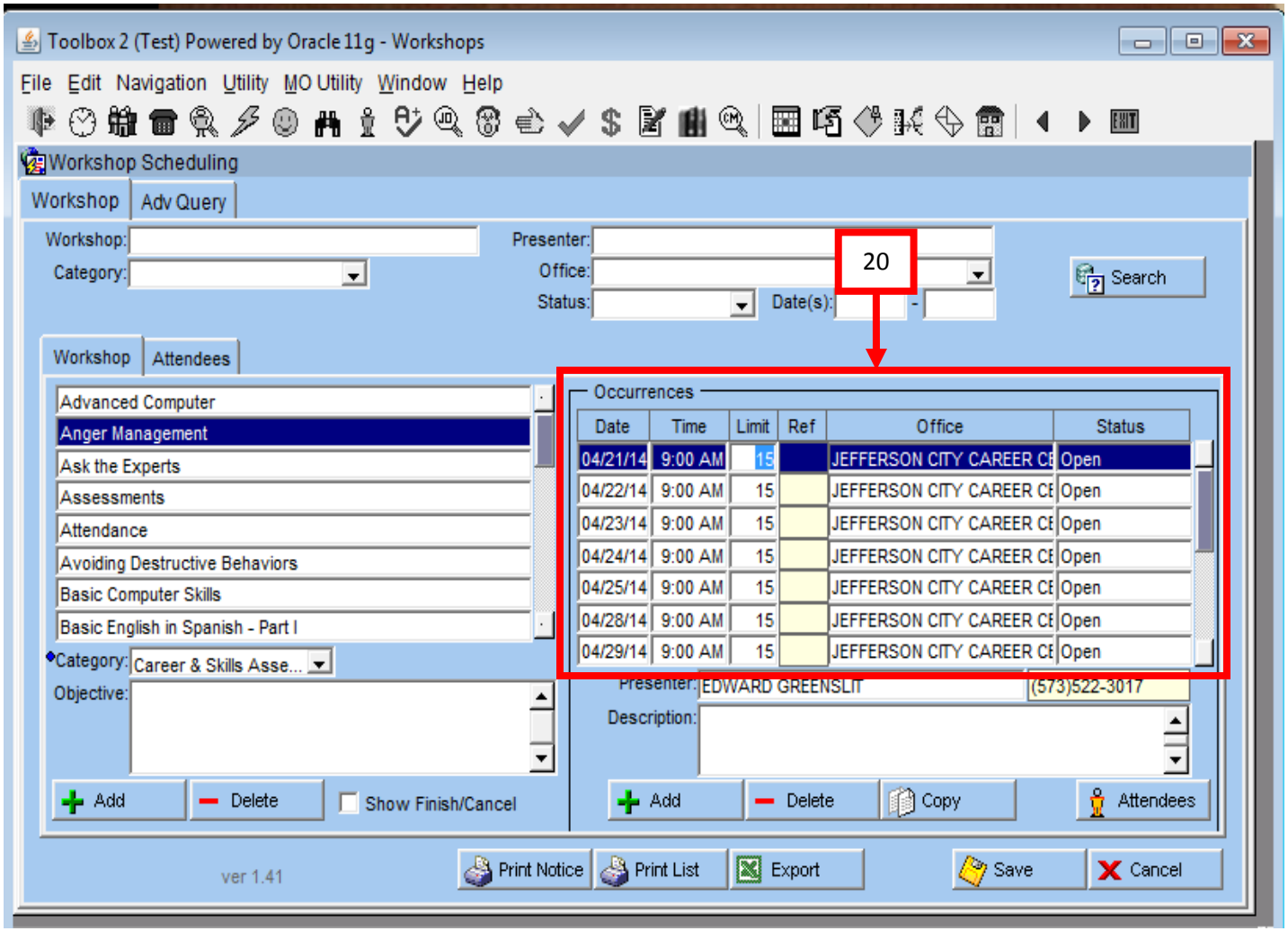


NOTE: Please do not make someone a presenter for a workshop that you are not responsible for.

18. **Create Appointment**- Select **"Yes"** or **"No"** to this popup. Yes will place an appointment on the presenter **Scheduler** to remind them of the workshop. No will not create the appointment.

19.



20. Occurrences you created are now displayed in the **Occurrences** area of the **Workshop Scheduling** module.

This completes the creation of Workshop Occurrences.