Training Contact User Guide

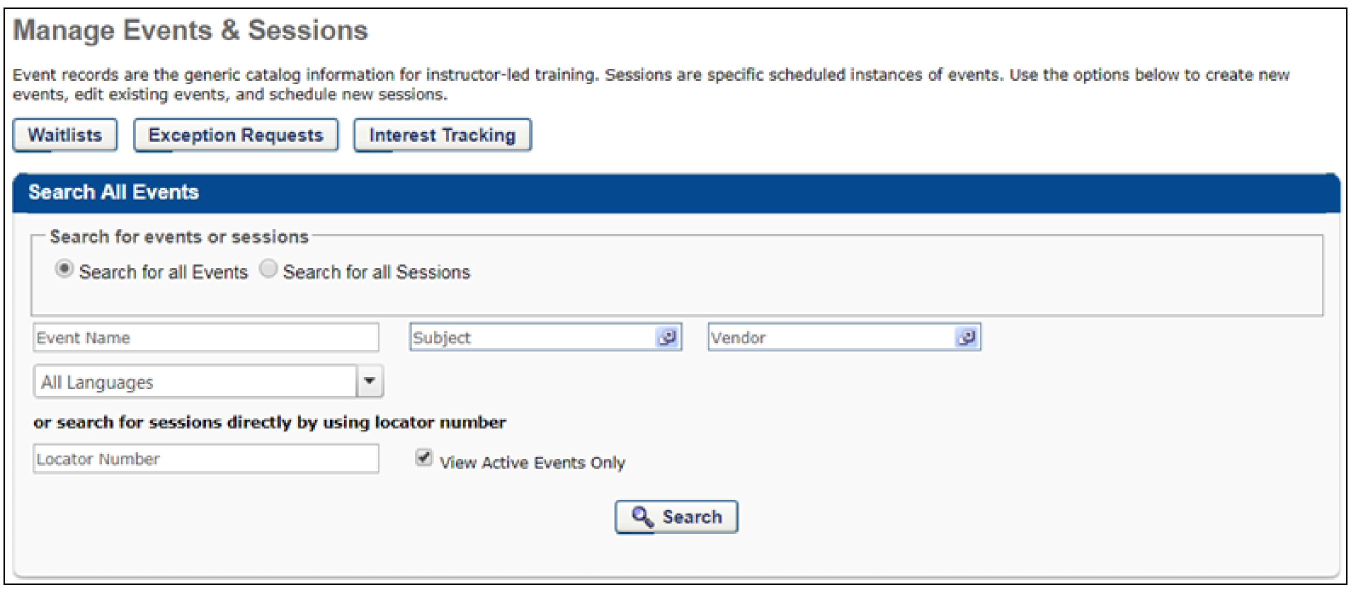
ILT Event Overview - Search for Events

The **Search for all Events** option is selected by default in the Search for All Events or Sessions section when accessing the **Manage Events & Sessions page** from the **Learning Admin tab**, and enables administrators to search for events. Use the Search All Events search criteria table.

The following search filters are available:

- Vendor
- Subject
- Event Name
- Language
- Locator Number

Check the View Active Events Only option to include active only events in your search results.



Information and Options

The following information is displayed for each event in the Events table:

- Event Name
- Subjects
- Vendor
- Language(s)
- Tentative Sessions
- Approved Sessions
- Completed Sessions

A legend of available event management options and their corresponding icons appears above the Events table. The following options are available for events in the Events table:

1. Options - The following options are available in the Options column:
   A. View Sessions

Legend
Edit Evaluation | View Evaluation Report | Edit Event | Copy Event | View Sessions | Map Certification

Create New Event | Export to Excel

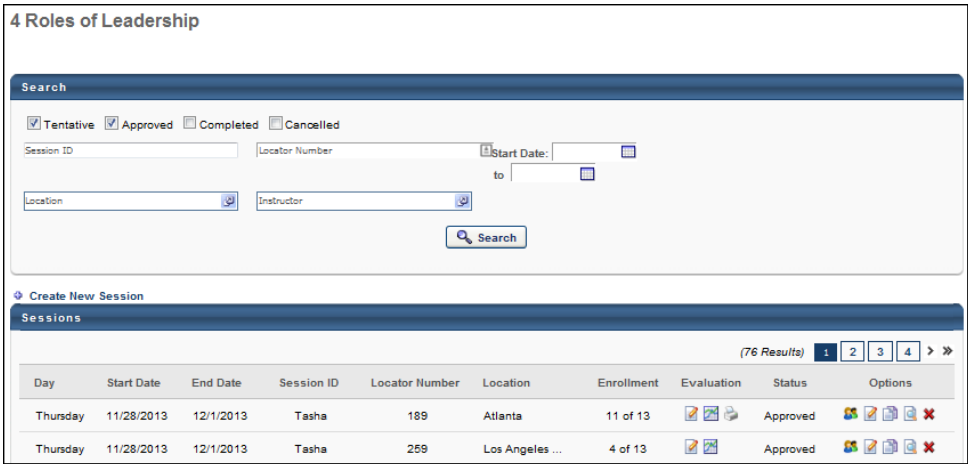
Events

(5 Results)

Event Name	Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
Advanced Leadership II	Management & Leadership "Leadership 10"	GoToMeeting	English (US)	11	5	6		
Don't Throw Me Shade-Sales Effectiveness	Customer Service	Training Tracks	English (US)	0	0	0		
Effective Communications	Productivity Training	GoToMeeting	English (US) ...	0	6	0		
Employee Orientation	New Hire	GoToMeeting	English (US)	0	13	0		
Project Management Basics	Management & Leadership "Leadership 10"	GoToMeeting	English (US)	0	0	0		

ILT Session Overview

Sessions may be instructor-led courses held in a classroom or virtual webcast sessions. It is helpful to think of sessions as scheduled instances of instructor-led training courses or individual occurrences of events. Course events include all of the "parent" information which defaults to the session, such as the course description, the objectives, the vendor, and the subjects. However, sessions hold more specific data, including the times, locations, instructors, and resources for a specific course instance.



Search for Sessions

Select to view sessions that are in a Tentative, Approved, Completed, or Canceled status, or search by Session Number or Locator Number.

Sessions List

The following information is displayed for each session in the Sessions list:

- Day
- Start Date
- End Date
- Session ID
- Locator Number
- Location
- Enrollment
- Status

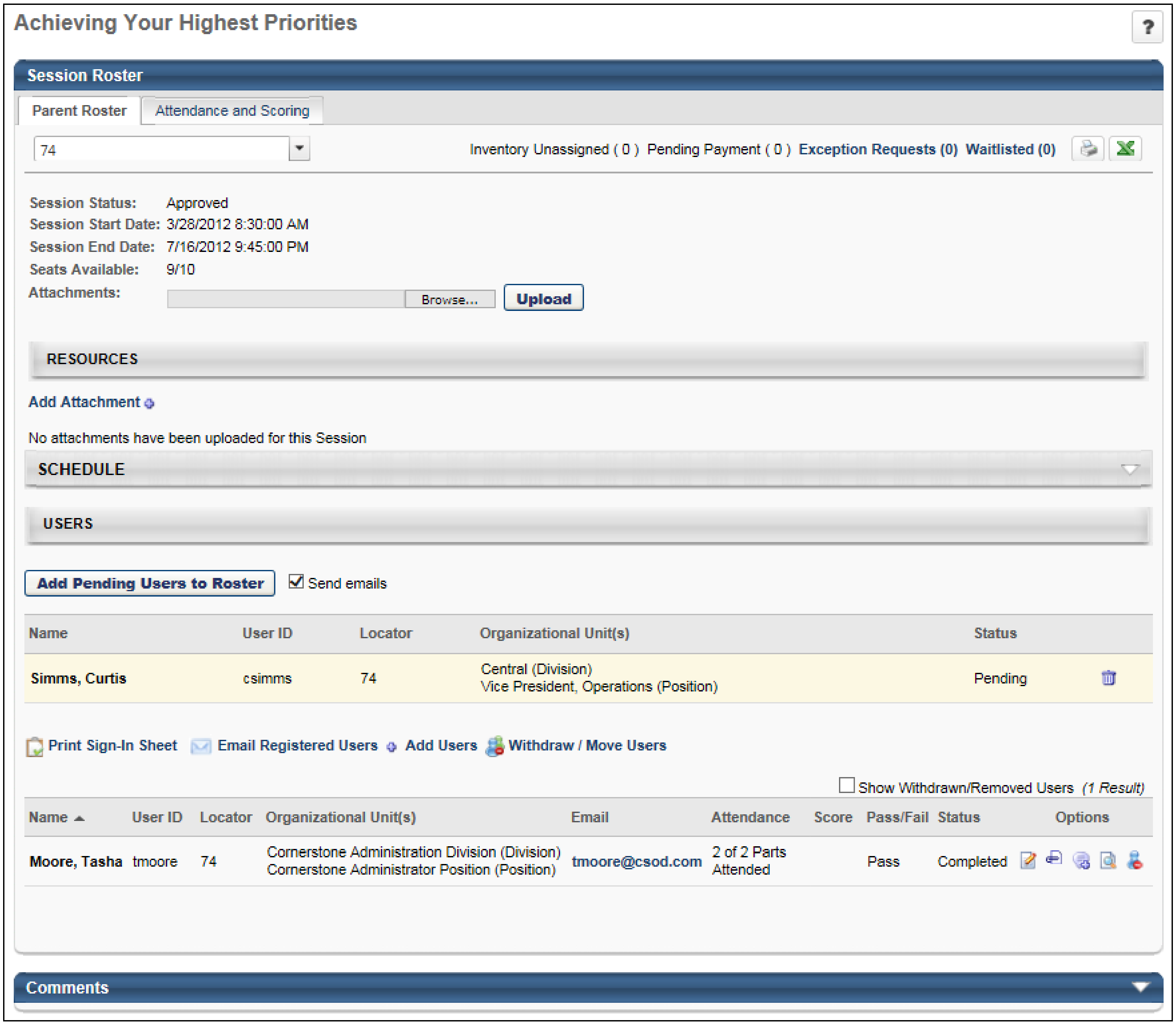
Options

The following options are available in the Options column:

1. View Roster - Click this icon to view and manage roster.
2. View Sessions Details - Click this icon to view session details.

Session Roster - Roster Tab

The Roster tab displays all of the users registered for the session along with the session schedule. This tab also contains links to view users that are on the waitlist or exception requested list for the session, as well as any users that have reserved a registration spot for the session. Instructors perform actions on the roster, including printing the sign-in sheet, email registered users, add users, and withdraw users.



General Information

At the top of the page, the status of the session is displayed. ***Note:*** *If the status is Completed, the Re-Submit link no longer appears.*

Seats Available

The Seats Available field displays the number of seats available and the maximum number of possible users. For example, if a session can have a maximum of 15 users and 5 have registered thus far, the Registration value displays 10/15, indicating there are 10 remaining open seats.

Attachments

The Attachments feature allows administrators and instructors to add attachments to the roster. Attachments display below the Attachments field. This feature is only available to administrators and instructors with permission to add attachments to a roster. Acceptable file types are pdf, jpeg, gif, Microsoft Excel, Microsoft PowerPoint and word documents. There is no limit to the number of files that can be uploaded to the page. The upload maximum size is 25 MB per item.

In the upper-right corner, the following session action links may appear:

- Exception Requested - This link displays the number of users that have a pending exception request. If no exception requests have been made for the session, the link does not appear. Click the link to go to the Exception Request page.
- Waitlisted - This link displays the number of users that are on the waitlist for the session. If waitlists are not enabled for the event or if there are no users on the waitlist, the link does not appear. Click the link to go to the Manage Waitlist page.

Resources

This section enables administrators to view and manage attachments for the session. The visibility of each attachment can be determined by the administrator. For example, some attachments may be visible to only administrators, while other attachments may be visible to all users. In addition, attachments can be made visible to users only if they are registered for the corresponding session.

When the session is first created, this section contains any attachments that were added on the Session Defaults page for the event.

Schedule

The Schedule section appears collapsed by default, but when expanded displays the schedule of the session. Click the View Map to view a map of the location if available.

Add Pending Users to Roster

The **ADD PENDING USERS TO ROSTER** button is only available if there are users who have been selected to be added to the session, but have not yet been enrolled in the session. Also, this button is only available to users who have permission to add pending users to the roster.

Roster Table

Above the roster table, the following user action links may appear:

- Print Sign In Sheet - This link opens another window displaying the printable sign in sheet.
- Email Registered Users
- Add Users - When an instructor or administrator clicks the Add Users link, this opens the Select User pop-up, in which the instructor or administrator can search for and select multiple users to be added to the session roster. Users who are already registered for the session or are pending registration cannot be selected from the pop-up.
- Withdraw or Move Users - This option opens the Batch Withdraws or Move Users pop-up window. The administrator can then withdraw a user from the session. If the user is withdrawn, they no longer appear on the active roster. This option is only available to users that have permission to batch withdraw or move users from a roster.

The roster table displays the following information for each user that is registered for the session.

If the Show Withdrawn/Removed Users option is selected, users who were previously registered, but are withdrawn also display in the table.

- Name
- User ID
- Organizational Unit(s)
- Email - Displays the user's email address if one is defined in their user record. Click the email address to create an email to that user in your default email application.
- Attendance - Displays the number of total session parts attended.

- Score - Displays the user's score for the session, which is entered by the instructor on the Attendance and Scoring page. If no score is entered, the value is blank.
- Pass/Fail - Displays if the user passed or failed the session, based on the session settings. If no value is determined, the value is blank.
- Status - Displays the user's status for the session.

Roster Options

In the Options column, next to each user, the following options are available:

- History - Click this icon to open the History pop-up, where you can view the history of the user with regards to the session.
- Withdraw/Remove - Click this icon to navigate to the Withdraw Registration page.

Comments Panel

The comments section appears below the roster table and displays all of the comments left for the session. The author and date stamp is displayed for each comment. This table is collapsed by default. If the user has permission to manage the roster, they also have the ability to leave a comment. Users can delete comments they have left using the Delete icon. Comments are limited to 3000 characters.

Export Roster Table

The roster table can be exported to Printable Version and Excel using the icons in the upper-right corner of the Roster tab. The exported roster includes the details from the roster table, but none of the information on the Assignments or Attendance and Score tab.

Session Roster - Add Users to a Session

On the Session Roster, instructors and administrators may be able to add users to the session roster. When an instructor or administrator clicks the Add Users link on the Session Roster page, the instructor or administrator is directed to a Select Users pop-up that allows them to select the users to be added to the session roster. In addition, the instructor or administrator is able to know immediately if a user is added to the session roster.

To access the ILT session roster, go to **ILT > Manage Events & Sessions**. Search for the appropriate event and next to the event in the search results, in the Options column, click the View Sessions icon . Next to the appropriate session, in the Options column, click the View Roster icon .

To add users to the session, click the Add Users link.

When an instructor or administrator clicks the Add Users link, this opens the Select User pop-up, in which the instructor or administrator can search for and select multiple users to be added to the session roster. Users who are already registered for the session or are pending registration cannot be selected from the pop-up.

Add Pending Users to Roster

The selected users have not yet been enrolled in the session, and they are displayed in a table above the enrolled users. This enables the administrator or instructor to view all of the users who have not yet been added to the session.

To disable any emails that may be sent when the users are added to the session, uncheck the Send emails option. This option must be unchecked before the **ADD PENDING USERS TO ROSTER** button is clicked. Disabling emails may be useful when adding users who attended the session but were not on the roster. In this scenario, the user does not need to be alerted that they were added to the roster.

- When users are added to a completed session and the roster is submitted, if the users are in a Completed status, then only the Training is Completed email is sent, if configured.
- When users are added to an approved session, only the ILT Session Register email is sent, if configured.

To enroll the pending users in the session, click the **ADD PENDING USERS TO ROSTER** button. Up to the first 10 users in the Pending Users table are added to the roster when the button is clicked.

When pending users are added to the roster, the system checks the number of available seats for the session. This includes the session's maximum registration and any reservations and restrictions. If the maximum registration or restrictions are exceeded, then the options that are available to the instructor or administrator may vary.

When a user is added to the roster, the following occurs:

- Session is immediately assigned to the users.
- The session has no due date.
- Any prerequisites and pre-work associated with the session are bypassed.
- The user is assigned, approved, and registered. If payment is required, then the user is in Approved status until payment is received. If the session has ended, then users are automatically assigned a status of Completed.
- Session emails are queued unless they are disabled.

Pending Users Table

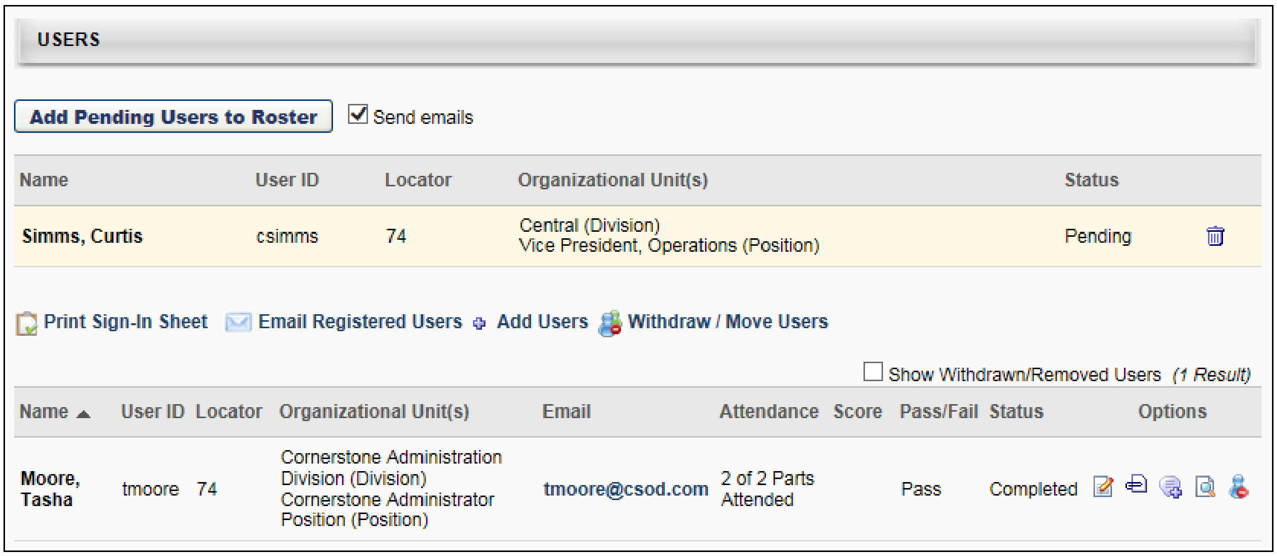
The Pending Users table displays all users who have been selected to be added to the roster but have not yet been added. If a user is successfully added to the roster, then they are removed from this table.

The following information is displayed for each user who is pending enrollment:

- Name
- User ID
- Locator
- Organizational Unit(s)
- Status

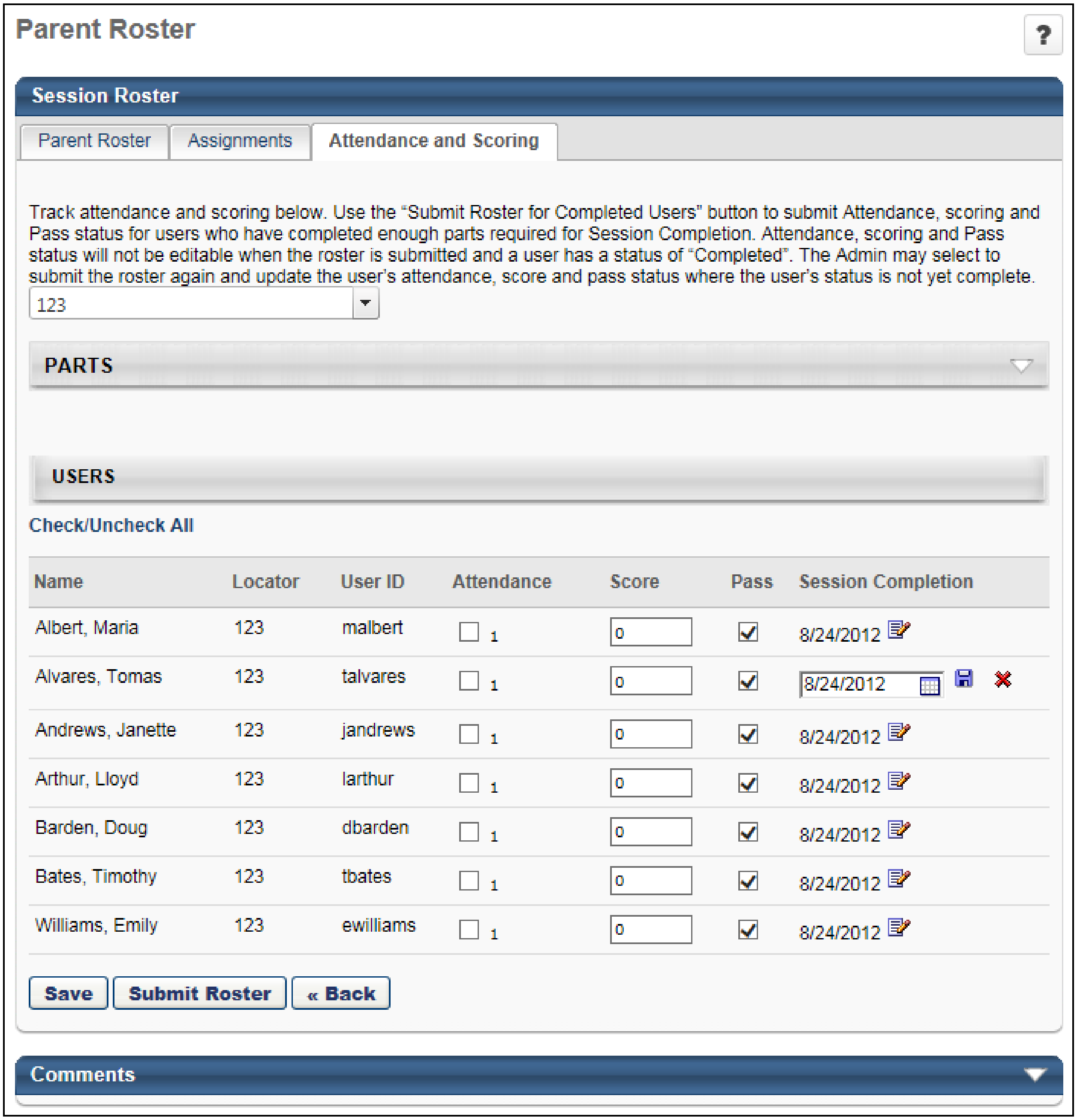
To remove a pending user, click the Remove icon to the right of the appropriate user in the Pending Users table.

Note: *If the roster is submitted or if the session is cancelled, then all pending users are removed from the session.*



Session Roster - Attendance and Scoring Tab

The Attendance and Scoring tab allows administrators and instructors to manage attendance, enter scores, and pass/fail values, if applicable.



Parts Section

In the Parts section, each part within the session displays along with the part date and time. Each part is listed with a part number. The part numbers correspond with the Attendance option boxes in the Attendance and Scoring table. The Parts section is collapsed by default.

Users Section

In the Users section, click the Check/Uncheck All Attendance link to mark each user as attended for each part of the session. All Attendance option boxes that are unchecked will be selected. Click the link a second time to clear all selected Attendance option boxes. The Check/Uncheck All Attendance link is only visible before the administrator or instructor submits the final roster.

If more than twenty users are registered for an instructor-led training (ILT) session, the Attendance and Scoring page of the session roster paginates, and users with permission to manage the roster can navigate through pages of registered users, with up to twenty users displaying per page.

Attendance and Scoring Table

The Attendance and Scoring table displays the following information for each user that is registered for the session:

- Name
- User ID
- Attendance - An Attendance box appears for each part within the session. These parts are listed in the Parts section above the table. For each part, select whether or not the user was in attendance. For example, if a user attended part 1 and 3 for a session, but missed part 2, select the Attendance box for 1 and 3, but not 2. Attendance can only be edited before the final roster is submitted. Once the final roster is submitted, all attendance is final. Click the Check/Uncheck All link to select or deselect all attendance boxes.
    - If a user has none of the Attendance checkboxes selected for a session, their training status is No Show when the roster is submitted.
    - If a user is not marked as attending the minimum number of required parts, their training status is Incomplete when the roster is submitted.
- Score - In this field, enter the user's score for the session. Scores can only be edited before the final roster is submitted. Once the final roster is submitted, all scores are final. Scores are visible to users on their training details page.
- Pass - Select this option to indicate the user has achieved a passing score for the session. When the final roster is submitted, if this option is selected, the Pass/Fail column on the Roster tab displays Pass, otherwise it displays Fail. The Pass option can only be edited before the final roster is submitted. Once the final roster submitted, the Pass option is final. If the Pass checkbox is not selected for a user, their training status is Incomplete when the roster is submitted.

Session Completion

The Session Completion column displays the date on which the user completed the session.

Session Completion - Edit

To edit the session completion date for a user, click the Edit icon to the right of the user's session completion date. The session completion date can be set to any date, even if the date is before the session start date or after the session end date.

After selecting the appropriate date, click the Save icon to the right of the Session Completion date. Then, click the **SAVE** button at the bottom of the page to save the entire roster. ***Important:*** *The updated session completion date is not saved until the entire roster is saved. In addition, the user's transcript is not updated until the roster is submitted.*

Once the session roster is submitted, the user's transcript is updated with the new session completion date. However, administrators may edit the user's session completion date and submit the roster multiple times, if necessary.

Save or Update

Click **Save** or **Update Attendance** to save any changes made to the attendance and scoring (the button is labeled Save for WebCasts, otherwise it is labeled Update Attendance). The button is available as soon as at least one user is registered for the session, and remains available even after the final roster is submitted.

Submit Roster

Click **Submit Roster** to finalize the roster attendance and scores. The Submit Roster button is available immediately after the last part of the session is concluded. Once this button is clicked, all user statuses for the session are updated and appear on the user's transcript record.