

# Instructor

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## Instructor Introduction

This manual has been written as a guide for Informetica Instructors (entity\_4). Instructor accounts are typically used to manage instructor led content (ILT), classroom learning, and blended (asynchronous) training. Instructor capabilities include:

- Managing classroom training
- Creating class sessions
- Grading learners
- Managing enrolments
- Viewing learner results
- Pushing email alerts
- Running reports

### Permissions Covered in Different Manuals

- Navigation and general desktop experience can be found in the [Participant User Manual](#).
- Running reports can be found in the [Reports Manual](#).



This manual may reference features not configured for your system or features may be named differently due to site customizations. Informetica is under constant development and some differences between the live application and this manual may occur.

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# Tools for Nonscheduled Courses



This feature is available to Campus Admins, Instructors, Publishers, and User Group Managers depending on system configuration. These features require your system to have the Instructor Utilities menu enabled.

The Instructor Utilities menu contains instructor led tools used for content where the **Scheduling Tool** is not required to create course sessions.

## Navigate to the Utilities Menu

1. Log in with an account type mentioned above.
2. Select the name of a product from the product menu on the left side of your home page.
3. Scroll down to the **Utilities** menu.

Utilities ^
Course Results
Create User
Compile Products
Forum
Course Chat
Learner List
Scheduling Tool

The utilities menu may not have all options shown enabled.

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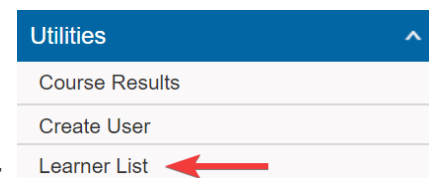
## Create and Enroll a New User

# Enrollment and Classroom Tools

The participant list is used to manage existing course enrolments and pending enrolments and offer some simple classroom tools. Select an item below that applies.

## Navigate to Participant List

1. Navigate to the [Utilities menu](#) .
2. Select the name of a product from the product menu on the left side of your home page.



3. Scroll down to the Utilities menu and then select **Participant List**.

### Approve or Decline Pending enrolments

Products configured to restrict enrolment will place all users attempting to enrol onto the product a pending status. In this case, you must approve each enrolment and may also drop a user's enrolment at any time. A user may also drop their own enrolment request prior to being approved.

1. Navigate to Utilities Participant List (see above).
2. The list of enrolled users will show a status of pending to indicate that enrolment has not yet been approved.
3. Select the check box in front of the names you wish to approve or decline.
4. Select **Approve** or **Decline** at the top of the list.

## Email enroled Users



If you are using the scheduling tool, you may want to Email Session Participants instead.

1. Navigate to Utilities Participant List (see above).
2. Select the check box in front of each name you want to email.
3. Select the **Email** icon at the top of the page to generate the email list.
4. Select **Click here to email**.

### Participant List

| User Group: -- Show All -- ▾ | Attendance Sheet | Name Tag | **Click here to email**

Completion Approval

<input type="checkbox"/>	User Name	User Groups	Status
<input type="checkbox"/>	Jennifer Cameron	<ul style="list-style-type: none"><li>• !</li><li>• !!!test</li><li>• !!test</li></ul> <a href="#">View All</a>	Approved
<input type="checkbox"/>	Êjason Êpaynter	<ul style="list-style-type: none"><li>• !!!General's</li><li>• AICCClassroomGroup</li><li>• test</li></ul> <a href="#">View All</a>	Approved
<input type="checkbox"/>	jasonTest19 jasonTest19	<ul style="list-style-type: none"><li>• Jason User Group</li><li>• test</li><li>• TestDesktopMngCreateUserGroup</li></ul>	Approved

## Mark Users as Complete



This feature is available to Instructors, depending on system configuration.  
Products must be configured with a completion rule to be marked as complete.

This tool lets you grant completion to users who do not yet have a finish date such as a user who has met completion requirements without completing the test. Completion approval often used for blended courses that have an offline element to them. For example, an Instructor running a course may require the participant to email their final project in for review before the completion of the course can be determined.

1. Navigate to Utilities Participant List (see above).
2. Select **Completion Approval** at the top of the page to generate a list of names for everyone registered to the product that needs to have their completion of the product manually approved.
3. Select the check box in front of each name you want to mark for completion.
4. Select **Approve Checked** at the top of the list. The completion approved field will read as either pending or approved, as applicable to the course configuration.



Name	Email	Completion Status
John Doe	john.doe@example.com	Pending
Jane Smith	jane.smith@example.com	Pending
Bob Johnson	bob.johnson@example.com	Pending

## Print Name Tags

1. Navigate to Utilities Participant List (see above).
2. Select **Name Tag** at the top of the page to generate a printable list of names for everyone registered to the product.
3. Select **Print** at the top of the name tag list to send the tags to your printer.

## Label Dimensions

- 8x10 paper size.
- 10 label per page, depending on your print settings (e.g. scale).

- Width: 125px(3.3cm), height 155px(4.1cm) per name tag.

## Print Attendance Sign-In Sheet



If you have the Scheduling tool enabled, you may wish to use the [Session Attendance Sheet](#) .

1. Navigate to Utilities Participant List (see above).
2. Select **Attendance Sheet** at the top of the page to generate a printable list of everyone enroled to the product.
3. Select **Print** at the top of the list to send the page to your printer.

## Participant List

User Group: -- Show All -- |  Attendance Sheet |  Name Tag | 

Completion Approval

Sign In Sheet Report - Informetica - Google Chrome

lms-demo.informetica.com/desktop/course/users/class\_list\_sign\_in\_sheet.asp

Print

**Attendee Sign-in Sheet** Generated on: 3/12/2013

Course: WHMIS Instructor: \_\_\_\_\_

Attendees: 47 Location: \_\_\_\_\_

Emp ID	Last Name	First Name	Location	Did you require a supply?	Is there a GL section?	Signature
mbennet@sencia.ca	Bennet	Maria				
jblunk@sencia.ca	Blunk	Julianne				
obree@sencia.ca	Bree	Christina				
sbrent@sencia.ca	Brent	Sebastian				
participant-jbruce@sencia.ca	Bruce	Jason				
kbun@sencia.ca	Bun	Kurt				
nburbridge@sencia.ca	Burbridge	Nelson				
jennifer@sencia.ca	Cameron	Jennifer				
jcarlson@sencia.ca	Carlson	Jeanine				
edechein@sencia.ca	Dechein	Elise				
demolearner	Doe	Alice				
jdoe@sencia.ca	Doe	Jane				
INFleamer	Doe	Trenton				
nesterline@sencia.ca	Esterline	Nita				
agaetano@sencia.ca	Gaetano	Alana				
dowaltnev@sencia.ca	Gwaltnev	Darryl				

## Edit Course Name Date or Status

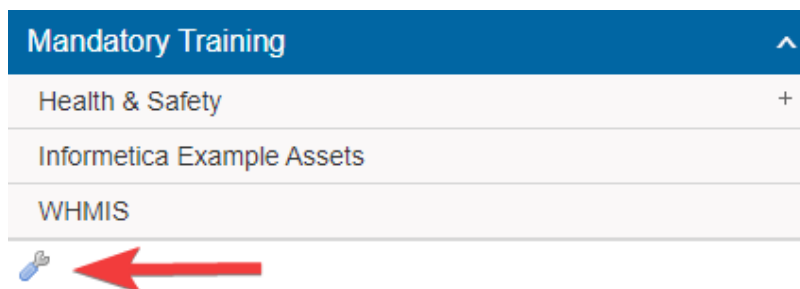


This feature is available to [Course Author](#) and [Instructor](#) accounts depending on system configuration.

## Edit Course Name or Date

1. Log in with an account type mentioned above.

2. Select the **wrench tool** from the product menu on the left side of your home page.



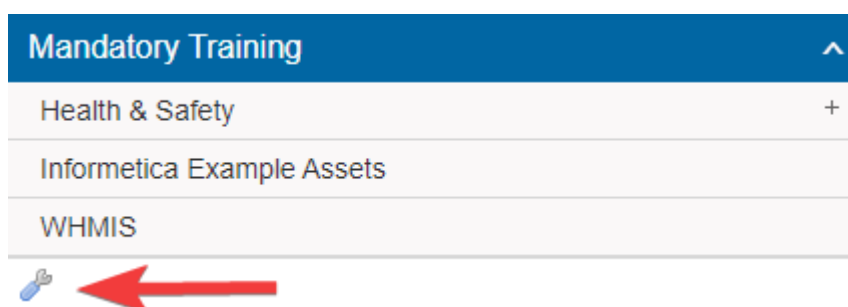
3. Select the name of a product to change title/menu titles and publishing dates.

A screenshot of the "Edit Details" form for a product. The form has a blue header bar with the text "Edit Details" and a close button (X). The form contains several input fields: "Menu Name" with the value "DR14 Confined Spaces", "Page Name" with the value "Confined Spaces", "Start Date" with the value "1/10/2020", and "End Date" with the value "1/23/2023". There is a checkbox labeled "Enable Time Range" which is checked. At the bottom of the form is a blue "Save" button.

4. **Save.**

## Change Course Status

1. Log in with an account type mentioned above.
2. Select the **wrench tool** from the product menu on the left side of your home page.



3. Select the box to the left of the course name.





# Navigate to Grading Tool

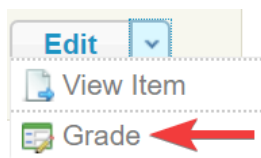
1. From your home page, open the desired product.

≡ Site Managers: select Library > Products.

2. Select the **Wrench** icon to view all assets in the product and then optionally use the filter to view only the modules.

≡ Site Managers: select **Modules** in the All Assets menu. If you cannot see the menu, show the [Tool Panel](#).

3. Select **Grade** from a module's **Edit split button**.



4. Optionally use [Filter and Save Searches](#) to locate specific individuals.

5. Optionally [Export](#) the page.

The image below shows the Grading Tool page.

Grading Tool

123Next >

Go to page:

Records per page: 25

Records: 67

Export As:

HTML

XLSX

CSV

English

Page Link

List

Filter

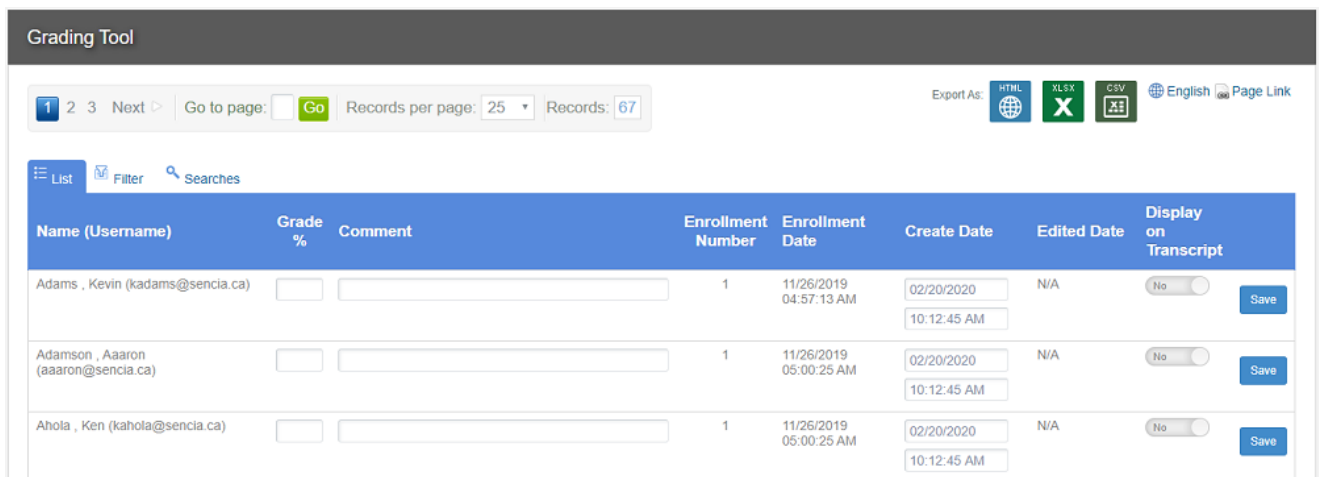
Searches

Name (Username)	Grade %	Comment	Enrollment Number	Enrollment Date	Create Date	Edited Date	Display on Transcript
Adams , Kevin (kadams@sencia.ca)	<input type="text"/>	<input type="text"/>	1	11/26/2019 04:57:13 AM	<div>02/20/202010:12:45 AM</div>	N/A	<div>No</div> <div>Save</div>
Adamson , Aaron (aaron@sencia.ca)	<input type="text"/>	<input type="text"/>	1	11/26/2019 05:00:25 AM	<div>02/20/202010:12:45 AM</div>	N/A	<div>No</div> <div>Save</div>
Ahola , Ken (kahola@sencia.ca)	<input type="text"/>	<input type="text"/>	1	11/26/2019 05:00:25 AM	<div>02/20/202010:12:45 AM</div>	N/A	<div>No</div> <div>Save</div>

# Grade Individuals

If you need to apply the same grade and date to several individuals at once, see [Set Grade Defaults](#).

1. Navigate to the [Grading Tool](#).
2. Enter the grade into the **Grade %** field for each individual. A valid entry is a number from 1-100.  
A passing grade must also be equal to or higher than completion rule applied to the module.  
Upon saving, the system will apply the current date and time (Eastern Time Zone).



The screenshot shows the 'Grading Tool' interface. At the top, there's a navigation bar with 'List', 'Filter', and 'Searches' options. Below this is a table with the following columns: Name (Username), Grade %, Comment, Enrollment Number, Enrollment Date, Create Date, Edited Date, and Display on Transcript. The table contains three rows of data for individuals: Adams, Kevin; Adamson, Aaron; and Ahola, Ken. Each row has input fields for Grade % and Comment, and buttons for 'Save'. The 'Create Date' and 'Edited Date' fields are pre-filled with dates and times. The 'Display on Transcript' column has a toggle switch set to 'No'.

Name (Username)	Grade %	Comment	Enrollment Number	Enrollment Date	Create Date	Edited Date	Display on Transcript
Adams , Kevin (kadams@sencia.ca)	<input type="text"/>	<input type="text"/>	1	11/26/2019 04:57:13 AM	02/20/2020 10:12:45 AM	N/A	<input type="checkbox"/> No <input type="button" value="Save"/>
Adamson , Aaron (aaron@sencia.ca)	<input type="text"/>	<input type="text"/>	1	11/26/2019 05:00:25 AM	02/20/2020 10:12:45 AM	N/A	<input type="checkbox"/> No <input type="button" value="Save"/>
Ahola , Ken (kahola@sencia.ca)	<input type="text"/>	<input type="text"/>	1	11/26/2019 05:00:25 AM	02/20/2020 10:12:45 AM	N/A	<input type="checkbox"/> No <input type="button" value="Save"/>

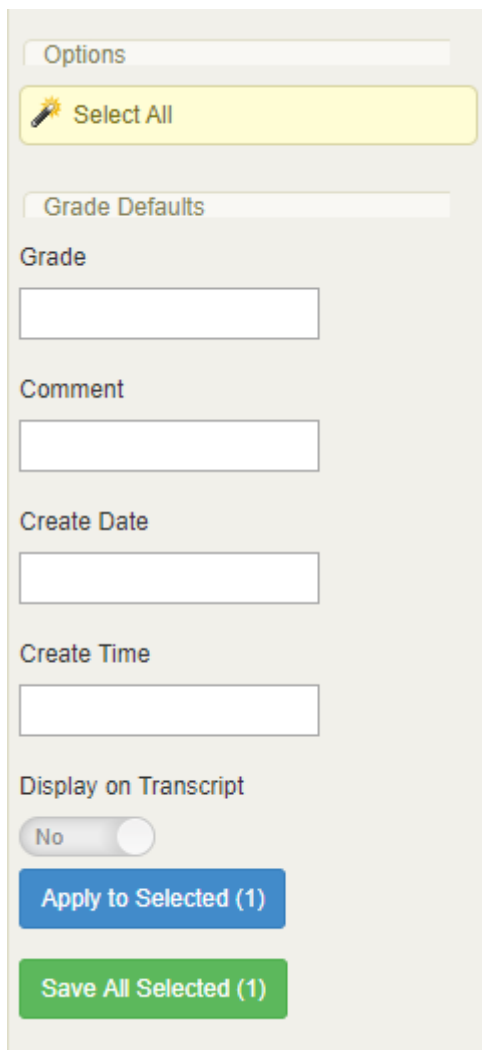
3. Opt to add a **Comment** about the mark you entered. Comments are visible on reports, but are not visible to the graded individuals. The grader's name or reason for grade edit are examples of useful comments.
4. Use the **Create Date** field to bypass the automatic date and time stamp. You can postdate (apply a future date) or backdate (apply a past date) grades. This is useful to correct data entry errors, enter the completion date rather than the date of entry, or to apply grades prior to completion.
5. Set **Display on Transcript** to Yes to show the grade on the learner's transcript. This is relevant only for systems that use the transcript feature.
6. **Save** to apply the grades you have entered.
7. If you modified the date of the grade, the system will require confirmation. Select **Continue** to apply the modified date or **Cancel** to discard the change.

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# Set Grade Defaults

Setting grade defaults can help speed up the manual grading process. Default values can specify grades, comment, and date/time for selected individuals.

1. Use the **Options** menu to define grade defaults. If you cannot see the menu, show the [Tool Panel](#).  
.
2. Select the individuals. Select by individual rows, [Filter and Save Searches](#), or use Select All/Select None from the options menu to narrow your list.
3. Select **Apply to Selected** to apply the defined defaults to all selected individuals.
4. Select **Save All Selected** to complete the grading process.



The screenshot shows a vertical sidebar menu titled 'Options'. At the top is a yellow button with a lightning bolt icon and the text 'Select All'. Below this is a section titled 'Grade Defaults' containing four text input fields: 'Grade', 'Comment', 'Create Date', and 'Create Time'. Below these fields is a toggle switch for 'Display on Transcript', which is currently set to 'No'. At the bottom of the sidebar are two buttons: a blue button labeled 'Apply to Selected (1)' and a green button labeled 'Save All Selected (1)'.

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# View Grades

There are three methods to view grades.

1. Run reports from the [Report Wizard](#) . Instructor accounts may have access to grade reports such

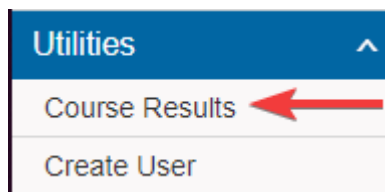
as:

- [R109](#)
- [R202](#)
- [R204](#)

2. The [Grading Tool](#) .

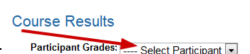
3. Instructor [Utilities menu](#) .

a. Select **Course Results**.



b. Use the drop-down menus to select the individual or module you want to view grades for.

c. Select [Participant Grades](#) to view one individual's grades for the product.



d. Select one of the Grades options to view all the grades for a selected module.

## Course Results



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# Change or Fix Grades

You can edit grades for graded module assets, such as in the case of a data entry error or to reverse a

pass or fail grade. Site Managers may delete entered grades and comments. Select the scenario below that applies.

### Update a Grade without Changing the Pass or Fail Status

1. [Follow the instructions above for grading individuals.](#)
2. Enter the new grade into the **Grade %** field, overwriting the previous entry. The system will warn you if the grade entered is a failing grade.
3. Opt to update the **Comments** field or use the **Create Date** field to overwrite the automatic date stamp.
4. Select **Save** to apply the changes.
5. An alert will warn you of the possible affects of making the change. Confirm the change in alert up by selecting **Continue** to apply the failing grade or **Cancel** to discard the change.

### Reverse a Failed Grade

Use the grade screen to pass an individual with a failing grade.

1. [Follow the instructions above for grading individuals.](#)
2. Enter the new passing grade into the **Grade %** field, overwriting the previous entry. The passing grade meet or exceed the module's defined passing grade. The system will warn you if the grade entered is a failing grade.
3. Opt to update the **Comments** field or use the **Create Date** field to overwrite the automatic date stamp.
4. Select **Save** to apply the changes.
5. An alert will warn you of the possible affects of making the change. Select **Continue** to

pass the individual or **Cancel** to discard the change.



Reversing a failed grade updates associated product completions, certifications, and training pathways/certification sets. The new pass date is the basis for applicable expiry calculations.

## Reverse a Passed Grade

Use the grade screen to fail an individual with a failing grade.

1. Follow the instructions above for grading individuals.
2. Enter the new failing grade into the **Grade %** field, overwriting the previous entry. The failing grade must be less than module's defined passing grade. The system will warn you if the grade entered is a failing grade.
3. Opt to update the **Comments** field or use the **Create Date** field to overwrite the automatic date stamp.
4. Select **Save** to apply the changes.
5. An alert will warn you of the possible affects of making the change. Select **Continue** to fail the individual or **Cancel** to discard the change.



Reversing a passed grade also reverses results related to module and product completions, certifications earned, and qualifications for training pathways/certification sets.

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# Scheduled Courses



This feature is available to [Site Manager](#) , [Course Author](#) , and [Instructor](#) accounts depending on system configuration.

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

Here are more 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 enrol learners on the fly
- Learners may register to a session through the course catalogue
- Learners may cancel their registration to a session any time before it starts



The scheduling tool is available for self registrations through the course catalogue and to manual registrations. Access codes cannot be used to register users for a session. The scheduling tool is not currently compatible with the Informetica storefront.

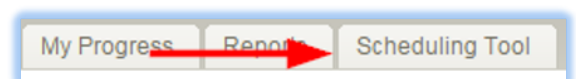


Scheduled sessions are displayed based on the user accessing the scheduling tool, as follows:

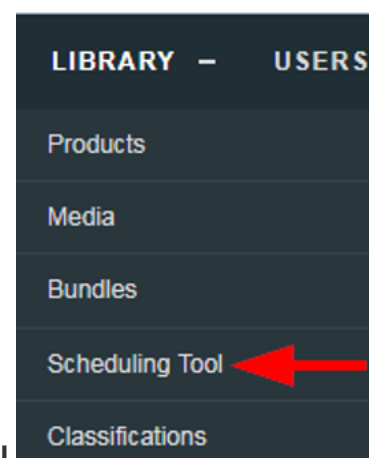
User Type	Visible Offerings
Instructor and Publisher	Only scheduled offerings that you have created or that you are assigned to as the instructor.
Campus Admin	Any scheduled offerings that are in the same campuses that you belong to.
Site Manager	All scheduled offerings.

## Navigate to Scheduling Tool

1. Select the **Scheduling Tool** tab at the top of the page.



- If you are a Site Manager, select **Library > Scheduling Tool**.



2. Optionally use [Filter and Save Searches](#) to locate specific sessions.
3. Optionally [Export](#) the session list.

The image below shows the Scheduling Tool main page.

Scheduling Tool

Records: 5

Export As: [HTML](#) [XLSX](#) [CSV](#) [English](#) [Page Link](#)

List Filter Searches

ID	Name	Product	Start Date	Status	Type	Location	Instructor	Registered	Waitlisted	
1046	012 WHMIS TRAINING	WHMIS	4/16/2019 1:00 PM	Confirmed	Classroom	987 Municipal Drive		0 of 20	0	<a href="#">Edit</a>
1047	013 WHMIS CLASS TRAINING	WHMIS	3/15/2019 1:00 PM	Confirmed	Classroom	Head Office		8 of 25	0	<a href="#">Edit</a>
1042	Serious Play - Strategy	WHMIS	8/7/2018 12:00 AM	Planned	Classroom	489 Time Street, Washington DC	Eastwood, Bill <beastwood@sencia.ca>	0 of 12	0	<a href="#">Edit</a>
1070	WHMIS	WHMIS	1/20/2020 8:00 AM	Cancelled	Blended	987 Municipal Drive	Bassett, Kelly <kbassett>	0 of 25	0	<a href="#">Edit</a>
1071	whmis	WHMIS	1/27/2020 8:00 AM	Confirmed	Classroom	987 Municipal Drive	Bassett, Kelly <kbassett>	0 of 25	0	<a href="#">Edit</a>

## Create a Scheduled Session

1. [Navigate to the Scheduling Tool](#) .
2. Select **Create** from the Options menu. If you cannot see the menu, show the [Tool Panel](#) .
3. Fill out the form.

### Form Field Descriptions

Field Name	Field Type	Required	Description
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. individuals will see the session description when they <b>Click for Info</b> in the catalogue.

Field Name	Field Type	Required	Description
Bundle	Drop-down	No	Narrow the product list by selecting a category bundle.
Product	Drop-down	Yes	Select the product for your session.
Instructor	Drop-down	No	Select an instructor for the session. Note that the instructor must be enroled to the product. The LMS will display a conflict alert if the instructor is already scheduled on the same date and time. A course can still be scheduled with the conflict in place.
Location	Text Input	No	Enter details about where the session is taking place. The LMS will display a conflict alert if the location is already scheduled on the same date and time. A course can still be scheduled with the conflict in place.
Room	Text Input	No	Identify the room that the session is meeting in.
Status	Drop-down	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. For more about statuses, visit <a href="#">Change Session Status</a> .

Field Name	Field Type	Required	Description
Type	Drop-down	Yes	The delivery method is shown in the catalog (e.g. Classroom, Webinar). The enrol button will change based on the type. The type and enrol buttons can be renamed by a Site Manager.
Maximum Attendance	Text Input	No	Enter the number of spots/seats available or leave blank for unlimited. Once this number is reached, individuals attempting to enrol will see that the class is full. If an individual withdraws from the session, it will make a spot available.
Start Date	Date/Time	Yes	Individuals cannot enrol after the start date/time regardless of publish date and status. Instructors can manually enrol a individual past the start date. Note that the LMS displays all times in Eastern Time Zone.
End Date	Date/Time	Yes	The end date indicated when the session is over. Individuals generally should not be enrolled to a session that had ended. Note that the LMS displays all times in Eastern Time Zone.

Field Name	Field Type	Required	Description
Published	Date/Time	No	<p>Select one of the two options to set a time frame to accept enrolments for confirmed sessions:</p> <ul style="list-style-type: none"> <li>• Publish Forever: This will open your session to enrolments from the time you create the product until the time you have changed the status to Completed.</li> <li>• Publish Between: Set a specific date/time range to accept enrolments from the catalog and calendar.</li> </ul>
Waitlist	Number Input	No	<p>An optional waitlist can be set with maximum number and cut off dates. Individuals on the waitlist can be manually moved from the waitlist to enrolment in the session. See <a href="#">Waitlist</a> in the Scheduling Tool topic of the Instructor manual.</p>
Attachment	File Upload	No	<p>After you create the session, you can edit it to upload files such as .ics, .pdf, and .docx to make them available to enrolled individuals. To prevent calendar conflicts, you can attach only one .ics at a time.</p>

4. Select **Create** or **Save and Create Another** to keep the data from the previous save and start a

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new session.

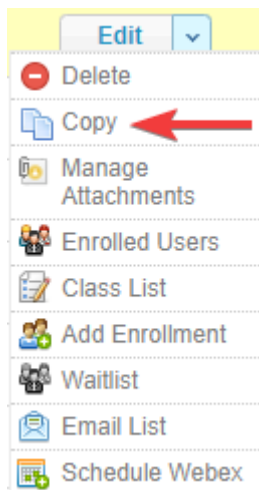
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## Edit a Scheduled Session

1. [Navigate to the Scheduling Tool](#) .
  2. Select the **Edit** button for a session.
  3. Make the necessary changes and then **Save**.
  4. To change the status, see [Change Session Status](#) .
- 

## Copy a Scheduled Session

1. [Navigate to the Scheduling Tool](#) .
2. Select **Copy** from a session's **Edit split button** .



3. Confirm your copy.
4. Find the copy from the list of sessions and **Edit** it (e.g. change the date of the session).

The copy is created with the same name as the original session with the word copy in front of the title.

5. Save.

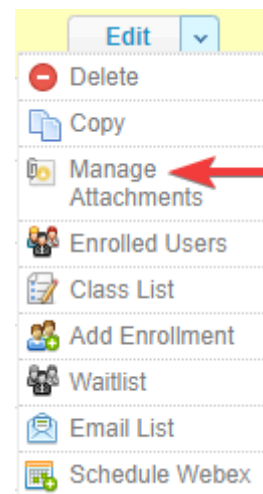
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# Manage Session Attachments

Upload files such as .ics, .pdf, and .docx to make them available to enrolled users. Only one file can be attached during creation, however after creation, you can edit to add multiple attachments.

## Add Attachments

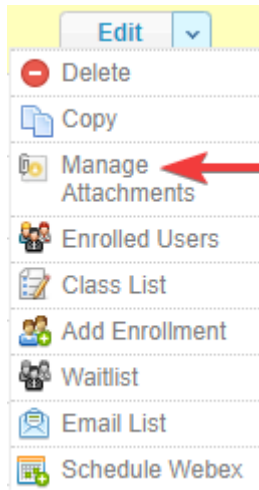
1. Navigate to the [Scheduling Tool](#).





2. Select **Manage Attachments** from a session's **Edit** [split button](#).
3. Choose a method for uploading the file (ftp is for large files).
4. Select the file from your workstation.
5. Select **Continue**.

## Delete Attachments

1. Navigate to the [Scheduling Tool](#).
2. Select **Manage Attachments** from the session's **Edit** [split button](#).



3. Select the **Delete Icon** for the relevant attachment.

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	

4. Confirm the deletion.

## Create a Calendar File

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. Open Outlook.
2. Create the calendar item.
3. Choose File | Save as | iCalendar format (\*.ics).
4. **Save.**

If you have Product enrolment email alerts enabled, the email can automatically attach an ICS file if one exists for the scheduled session. Ensure the following criteria is met for this functionality:

- The scheduling tool is enabled for your LMS.
- An individual must be enrolled to a specific scheduled session.
- An ICS file must be attached/uploaded that scheduled session.



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# Manage Session Enrollments

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## Waitlist

The scheduling tool has an optional waitlist that you can enable for a scheduled session. The waitlist can be set with a maximum number of people allowed on the waitlist, as well as cut-off dates. Individuals to the waitlist can be manually moved from the waitlist to active enrolment by the instructor or other user type with the permissions (e.g. a Site Manager).

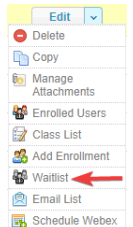
## Navigate to a Waitlist

The waitlist lists all waitlisted users for the session as well as their position on the waitlist.

1. Navigate to the [Scheduling Tool](#) .

2. Select **Waitlist** from a session's **Edit** [split button](#) . If it's not visible, hide the [Tool Panel](#) .

3. Optionally [Export](#) the list.



### Enable a Waitlist

1. [Edit a Scheduled Session](#) .

2. Select the checkbox in front of Enable to create a waitlist for this session.

## Waitlist

☒ Enable

Maximum Size

Start Date:\*

End Date:\*

[Save](#)

[Back to List](#)

3. Enter a number for the **Maximum Size**. This will limit how many users can be waitlisted.
4. Enter the **Start/End Date** and optional times that a user can be waitlisted. A best practise is to prevent users from being waitlisted too close to the start of the session (e.g. two days before the session is scheduled).
5. **Save**.

## Add Users to the Waitlist



An individual may only belong to one waitlist per product. If an individual is enroled to another waitlist for the same product, they are removed from their previous waitlist.

Move enroled users to the waitlist.

1. [Navigate to the waitlist](#).
2. Select **Add Users** under the Waitlist Tools. If you can't see the menu, show the [Tool Panel](#).
3. Optionally use [Filter and Save Searches](#) to locate specific enroled users.
4. **Search**. If you did not apply filters, all users enroled in the session will be listed.

5. Select the checkbox in front of each user you wish to add to the waitlist.

6. Select **Add to Waitlist** at the end of the list of users.

<input type="checkbox"/>	Last Name	First Name	Username	Email Address
<input checked="" type="checkbox"/>	Baker	Erin	erinbaker@sencia.ca	erinbaker@sencia.ca
<input type="checkbox"/>	Bishop	Jillian	jbishop@sencia.ca	jbishop@sencia.ca
<input checked="" type="checkbox"/>	Brent	Sebastian	sbrent@sencia.ca	sbrent@sencia.ca
<input type="checkbox"/>	Charles	Blair	bcharles@sencia.ca	bcharles@sencia.ca
<input type="checkbox"/>	Demo	Sencia	demo-participant@sencia.ca	demo-participant@sencia.ca
<input checked="" type="checkbox"/>	Deven	Bruce	jdeven@sencia.ca	jdeven@sencia.ca

Add to Waitlist

## enrol Users from the Waitlist



When enrolling a user from the waitlist list, the system does not account for the session's maximum attendance. This is to give flexibility to special cases where adding users above the seat limit for the scheduled course may be applicable.

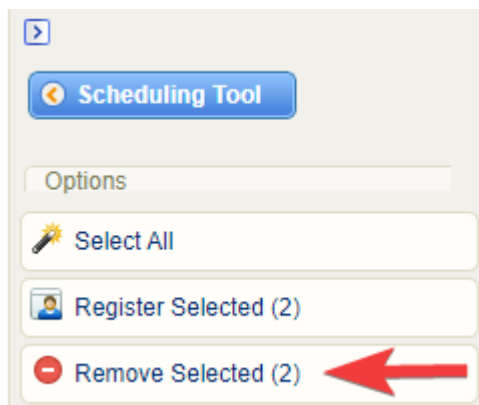
1. Navigate to the waitlist.
2. **Select** the users you wish to enrol.
3. Select **Register Selected** under the Options menu. If you can't see the menu, show the **Tool Panel**.

## Remove Users from Waitlist

Individuals removed from a waitlist will not be enrolled in the session. You may wish to

enrol users from the waitlist instead (see above).

1. [Navigate to the waitlist.](#)
2. [Select](#) the users you wish to remove.
3. Select **Remove Selected** under the Options menu. If you can't see the menu, show the [Tool Panel](#) .



4. **Confirm.**

## Waitlist Email Notifications

There are two automatic email notifications related to the waitlist that may be in use by your system.

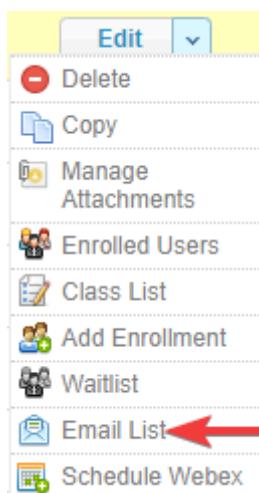
1. **Added to Waitlist** emails are sent when:
  - An administrator adds a user to the waitlist
  - A user adds themselves to a waitlist
2. **Removed from Waitlist** emails are sent when:
  - An administrator removes a user from a waitlist

- A user removes themselves from a waitlist
- An instructor removes a user from the waitlist

## Email Session Participants

You can generate a list of email addresses for enrolled individuals to notify them about changes.

1. [Navigate to the Scheduling Tool](#) .
2. Select **Email List** from a session's **Edit** [split button](#) .



3. Open your email application and then copy/paste the email addresses provided.

### Email List

Select the text below to copy/paste the email addresses provided.

[Click to open email in default email client](#)

Press CTRL + C to copy this text.

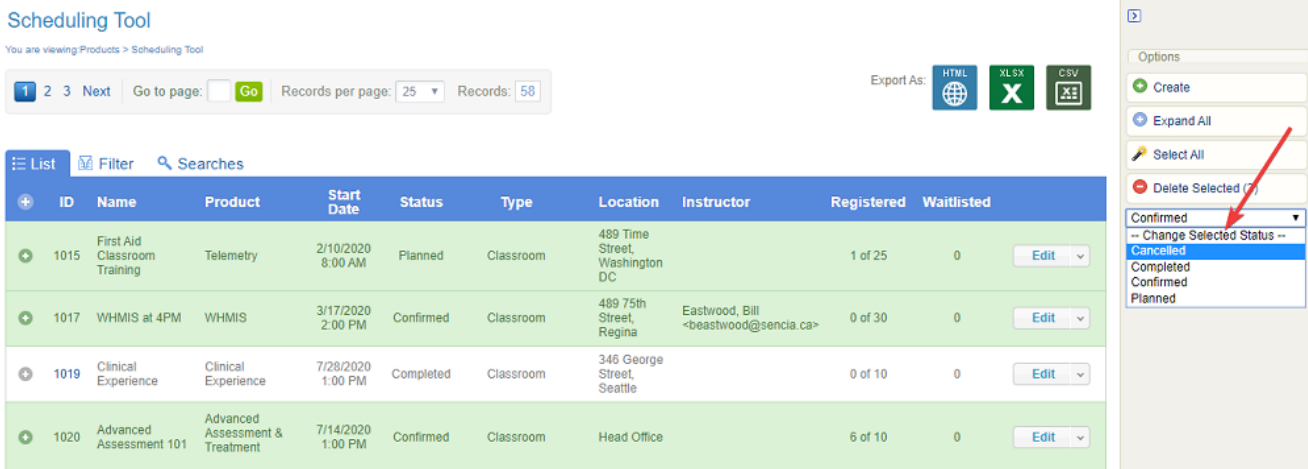


## Change Session Status

# Session Statuses

1. [Navigate to the Scheduling Tool](#) .
2. [Select](#) sessions.
3. Use the drop-down menu **Change Selected Status** under the options menu to change the status of all selected sessions. If you cannot see the menu, show the [Tool Panel](#)

•



The screenshot shows the 'Scheduling Tool' interface. At the top, there's a header 'Scheduling Tool' and a sub-header 'You are viewing Products > Scheduling Tool'. Below this is a navigation bar with '1 2 3 Next', a 'Go to page:' field with a 'Go' button, 'Records per page: 25', and 'Records: 58'. To the right, there's an 'Export As:' section with icons for HTML, XLSX, and CSV. The main part of the interface is a table with columns: ID, Name, Product, Start Date, Status, Type, Location, Instructor, Registered, and Waitlisted. The table contains four rows of session data. To the right of the table is a sidebar with a 'Tools' section containing buttons for 'Create', 'Expand All', 'Select All', and 'Delete Selected (0)'. Below these is a dropdown menu with options: 'Confirmed', '-- Change Selected Status --', 'Cancelled', 'Completed', 'Confirmed', and 'Planned'. A red arrow points to the '-- Change Selected Status --' option in the dropdown menu.

ID	Name	Product	Start Date	Status	Type	Location	Instructor	Registered	Waitlisted
1015	First Aid Classroom Training	Telemetry	2/10/2020 8:00 AM	Planned	Classroom	489 Time Street, Washington DC		1 of 25	0
1017	WHMIS at 4PM	WHMIS	3/17/2020 2:00 PM	Confirmed	Classroom	489 75th Street, Regina	Eastwood, Bill <beastwood@sencia.ca>	0 of 30	0
1019	Clinical Experience	Clinical Experience	7/28/2020 1:00 PM	Completed	Classroom	346 George Street, Seattle		0 of 10	0
1020	Advanced Assessment 101	Advanced Assessment & Treatment	7/14/2020 1:00 PM	Confirmed	Classroom	Head Office		6 of 10	0

4. Confirm the update.

## Session Status Glossary

Session statuses can be used to help filter and organize the sessions. The status list shown below is not exhaustive; more statuses may be available on your system.

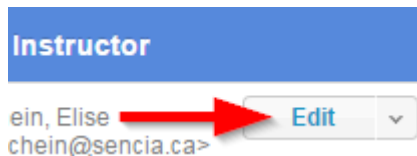
- **Planned:** This status indicates the session is still being prepared and it not yet ready for enrolments. It will also disable enrolment from catalog & calendar.
- **Confirmed:** This status indicates the session is ready for enrolment. It is also the only status that allows enrolment from catalog & calendar.
- **Cancelled:** This status indicates a once confirmed session that is no longer available. It will also disable enrolment from catalog & calendar.
- **Completed:** This status indicates the session that has ended. It will also disable enrolment from

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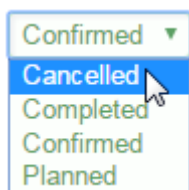
catalog & calendar.

## Cancel a Session

1. Open the [Scheduling Tool](#) and then select **Edit**.



2. Change the Status to **Cancelled**.



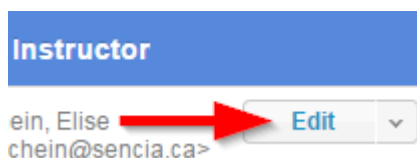
3. **Save**.
4. Optionally [email your class](#) to inform them of the cancellation.
5. To cancel multiple sessions at once, see [Session Statuses](#).



Changing the session to **Cancelled** will remove it from the course calendar and enrolment drop-down menu, but does not remove a user's enrolment to the product.

## Reschedule a Session

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



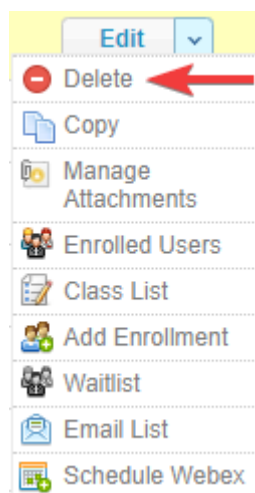
2. Change the **Start Date** and **Time** for your session.
3. **Save**.
4. Remember to update any [file attachments](#), especially an ICS file, if applicable.
5. Optionally [email your class](#) to inform them of the change.

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# 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.

1. Navigate to the [Scheduling Tool](#) .



2. Select **Delete** from the session's **Edit** [split button](#) .
3. Confirm the deletion of the session.
4. You can delete multiple sessions at once from the Options menu.

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

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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.

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Instructor	Can only delete the sessions they have created; cannot delete sessions created by other users.
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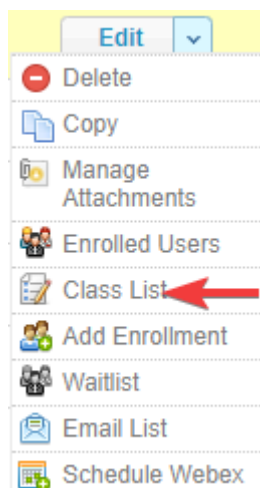
Publisher	Cannot delete any sessions.
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For versioning and retention, it is recommended that you [change the session status](#) to Completed or Cancelled instead of deleting.

## Session Attendance Sheet

Generate a simple class list of the individuals enrolled to 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. [Navigate to the Scheduling Tool](#) .
2. Select **Class List** from a session's **Edit** [split button](#) .



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3. [Export](#) the list to HTML or Excel to use as an attendance sheet.

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## Scheduling Tool Reports

[R224 Scheduled Course enrolments](#) is a dedicated scheduling tool report.



[View video tutorial](#) .

The following reports have a scheduled session filter. Please see the [Reports Manual](#) for more details.

- R202
- R203
- R204
- R208
- R213
- R219
- R301

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## Scheduling Tool Dictionary Labels

A Site Manager can change any of the buttons or navigation wording used in the Scheduling Tool.

Here are the associated variable labels used with the Scheduling Tool. For more information on updating labels, see [Languages and Dictionaries](#).

Label Name	Default English Dictionary
name_product_offering_plural	Product Offering
name_product_offering	Product Offering
product_offering_name	Name
product_offering_start_date	Start Date
product_offering_type	Type
product_offering_status	Status
product_offering_location	Location
product_offering_id	ID
reports_select_product_for_offering	Select a product to view offerings.
reports_no_product_offerings	No available product offerings
product_offering_desc	Description
product_offering_room	Room
product_offering_enrolment_limit	Maximum Attendance
product_offering_publish_date	Publish Date
product_offering_publish_end_date	Publish End Date

Label Name	Default English Dictionary
word_attachment	Attachment
delete_product_offering_message	Are you sure you would like to delete the following Product Offering Records?
product_offering_edited	Edited
product_offering_created	Created
product_offering_cdate	Create Date
product_offering_edate	Edit Date
product_offering_status_1	Cancelled
product_offering_status_2	Completed
product_offering_status_3	Confirmed
product_offering_status_4	Planned
product_offering_type_1	Classroom
product_offering_type_2	Webinar/Teleconference
product_offering_type_3	Live
3219 product_offering_missing_product	You must choose a

Label Name	Default English Dictionary
	Product
product_offering_missing_product_offering_name	You must enter a name for the Product Offering
product_offering_missing_product_offering_start_date	You must enter a start date
product_offering_generating_file	Generating File.
product_offering_attach_file	Attach File
product_offering_type_4	Blended
tab_product_offering	Product Offering
product_offering_upload_title	Add Attachment
product_offering_upload_choice	Select method to add attachment
product_offering_ftp_upload	Manage FTP
product_offering_http_upload	HTTP Upload
name_product_offering_media_list	Manage Attachments
product_offering_filename	File Name
product_offering_file_last_modified	Last Modified

Label Name	Default English Dictionary
product_offering_file_size	Size
product_offering_media_list_no_media	No media elements exist.
product_offering_delete_media_confirm_title	Confirm Attachment Delete
product_offering_delete_media_confirm	Once deleted, an attachment cannot be recovered. Are you sure you want to delete the following?
command_manage_attachments	Manage Attachments
word_publish_forever	Publish Forever
word_publish_between	Publish Between
word_published	Published
disable_catalog_registration	Disable Catalog Registration
command_add_to_calendar	Add to Calendar
command_click_for_info	Click for Info

Label Name	Default English Dictionary
command_click_for_attachments	Click for Attachments
command_drop	Drop
product_offering_email_list	Email List
product_offering_email_list_empty	No registered Users at this time
command_email_list	Email List
command_class_list	Class List
name_html	HTML
name_excel	Excel
product_offering_email_list_choice	Select file type of choice
product_offering_class_list	Class List
product_offering_num_enrolments	Number of enrolments
class_list_header_lname	Last Name
class_list_header_fname	First Name
class_list_header_username	Username
class_list_header_attended	Attended

Label Name	Default English Dictionary
class_list_header_other	Other
class_list_header_integration_username	Integration Username
word_attachments	Attachments
confirm_drop	Confirm Drop
product_offering_email_list_instructions	Select the text below to copy/paste the email addresses provided.
word_generated	Generated
product_offering_class_list_title	Attendance Sheet
product_offering_mailto_text	Click to open email in default email client
command_add_registration	Add Registration
course_catalog_no_bundle_name	Miscellaneous
command_register	Register
add_registration_instructions	Click Search to get list of unregistered Users
add_registration_none_found	No Users were found



Label Name	Default English Dictionary
product_offering_choose_offering	Choose Product Offering
product_offering_type_1_register	Schedule Now
product_offering_type_2_register	Register Now
product_offering_type_3_register	Schedule Now
product_offering_type_4_register	Register Now
course_catalog_status_not_registered	Not Registered
course_catalog_registration_completion_status	Completion Status
course_catalog_completion_complete	Complete
course_catalog_completion_incomplete	Incomplete
course_catalog_you_have_registered_for	You have registered for
course_catalog_approval_pending	Approval is pending
confirm_registration_title	Confirm Registration
confirm_registration_content	Are you sure you would like to register these ([[ entity_count ]]) Users?
registration_success_title Registration	Successful

Label Name	Default English Dictionary
registration_success_content	Users registered successfully
course_catalog_no_items	No course catalog items available.
course_catalog_switch_view	Switch View
product_offering_maximum_enrolment_reached	Maximum enrolment reached.
product_offering_too_many_users_title	Alert - Too many users selected
product_offering_too_many_users_text	Operation cannot be completed. Maximum enrolments left
product_offering_enrolments_left	enrolments Left
product_offering_warning_enrolment_limit_reached	The Product Offering has reached the maximum enrolment limit of
product_offering_entity_type_4	Instructor
product_offering_enrolment_limit_invalid	Please enter a valid

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Label Name	Default English Dictionary
	number for maximum attendance
product_offering_add_registration_title	Add Registration
course_catalog_calendar_course_info	Courses without scheduled dates are not visible on the calendar.
product_offering_ics_warning	Only 1 ISC file is allowed. An *.ICS file upload will overwrite an existing ISC file.