Scheduling Tool

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The scheduling tool lets instructors and administrators easily offer in-person sessions such as: instructor led training, classroom courses, face-toface instruction, and blended learning. Multiple sessions can be created from one product without making a copy of the product.

.Here are some of the benefits of the scheduling tool:

- Create one product with multiple sessions
- Define the number of seats for each session
- Associate multiple dates to one product
- Define the session duration
- Offer each session in a different location
- Allow for a different instructor for each session
- Offer attachments for learners to download prior to the session
- Instructors may manually enroll learners on the fly
- Learners may register to a session through the course catalog

The scheduling tool is available for registrations through the course catalog. Access codes cannot be used to register users to a session.

View Scheduled Sessions

This feature is available to Site Managers, Campus Admins, Publishers, and Instructors depending system on configuration.

To view sessions that you have scheduled, select **Scheduling Tool** tab at the top of the page.



Site Managers can view all sessions for a specific product. From main navigation, select Library, Products, and then select **Scheduling Tool** from the Options menu.



Site Managers can view all sessions in the LMS. Open a product and select **Scheduling Tool** from the Properties menu.



The sessions displayed by the Scheduling Tool page are determined by the user type accessing the page, as follows:

User Type	Visibility
Instructors and Publishers	Sessions that are within the user's groups and registrations. The user must be registered to a
	product in order to see its available sessions.
Campus Admins	Sessions that are within the user's campuses.
Site Managers	All sessions.

Print or Export Session List

Select an export option at the top of the page to save or print a copy of the list of sessions.



Session Filters and Saved Searches

- 1. Navigate to the Scheduling Tool.
- 2. Select the Filter tab.



3. Chose any of the available filters and then select the **Filter** button at the bottom.

Status Confirmed ×		×	Add Filters
Tip: Use ctrl+click to select multiples			Product
Elise Dechein	×		Name
Location Ottawa	×		Start Date
👔 Filter 🕑 Reset 📇 Save Search			🔘 Туре

You can access any filters that you saved via the Searches tab.

1. To save a filter, apply filters, and then select **Save Search** from the Filter page.



2. Give the search a unique name and description and then select **OK**. Select the name of the search to run the filter and see the results.



Create, Copy, or Edit a Session

You may create, copy, or edit one session at a time.

Create

- 1. Navigate to the Scheduling Tool.
- 2. Select Create from the Options menu.

Options
💽 Create 🚽
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- 3. Fill out the form (see form fields below).
- 4. **Create**. **Save and Create Another** will keep the data from the previous save.

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A copy keeps the attachments and settings of the original session. The status is set to "Planned" so that you can makes edits. Once you are ready to let users register to the session, set the status to Confirmed.

- 1. Navigate to the Scheduling Tool.
- 2. Select **Copy** from the split button next to the relevant session.

Edit	~	
😑 Delete		
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- 3. Find your copy at the end of the session list and then select **Edit** to make necessary updates to the session (e.g. date and location).
- 4. Save.

Edit

Select **Edit** next to the appropriate session on the Scheduling Tool page. All fields can be edited except for the Bundle and Product fields. Change the status to Confirmed before it will be available for registration. The LMS does not automatically notify users about edits. If necessary, you can generate an email list to notify enrolled users.

≣Li	st	Filter	Search	es				
Ð	ID 🔻	Name	Product	Start Date	Status	Туре	Location	Instructor
0	3	Tbay WHMIS Course	Hazardous Materials	1/28/2016 7:00 AM	Confirmed	Classroom	Thunder Bay Local 402	Dechein, Elise Edit v <edechein@sencia.ca></edechein@sencia.ca>

Form Field	Field Type	Required	Description
Name			
Name	Text Input	Yes	Enter a name for the session.
Description	Text Input	No	Optionally provide details and links that append an existing course description. Users
			will see the session description when they Click for Info in the catalog.
Bundle	Dropdown	No	Narrow the product list by selecting a category bundle.
Product	Dropdown	Yes	Select the product for your session.
Instructor	Dropdown	No	Select an instructor for the session.
Location	Text Input	No	Enter details about where the session is taking place.
Room	Text Input	No	Identify the room that the session is meeting in.
Status	Dropdown	Yes	Select the status of the session. A status change does not run any LMS tasks and is not
			automatically affected by publish dates; status is more of an administrative tool.
Confirmed:	Allows registra	ation from cata	log & calendar.
Cancelled:	5 1 11 1		
Planned:	Disables registration from catalog & calendar.		
Туре	Dropdown	Yes	The delivery method is shown in the catalog (e.g. Classroom, Webinar). The register
			button will change based on the type. The type and register buttons can be renamed by
			a Site Manager.
Maximum	Text Input	No	Enter the number of registrations available or leave blank for unlimited registrations.
Attendance			Once this number is reached, users attempting to register will see that the class is full. If
			a user drops from the session, it will open a registration to the session.
Start Date	Date/Time	Yes	Users cannot register after the start date/time regardless of publish date and status,
			however, Instructors can manually register a user past the start date. Please note that
			the LMS displays all times in Eastern Time Zone.
Published	Date/Time	No	Select one of the two options to set a time frame to accept registrations for confirmed
			sessions:
			 Publish Forever: This will open your session to registrations from the time you
			Create the product until the time you have changed the status to Completed.
			 Publish between: Set a specific date/time range to accept registrations from the catalog and calendar
Attachment	File Unload	No	Unload files such as ics indf and docy to make them available to enrolled users. To
Actachinent			prevent calendar conflicts, you can attach only one lics at a time.

Manage Session Attachments

Upload files such as .ics, .pdf, and .docx to make them available to enrolled users. One file can be attached during creation, however after creation, you can add multiple attachments from the Scheduling Tool page. LMS does not automatically notify users about attachment updates. If necessary, you can generate an email list to notify enrolled users.

Add Attachments

1. Select **Manage Attachments** from the session's **Edit** split button.



2. Choose to upload the file via http or via ftp (for large files).

Options	
Dpload	
🎉 Manage FTP	

Delete Attachments

1. Select Manage Attachments from the session's Edit split button.



2. Select the delete icon for each attachment that you want to remove.

File Name	Last Modified	Size	
training_session.ics	10/28/2015 12:38:17 PM	9 KB 😑	
user_guide.pdf	12/07/2015 12:58:16 PM	577 KB 😑	

Create an .ics File in Outlook

Calendar items can be created in Outlook and saved as an .ics file. You can then attach the file to a session, allowing users to add the session to their calendar.

- 1. Create calendar item in Outlook.
- 2. Choose File.
- 3. Save as iCalendar format/.ics file.
- 4. Save.

Multiple files can be attached, but a session will only accept one .ics file. An .ics file is overwritten if another is uploaded.

Manually Enroll Users to a Session

You can enroll users into your session if they have not enrolled through the course catalog. Manual enrollment takes into account the maximum number of registrations available and does not allow you to register users if the class is full.

1. Navigate to the Scheduling Tool page, then from the dropdown menu beside your session select Add Registration.



2. Use the filters to search for the users and then Search. The filters will only show users who are not registered to the product.

Campuses	T
User Groups	Select One 🔻
First Name	
Last Name	
Username	
Email Address	
Search	Back to List

- 3. Select the users you wish to enrol into the session and then select the **Register** button.
- 4. Email users. The LMS does not automatically notify users that are manually enrolled. You can generate an email list to notify newly enrolled users.

View Your Class List

You can generate a class list that includes all of the users that are registered into a session. The list can be opened in HTML or downloaded to Excel. You can print the list to confirm attendance in a classroom setting or use the Excel file to import completions to the LMS.

1. Select **Class List** from the session's **Edit** split button.



2. Select HTML or Excel.

Email Your Class

The LMS does not notify users about changes, but you can generate a list of email addresses for registered users to notify them about changes.

1. Select **Email List** from the session's **Edit** split button.



2. Open the list in your default email client or copy/paste the emails addresses provided.



Reschedule a Session

1. Navigate to the Scheduling Tool page and then select the session's Edit button.



- 2. Change the Start Date and time for your session and then Save.
- 3. Remember to update any file attachments, especially an ICS file, if applicable.
- 4. Use the Email List function to inform registered users of the rescheduled class if necessary.

Cancel a Session

1. Navigate to the Scheduling Tool page and then select **Edit** for the session.



2. Change the Status to Cancelled, and then Save.



- 3. Email your class to inform registered users of the cancellation.
- 4. Changing the session to Cancelled will remove it from the course calendar and registration dropdown, but does not remove a user's registration to the product.

Delete a Session

The delete option is available from the **Edit** split button on the Scheduling Tool page. You must confirm the deletion of the session before it is actually deleted. You can delete multiple sessions at once from the Options menu. The LMS does not automatically notify users about deletions. If necessary, you can generate an email list to notify enrolled users.

When a session is deleted:

- The session record is deleted from the system.
- Uploaded attachments are deleted.
- User registrations to the session are removed.
- Prevents ability to register to this session.
- Grades, completions, and certifications are unaffected.
- The product is no longer available user home pages.

Options	Edit
Create	O Delete
	Сору
C Expand All	Attachments
Select All	🖄 Email List
Delete Selected (1)	🏰 Class List

Since different user types may view the Scheduling Tool page, deletion rules are in place as follows:

User Type	Deletion Rights
Site Manager	Can delete any sessions.
Campus Admin	Can delete any displayed sessions since only sessions within their registered campuses are displayed.
Instructor	Can only delete the sessions they have created; cannot delete sessions created by other users.
Publisher	Cannot delete any sessions.

For versioning and retention, it is recommended that you change the session status to Completed or Cancelled instead of deleting.

Scheduling Tool Dictionary Labels

If you would like to change any of the button or navigation wording, here are the associated variable labels used with the Scheduling Tool. For more information on updating labels, see Languages and Dictionaries.

Label ID	Label Name	Default English Dictionary
3186	name_product_offering_plural	Product Offering
3187	name_product_offering	Product Offering
3188	product_offering_name	Name
3189	product_offering_start_date	Start Date
3190	product_offering_type	Туре
3191	product_offering_status	Status
3192	product_offering_location	Location
3193	product_offering_id	ID
3198	reports_select_product_for_offering	Select a product to view offerings.
3200	reports_no_product_offerings	No available product offerings
3201	product_offering_desc	Description
3202	product_offering_room	Room
3203	product_offering_enrollment_limit	Maximum Attendance
3204	product_offering_publish_date	Publish Date
3205	product_offering_publish_end_date	Publish End Date
3206	word_attachment	Attachment
3207	delete_product_offering_message	Are you sure you would like to delete the following Product Offering Records?
3208	product_offering_edited	Edited
3209	product_offering_created	Created
3210	product_offering_cdate	Create Date
3211	product_offering_edate	Edit Date
3212	product_offering_status_1	Cancelled
3213	product_offering_status_2	Completed
3214	product_offering_status_3	Confirmed
3215	product_offering_status_4	Planned
3216	product_offering_type_1	Classroom
3217	product_offering_type_2	Webinar/Teleconference
3218	product_offering_type_3	Live
3219	product offering missing product	You must choose a Product

Label ID	Label Name	Default English Dictionary
3220	product_offering_missing_product_offering_name	You must enter a name for the Product Offering
3221	product_offering_missing_product_offering_start_date	You must enter a start date
3222	product_offering_generating_file	 Generating File. Please Wait. <img< th=""></img<>
		id="loadingImg" src="/modules/include/js/thickbox/loading.gif" alt="Loading"
		/>
3223	product_offering_attach_file	Attach File
3225	product_offering_type_4	Blended
3226	tab_product_offering	Product Offering
3234	product_offering_upload_title	Add Attachment
3235	product_offering_upload_choice	Select method to add attachment
3236	product_offering_ftp_upload	Manage FTP
3237	product_offering_http_upload	HTTP Upload
3238	name_product_offering_media_list	Manage Attachments
3239	product_offering_filename	File Name
3240	product_offering_file_last_modified	Last Modified
3241	product_offering_file_size	Size
3242	product_offering_media_list_no_media	No media elements exist.
3243	product_offering_delete_media_confirm_title	Confirm Attachment Delete
3244	product_offering_delete_media_confirm	Once deleted, an attachment cannot be recovered. Are you sure you want to delete
		the following?
3245	command_manage_attachments	Manage Attachments
3247	word_publish_forever	Publish Forever
3248	word_publish_between	Publish Between
3249	word_published	Published
3266	disable_catalog_registration	Disable Catalog Registration
3269	command_add_to_calendar	Add to Calendar
3270	command_click_for_info	Click for Info
3271	command_click_for_attachments	Click for Attachments
3272	command_drop	Drop
3273	product_offering_email_list	Email List
3274	product_offering_email_list_empty	No registered Users at this time
3275	command_email_list	Email List
3276	command_class_list	Class List
3277	name_html	HTML

Label ID	Label Name	Default English Dictionary
3278	name_excel	Excel
3279	product_offering_email_list_choice	Select file type of choice
3280	product_offering_class_list	Class List
3282	product_offering_num_enrollments	Number of Enrollments
3284	class_list_header_lname	Last Name
3285	class_list_header_fname	First Name
3286	class_list_header_username	Username
3287	class_list_header_attended	Attended
3288	class_list_header_other	Other
3289	class_list_header_integration_username	Integration Username
3322	word_attachments	Attachments
3324	confirm_drop	Confirm Drop
3325	product_offering_email_list_instructions	Select the text below to copy/paste the email addresses provided.
3326	word_generated	Generated
3327	product_offering_class_list_title	Attendance Sheet
3328	product_offering_mailto_text	Click to open email in default email client
3329	command_add_registration	Add Registration
3347	course_catalog_no_bundle_name	Miscellaneous
3348	command_register	Register
3349	add_registration_instructions	Click Search to get list of unregistered Users
3350	add_registration_none_found	No Users were found
3352	product_offering_choose_offering	Choose Product Offering
3353	product_offering_type_1_register	Schedule Now
3354	product_offering_type_2_register	Register Now
3355	product_offering_type_3_register	Schedule Now
3356	product_offering_type_4_register	Register Now
3357	course_catalog_status_not_registered	Not Registered
3358	course_catalog_registration_completion_status	Completion Status
3359	course_catalog_completion_complete	Complete
3360	course_catalog_completion_incomplete	Incomplete
3374	course_catalog_you_have_registered_for	You have registered for
3375	course_catalog_approval_pending	Approval is pending
3407	confirm_registration_title	Confirm Registration
3408	confirm_registration_content	Are you sure you would like to register these ([[entity_count]]) Users?

Label ID	Label Name	Default English Dictionary
3409	registration_success_title	Registration Successful
3410	registration_success_content	Users registered successfully
3411	course_catalog_no_items	No course catalog items available.
3417	course_catalog_switch_view	Switch View
3418	product_offering_maximum_enrollment_reached	Maximum enrollment reached.
3419	product_offering_too_many_users_title	Alert - Too many users selected
3420	product_offering_too_many_users_text	Operation cannot be completed. Maximum enrollments left
3421	product_offering_enrollments_left	Enrollments Left
3422	product_offering_warning_enrollment_limit_reached	The Product Offering has reached the maximum enrollment limit of
3424	product_offering_entity_type_4	Instructor
3425	product_offering_enrollment_limit_invalid	Please enter a valid number for maximum attendance
3426	product_offering_add_registration_title	Add Registration
3427	course_catalog_calendar_course_info	Courses without scheduled dates are not visible on the calendar.
3428	product_offering_ics_warning	Only 1 ISC file is allowed. An *. ICS file upload will overwrite an existing ISC file.