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



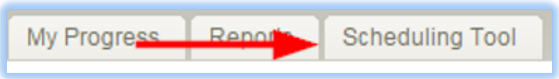
The scheduling tool is available for self registrations through the course catalogue and to manual registrations. Access codes cannot be used to register users for a session. The scheduling tool is not currently compatible with the Informetica storefront.

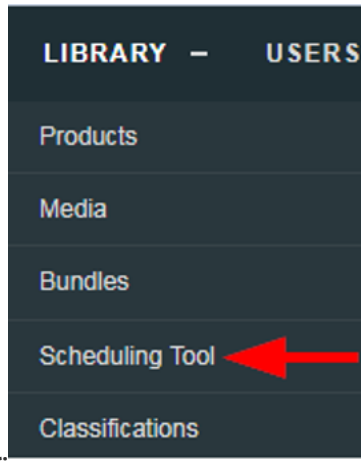
Scheduled sessions are displayed based on the user accessing the scheduling tool, as follows:

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

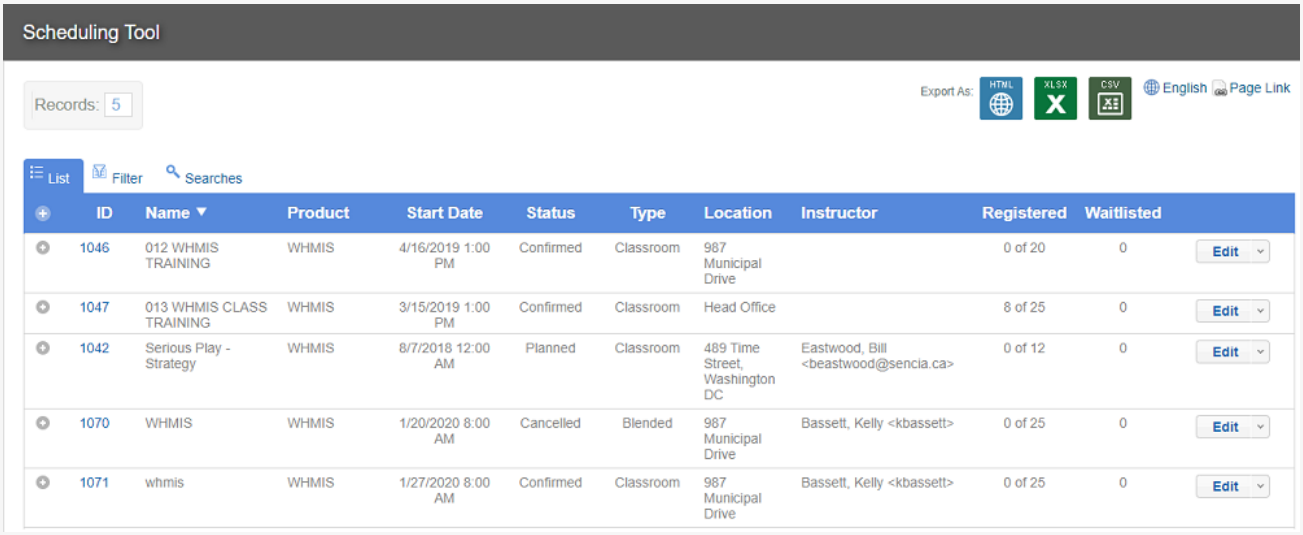
1. Select the **Scheduling Tool** tab at the top of the page.





   - 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.



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	Edit
1047	013 WHMIS CLASS TRAINING	WHMIS	3/15/2019 1:00 PM	Confirmed	Classroom	Head Office		8 of 25	0	Edit
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	Edit
1070	WHMIS	WHMIS	1/20/2020 8:00 AM	Cancelled	Blended	987 Municipal Drive	Bassett, Kelly <kbassett>	0 of 25	0	Edit
1071	whmis	WHMIS	1/27/2020 8:00 AM	Confirmed	Classroom	987 Municipal Drive	Bassett, Kelly <kbassett>	0 of 25	0	Edit

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 **Click for Info** 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 Change Session Status.

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 not be enroled 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	Select one of the two options to set a time frame to accept enrolments for confirmed sessions: • 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. • Publish Between: Set a specific date/time range to accept enrolments from the catalog and calendar.
Waitlist	Number Input	No	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 Waitlist in the Scheduling Tool topic of hte Instrcutor manual.
Attachment	File Upload	No	After you create the session, you can edit it to upload files such as .ics, .pdf, and .docx to make them available to enroled individuals. To prevent calendar conflicts, you can attach only one .ics at a time.

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

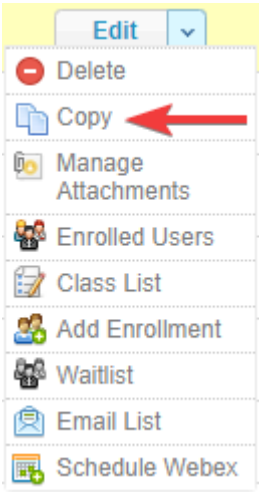
new session.

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).

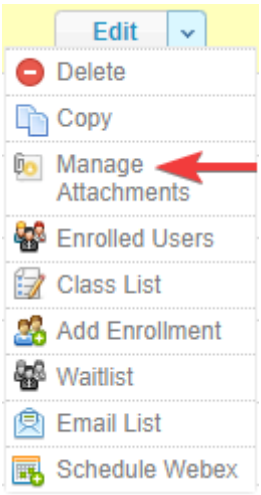
   The copy is created with the same name as the original session with the word copy in front of the title.
5. Save.

Manage Session Attachments

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

Add Attachments

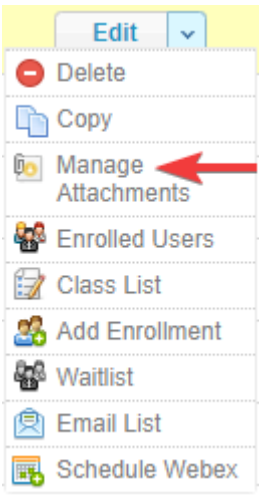
1. Navigate to the Scheduling Tool .
2. Select **Manage Attachments** from a session's **Edit** split button .



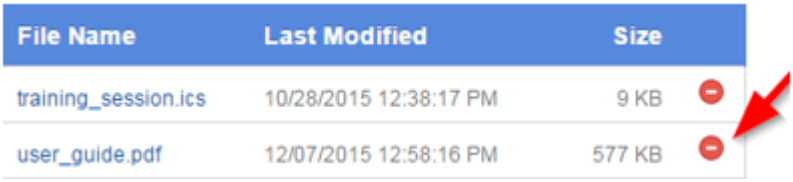
3. Choose a method for uploading the file (ftp is for large files).
4. Select the file from your workstation.
5. Select **Continue**.

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.



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 enroled to a specific scheduled session.
- An ICS file must be attached/uploaded that scheduled session.

Manage Session Enrollments

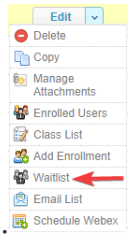
Waitlist

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.

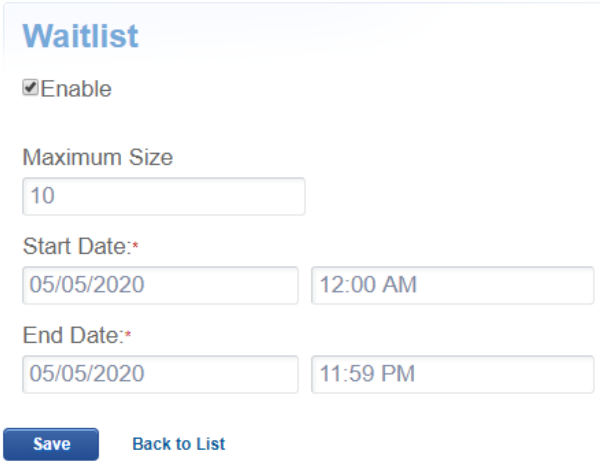
1. Navigate to the Scheduling Tool .



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.



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.



enrol Users from the Waitlist

When enroling 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.

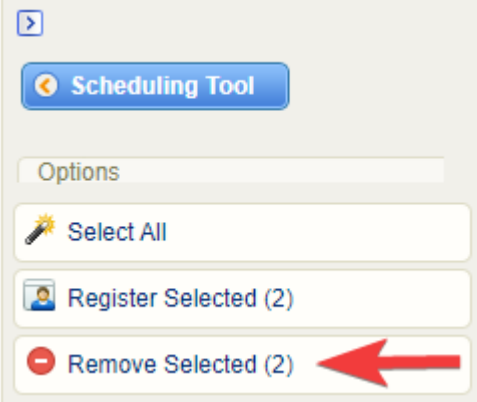
1. Navigate to the waitlist.
2. Select the users you wish to enrol.
3. Select **Register Selected** under the Options menu. If you can't see the menu, show the Tool Panel .

Remove Users from Waitlist

Individuals removed from a wailist will not be enroled 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.

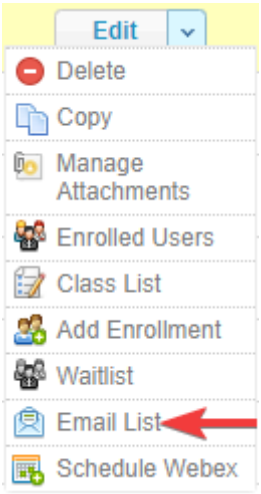
1. **Added to Waitlist** emails are sent when:
    - An administrator adds a user to the waitlist
    - A user adds themselves to a waitlist
2. **Removed from Waitlist** emails are sent when:
    - An administrator removes a user from a waitlist

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

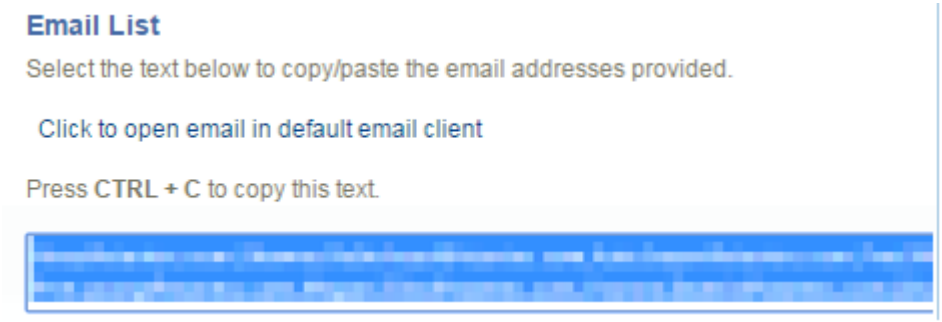
Email Session Participants

You can generate a list of email addresses for enroled 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.

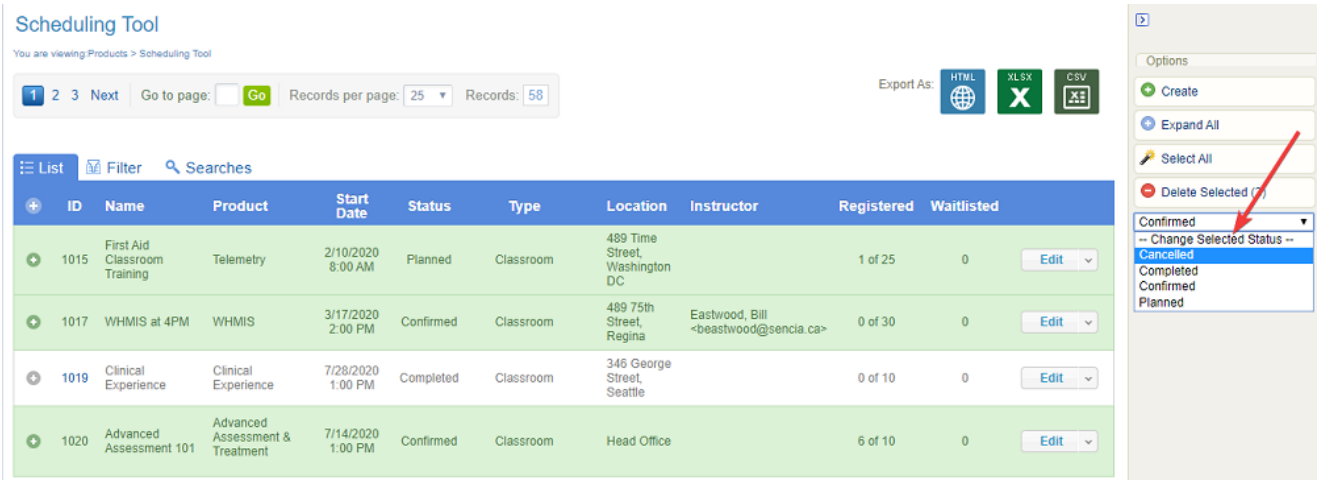


Change Session Status

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

   .



4. Confirm the update.

Session Status Glossary

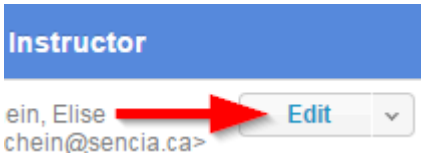
Session statuses can be used to help filter and organize the sessions. The status list shown below is not exhaustive; more statuses may be available on your system.

- **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

catalog & calendar.

Cancel a Session

1. Open the Scheduling Tool and then select **Edit**.



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

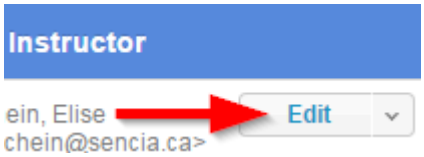


3. **Save**.
4. Optionally email your class to inform them of the cancellation.
5. To cancel mutiple sessions at once, see Session Statuses.

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.

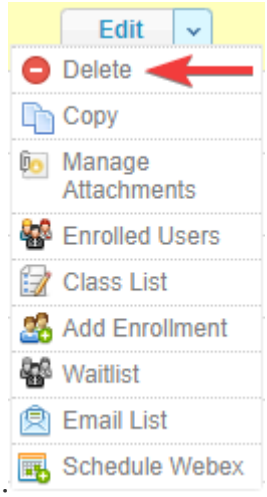


2. Change the **Start Date** and **Time** for your session.
3. **Save**.
4. Remember to update any file attachments, especially an ICS file, if applicable.
5. Optionally email your class to inform them of the change.

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 enroled 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:

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.

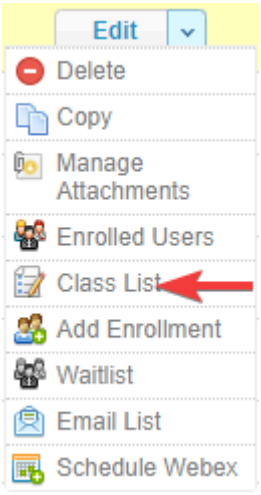
Instructor	Can only delete the sessions they have created; cannot delete sessions created by other users.
Publisher	Cannot delete any sessions.

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

Session Attendance Sheet

Generate a simple class list of the individuals enroled 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 .



3. Export the list to HTML or Excel to use as an attendance sheet.

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

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

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.