



PortfolioCo

# Learning Management System Standard Operating Procedure

## Adding a Course - Live Training Event

Version 1.2

Effective: November 30, 2023  
Prepared by: [Your Name]

NOTE: All names in this document are fictional and used solely for demonstration purposes in a professional portfolio.

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## Document History

Version	Date	Additions/Changes	Prepared/Reviewed By
1.0	11/30/2023	Initial Draft	[Reviewer Name]
1.1	01/12/2024	Update Add a Live Event to Calendar section	[Reviewer Name]
1.2	06/26/2024	Add Create URL section	[Reviewer Name]

## Purpose of SOP

This Standard Operating Procedure (SOP) is designed to outline the procedure that the Staff should follow when adding a live event into the Learning Management System (LMS).

## Audience

Customer Enablement Staff  
Solutions Consultant

## Add a Live Event Course to the Library

A live event must first be included in the LMS library before it can be scheduled on the calendar. If the live event has not been added to the library yet, please email a request to the LMS Administrator for the event to be added.

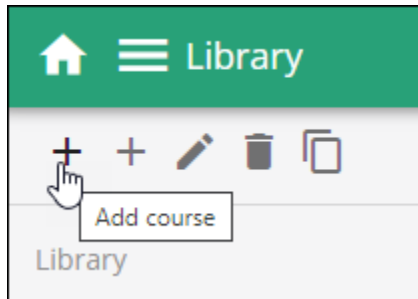
When submitting a request for an event to be added to the library, please include the following details:

- Course Name
- Duration
- Description
- Fee

**Process Owner:** LMS Administrator

To add a Live Training Event to the Library, follow steps below:

1. Navigate to the Library by clicking the hamburger menu ☰, then click Library.
2. Click Add Course +.



3. Enter the following course information:
  - a. Select Course Type - **Scheduled**
  - b. Course Name – **Naming convention *Product: Purpose – Type***
  - c. Owner Name – **Training Team**
  - d. Record Status – **Active**
  - e. Delivery – **Virtual Live Event (Webinar)**
  - f. Sub-delivery - **Virtual Live Event (Webinar)**
  - g. Registration Rule – **Open**
  - h. Duration – **Enter the time in minutes or hours.**
  - i. Enrollment Open Period (Days) – **Enter how many days in advance customers can register for class.**
  - j. Enrollment Close Period (days) – **Enter how many days before a class you want to end registration.**
  - k. Capacity – **This section is not important.**
  - l. Category – **Select a product from the list.**
  - m. Card Description – **Enter card description.**
  - n. Description – **Enter a description** of the course.
  - o. Vendor – **University**
  - p. Survey – **Post Training Survey**
  - q. **Override** - Check the override Default Threshold box.

4. Click **Save**.

## Add a Live Event to Calendar

Once the LMS Administrator has successfully added the live event to the LMS library, the next step involves scheduling it on the calendar. This task falls under the responsibility of the individual conducting the live event, namely, the trainer.

**Process Owner:** Trainer

To add a Live Training Event to the calendar, follow the steps below:

1. Navigate to the Calendar by clicking the hamburger menu ☰, then click **Calendar**.
2. Click **+** to add Event.
3. Click **Select**, enter the **course name**, then click the **magnify glass**.

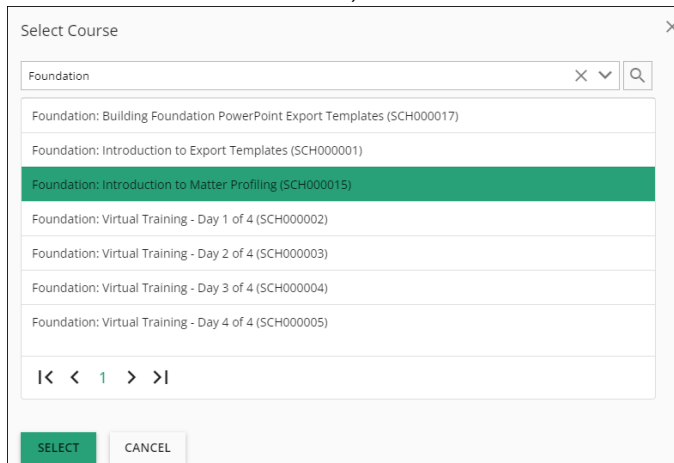


Select Course

Foundation

SELECT CANCEL

4. Click on the **course name**, then click **Select**.



Select Course

Foundation

Foundation: Building Foundation PowerPoint Export Templates (SCH000017)

Foundation: Introduction to Export Templates (SCH000001)

Foundation: Introduction to Matter Profiling (SCH000015)

Foundation: Virtual Training - Day 1 of 4 (SCH000002)

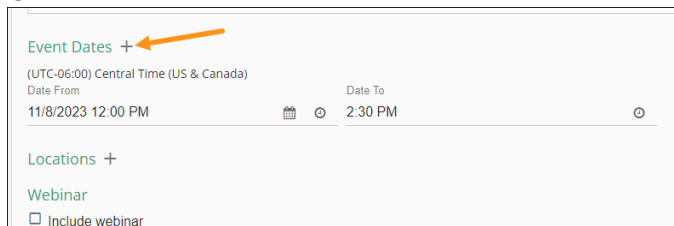
Foundation: Virtual Training - Day 2 of 4 (SCH000003)

Foundation: Virtual Training - Day 3 of 4 (SCH000004)

Foundation: Virtual Training - Day 4 of 4 (SCH000005)

SELECT CANCEL

5. Click **+** to add Event Dates.



Event Dates +

(UTC-06:00) Central Time (US & Canada)

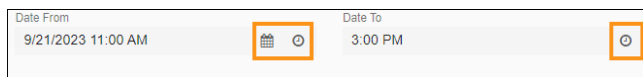
Date From 11/8/2023 12:00 PM Date To 2:30 PM

Locations +

Webinar

☐ Include webinar

6. Add the dates and times for the class.





Date From 9/21/2023 11:00 AM Date To 3:00 PM

7. Repeat step 5 to schedule more events.

Event Dates +
  
(UTC-06:00) Central Time (US & Canada)

Date From	9/21/2023 11:00 AM		Date To	3:00 PM	
Date From	10/5/2023 11:00 AM		Date To	3:00 PM	
Date From	10/26/2023 11:00 AM		Date To	3:00 PM	

8. Check box for Webinar to add webinar information.
  - a. URL – **enter the meeting URL.**
  - b. Meeting number – enter meeting number.
  - c. Password – enter password, if applicable.
  - d. Presenter Meeting Number – enter presenter meeting number, if applicable.
  - e. Presenter Password – enter presenter password, if applicable.
  - f. Audio Information – enter audio information, if applicable.
  - g. Capacity – enter the maximum capacity for the session (**required**).
  - h. Enrollment Opens – Verify or enter the date that customers can start registering for the event.
  - i. Enrollment Closes – select when enrollment closes for the event.
9. Contacts, **click +** to add the trainer for the event.
10. Type the name, then click the magnify glass.
11. Check the box for the contact, then click Select.
12. **Save.**


 Calendar


Event Dates +

(UTC-06:00) Central Time (US & Canada)

Date From


11/8/2023 12:00 PM





Date To

2:30 PM



Locations +

Webinar

☒ Include webinar

URL

Meeting Number

Password

Presenter Meeting Number


Presenter Password

Audio Information

Capacity


Enrollment Opens

11/8/2022




Enrollment Closes (Minutes)

0 minutes before event start



Contacts +

 **Trainer** Wheatley Mary (mary.wheatley@litera.com)

SAVE

CANCEL



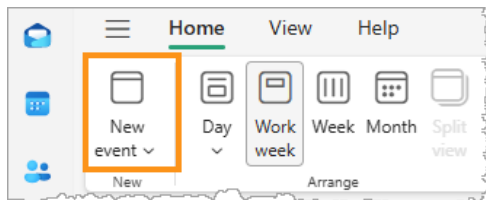
## Create Live Event Teams Meeting URL – New Outlook

Previously, we assigned the same URL to every individual Live Event on our calendar, which has led to various issues. Moving forward, it is mandatory to generate a unique link for each scheduled event.

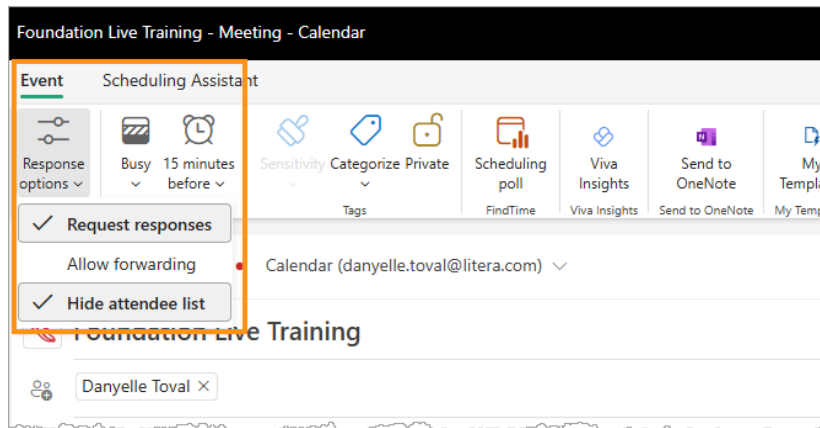
### Process Owner: Trainer

Using **New Outlook** follow the steps below to create a Teams URL:

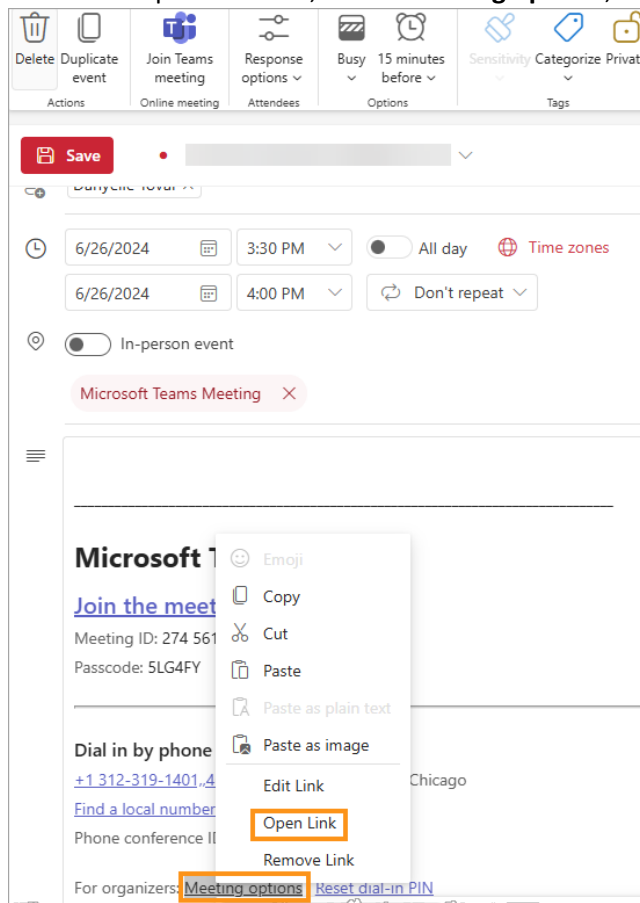
1. In Navigate to your **Outlook Calendar** to create an Online meeting invitation.
2. Click **New event**.



3. Enter the following information for these fields:
  - Add a title: **Enter the Live Event**
  - Required attendees: **Trainer name**
  - **Add the date and time** information
  - Meeting Location: Select **Teams Meeting**  
**Note:** The Teams meeting information will not populate until after you send the meeting invite
  - Response options select:
    - ✓ **Request Response**
    - ✓ **Hide attendee list**



4. Click the **Send** button to save, then reopen the event to edit the meeting options.
5. In the description section, locate **Meeting options**, then right-click on it and choose **Open Link**.



6. Select the following Meeting Options:
  - Security Tab
    - Who can bypass the lobby? **Only organizers and co-organizers**
  - Engagement Tab
    - Announce when people dialing in join or leave: **Yes**

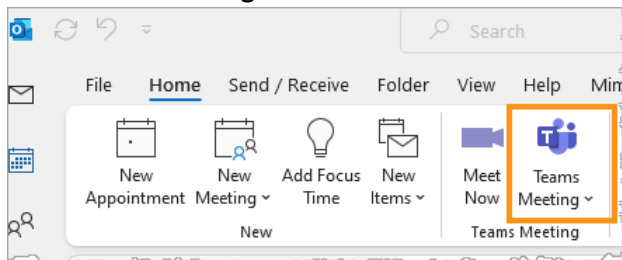
- Click the **Save** button.
- 7. Copy the **Join the Meeting now** URL, then paste it in the event you created in University.

## Create Live Event Teams Meeting URL – Old Outlook

Previously, we assigned the same URL to every individual Live Event on our calendar, which has led to various issues. Moving forward, it is mandatory to generate a unique link for each scheduled event.

### Process Owner: Trainer

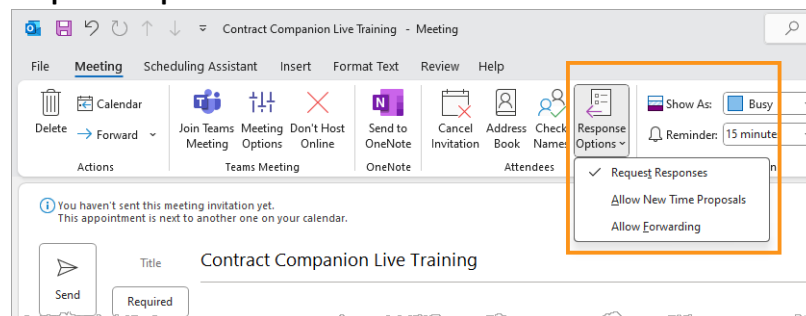
1. In Navigate to your **Outlook Calendar** to create an Online meeting invitation.
2. Click **Teams meeting**.



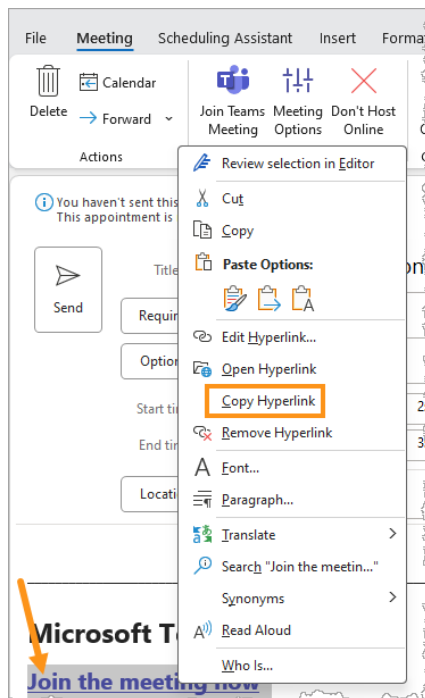
3. Enter the following information for these fields:

- Title: **Enter the Live Event**
- Required: **Trainer(s) name**
- **Add the date and time** information
- Location: **Microsoft Teams Meeting**
- Response options select:

- **Request Response**



4. Select the Meeting Option button.
  - Select the following Meeting Options:
    - Who can bypass the lobby? **Only organizers and co-organizers**
    - Check the box for **Announce when people dialing in join or leave**
    - Click **Save** to save changes.
5. Click the **Send** button to save.
6. Copy the **Join the Meeting now** URL, then paste it in the event you created in University.



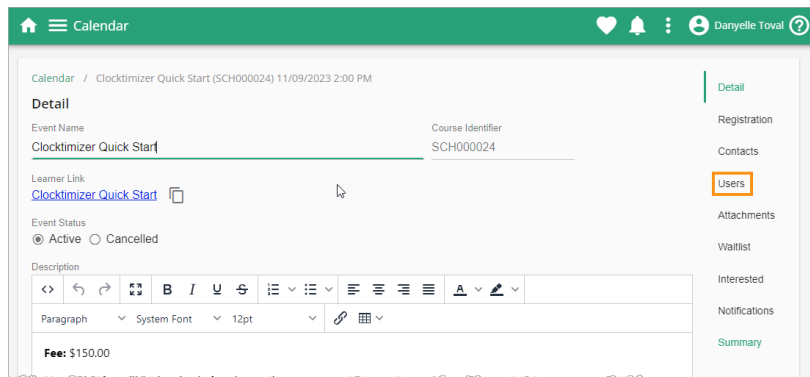
## Adding a User to Live Event

Trainers can add users to a live event. However, it is important to note that the users must already have an account in the system for them to be added.

**Process Owner:** Trainer





Follow the steps to add a user to a Live Event:

1. Navigate to the Calendar by clicking the hamburger menu ☰, then click **Calendar**.
2. Double-click on the Live Event you wish to add a user to.
3. Click on the **Users** tab.








4. Click **+** to add the User to the event.

Calendar / Clockimizer Quick Start (SCH000024) 11/9/2023 2:00 PM

Users    

User ID	User	Location	User Location
No records to display.			

    Page size: 100 

5. Press the **Select** button, type the name, then click the magnify glass.
6. Check the box for the user, then click **Select**.
7. Under the Event Status, select an option:
  - a. Enrolled – used to enroll the contact in a future session.
  - b. Finished – used to enroll, then mark the contact as finished with a past session.
  - c. Waived, Passed, and Failed – these statuses are not currently in use.
8. Press the **Save** button.