Setting and Reviewing a Workshop

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Workshops are accessed through Other Admin Activities, WorkshopsÂ on the menu toolbar. Here a CSO admin may view all Current (Current tab), Past (Past tab), and Matched (Matched tab)Â workshops. An admin may also add a new workshop, as well as, make individual workshops visible or not visible to candidates. Â In addition to making individual workshops visible or not visible to candidates, an admin may use the buttonsÂ "Make Visible toÂ Candidates" and "Make NOT VisibleÂ to Candidates" found under the Next Actions drop down menu, to perform the specified task in mass to all of the workshops on the tab they are viewing. Â

On the main Workshop File page, an admin may perform a search for a specific workshop based on advisor, topic, or room, or the last date (range) a workshop was updated by an admin. The results of the search will display on the Matched tab. The following are step by step guides on adding, reviewing, and setting/editing details to a workshop.

Setting up Workshops From the Dashboard toolbar, click Other Admin Activities Click Workshops from the sub-menu From the Workshops page, click the Next Actions drop down menu, followed by the Add Workshop iconÂ From the Workshop Details page, add the appropriate information

Note: If the workshop asks for the maximum number of attendees, this information will pre-fill from the selected room record if that room has the maximum number of attendees answered. Click Save **Reviewing Workshop Candidate/Student Signups** From the Dashboard toolbar, click Other Admin Activities Click Workshops from the sub-menu Search for and find the Workshop record you'd like to review. Â To review signups, click the Student Signups tab from the Workshop Details To add candidates, click the Add Students icon From the Select Candidate page, select the candidate from the list, or utilize the candidate name search field. You may set additional criteria based on Class Year and Program eligibility for the Workshop. Â Click Add to Workshop next to the candidate's name You may also review the eligibility of the candidate as it relates to the given Workshop. Â **Marking Students/Candidates As Attended/Not Attended** From the Workshop Details Page, navigate to the Student Signups tabÂ Â To mark that candidate as attended the workshop, click the Attended (calendar) icon. You may click the icon again to mark the student as Unattended, if needed. Â Important to note that there is a setting that can change the default state from Attended or Unattended The Check-In utility will automatically mark students as attended when they check into a Workshop. Contact GradLeaders Support at support@gradleaders.comÂ or your CRM if interested in this utility. Â **Emailing Students/Candidates Attending a Workshop** To email an individual candidate, click the Email (envelope) icon next to their name in the Student Signups Tab Additionally, there arre options under the Action menu to Email All, Email Attended Students, Email Not Attended Students, or Email All Students within a set Class Year that are not signed up for the workshopÂ **Adding aÂ recurringÂ workshopÂ**

From the Workshops Details, click 'Copy' under the 'Action' menu On the Schedule Copy Modal, select one of the following: Copy once to new date Use this option to copy the appointment only once to the specified date Recur every weekday for X weekday(s) Use this option to copy the appointment to every day of the week for the specified number of weekdays This can be used to copy an appointment up to 260 times. Â Recur every week for X week(s) Use this option to copy appointment to once a week for the specified number of weeks This can be used to copy the appointment to the next 52 weeks Recur day X of every month for X month(s) Use this option to copy the appointment to a specific date in a month for the specified number of months This can be used to create an appointment from the 1st to 31st of a month for up to 12 months