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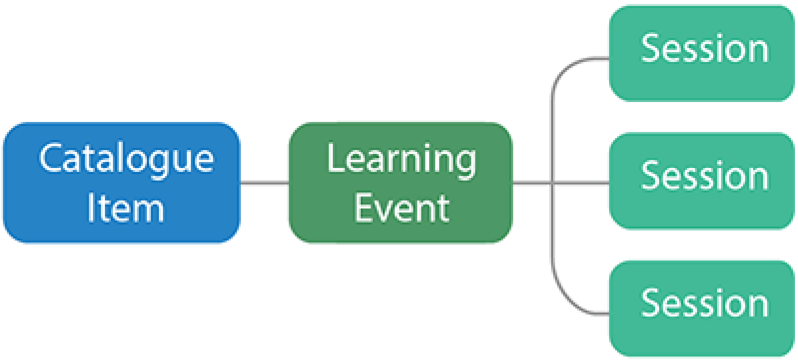
Managing Sessions – Introduction

There are a number of different types of Learning Assets in the CLS. All Learning Assets need to be linked to a Catalogue Item in order for learners to enrol or be enrolled in them. The type of Learning Asset described here is the **Learning Event**.

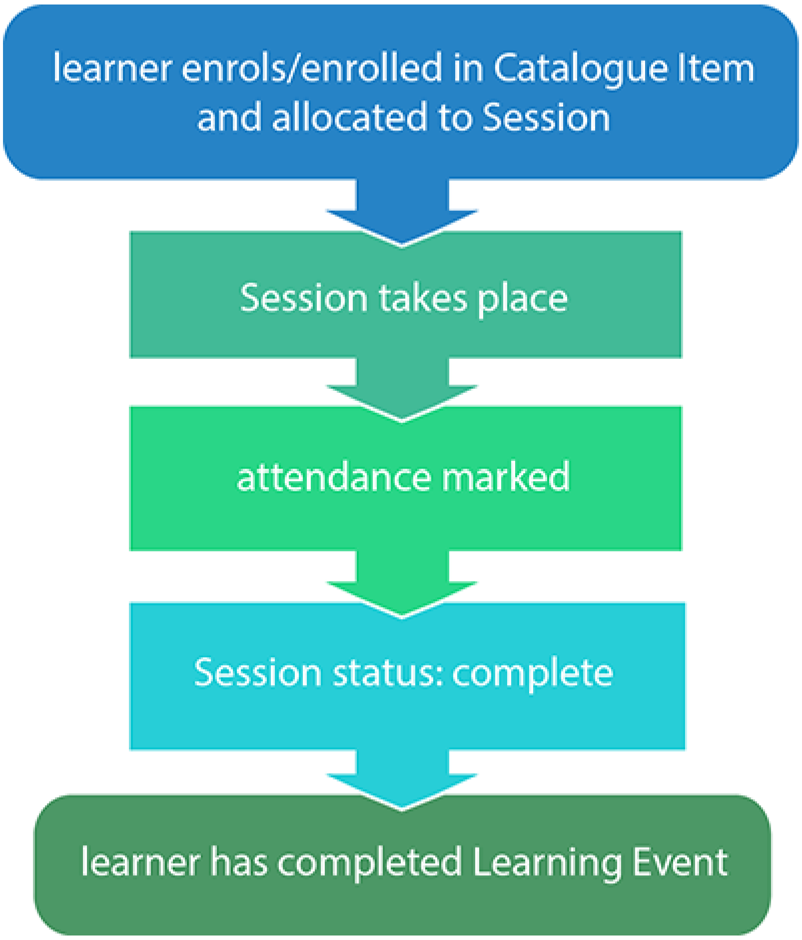
A Learning Event is training that takes place when a learner User actually attends a venue, including a virtual venue (webinar). In the CLS, such training is called a Learning Event and there are a number of kinds of such events:

- Face to face
- Conference
- Informal Session
- Lecture
- Mentoring
- Webinar
- Workshop

A Learning Event is defined as one of these kinds of event and it is made up of one or more Sessions. It is the **Session** that a learner User attends and it has a date, location, capacity, facilitator, specific instructions, etc. These details can change from Session to Session within one Learning Event.



In general, the process for the learner User is:



However, the first step can take place in a number of ways, depending on:

- Catalogue Item enrolment settings (which in turn depends on **Settings** >**Enrolment** in the CLS)
- Learning Event enrolment settings
- Capacity of a Session, i.e. how many people can attend it

When a learner User goes to Browse Learning and clicks the Catalogue Item containing the Learning Event, they see a list of all the Sessions and their details, including whether they've reached capacity (are full).

After this, different things happen depending on the interaction of the following settings:

	Catalogue Item doesn't allow self-enrol	**Catalogue Item allows self-enrol (free)**
Learning Event doesn't allow learner Users to	Learner is enrolled in Catalogue Item (various methods) • learner joins the Waitlist for	Learner can: 1. click **Attend Session** to join an available Session, or

	Catalogue Item doesn't allow self-enrol	Catalogue Item allows self-enrol (free)
register interest	the Learning Event • Event Facilitator allocates learner to individual Session	2. click **Join Session Waitlist/Leave waitlist to join/leave Waitlist** for a Session that is full After either option the learner is enrolled and sees a response confirming their Session choice
Learning Event set to • **Allow users to register interest** and • **Add interested users to the event waitlist**	Learner can click **Register Interest**; will be enrolled and receive notification when new Sessions become available • learner joins the Event Waitlist • Event Facilitator allocates learner to individual Session	Learner can do the two things above plus 3. click **Register Interest**: learner receives notification when new Sessions become available Learner is enrolled and joins Event Waitlist. Event Facilitator allocates learner to individual Session or learner does so after email notification

Learner Users are notified that they have been added to a Session or a Waitlist through the CLS and using the Message Templates. Note that if the Catalogue Item's self-enrolment method requires approval, then the column on the right will also include the approvals process specified, see **Self-Enrolment Settings**.

A Learning Event can consist of:

- a single Session
- multiple Sessions
- multiple Sessions in various locations

A User enrols in one Session in a Learning Event. If a Session runs over more than one day Users are required to attend all of this time in order to complete the Session. However, one Session cannot, for example, run just in the morning for several days. If this format is required then a separate Event should be created for each morning Session so that Users can enrol in each morning Session.

Sessions are added after the creation of a Learning Event. Each Session has its own summary page in the CLS. This includes detailed instructions for Learners, a map and possibly files for them to download. When a Session is edited there is also an option to inform its attendees of the change.

A Learning Event without Sessions can be used for registering interest or waitlisting Users, with the possibility of creating Sessions later when the training and/or interest is confirmed. A Learning Event with Sessions can be used to auto enrol Users via workflows or as above for registering interest and waitlisting Users.

There are a number of different roles in the whole process and they can be done by the same or different people. They are:

- enrolling learners in an Event (if necessary)
- facilitating the Event
- facilitating particular Sessions
- marking attendance
- awarding Competencies

The User Extra Role Event Facilitator manages and administers Learning Events and has access to Mark Session, Manage Session and Learning Event Session details. Thus, these people can add attendees to each Session and also remove them from Sessions.

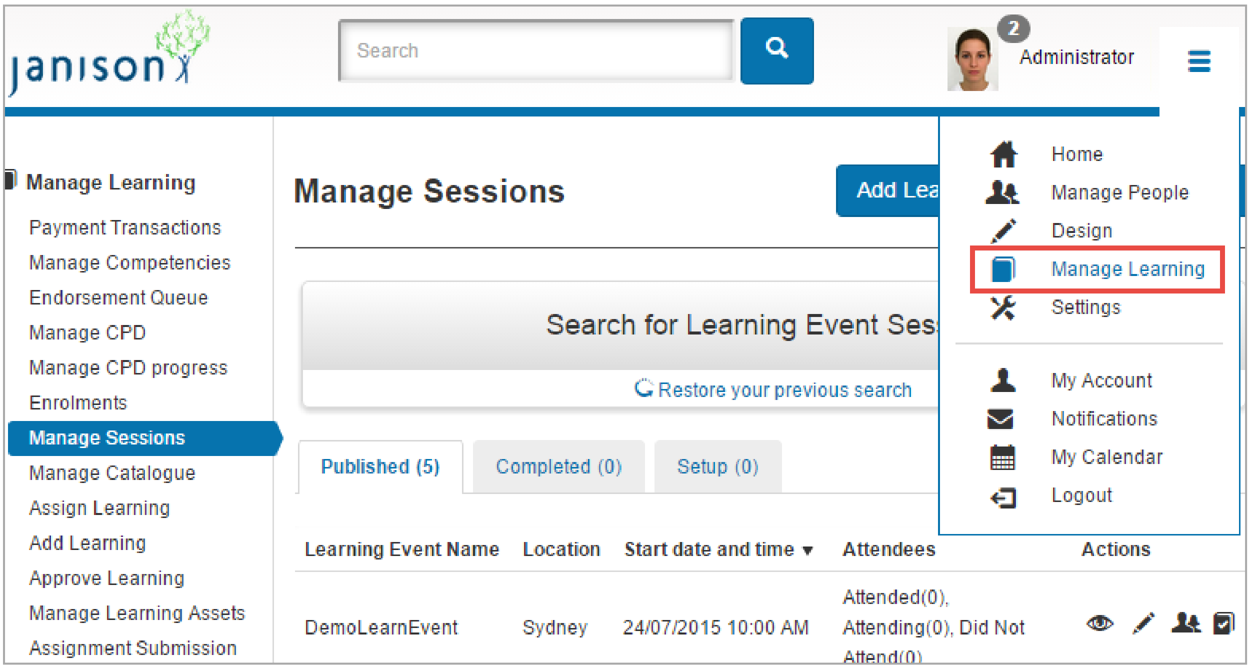
You create and edit Learning Events in the **Manage Learning** > **Manage Learning Assets** section of the CLS. Once a Learning Event has been created, you add and edit its Sessions in the same location.

You manage (e.g. allocating attendees to Sessions) and mark Sessions through **Manage Learning** > **Manage Sessions**, which also provides links for the creation of Learning Events and the creation and editing of Sessions.

Note that you can also create Learning Events and Sessions through **Manage Learning** > **Add Learning**, which is a setup assistant that also creates a Catalogue Item so that Users can be enrolled.

Manage Sessions

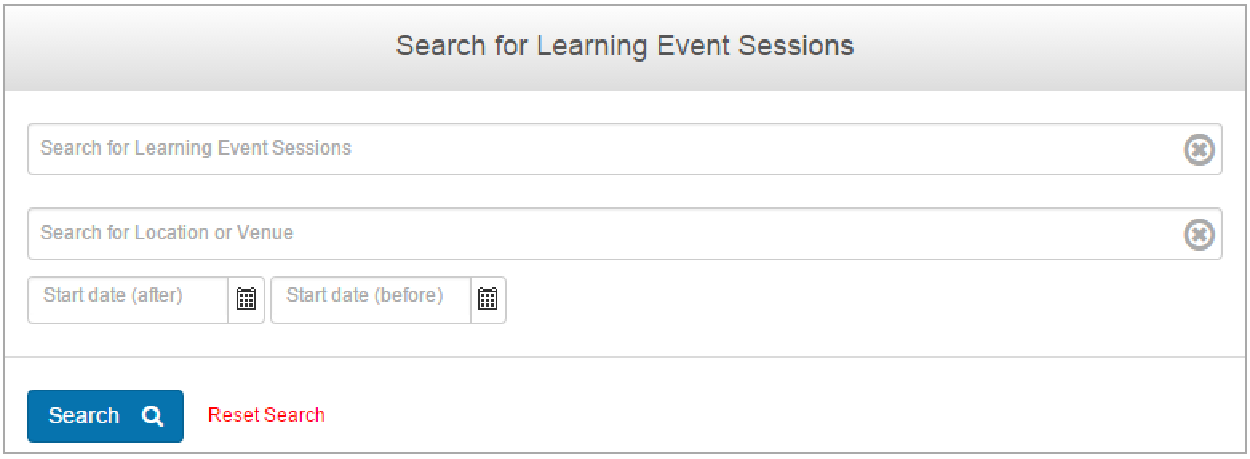
To manage and mark Sessions select **Manage Learning** > **Manage Sessions**



The screen shows a list of all Sessions, divided into three categories (Published, Completed and Setup), the Learning Event name and location, times and attendee numbers for each Session are listed.

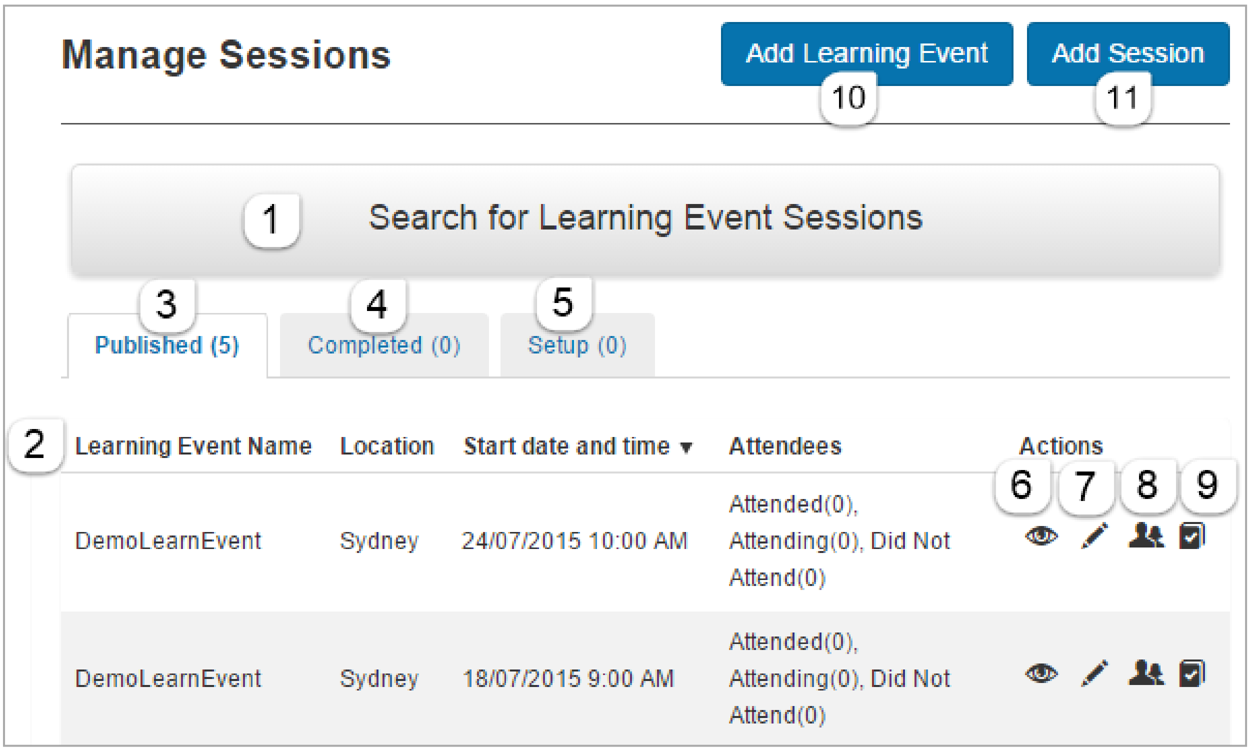
The main aspects of the page are:

1. Click **Search for Learning Events Sessions** to display the search function where you can enter search terms including Session names, Locations and Start dates. Click **Search**



2. Note that each heading name can also be clicked to sort the list in ascending and descending orders according to that value
3. **Published** – This tab holds all Sessions that have been published into the Catalogue
4. **Completed** – This tab holds all Sessions that have been closed off by the administrator at the end of marking

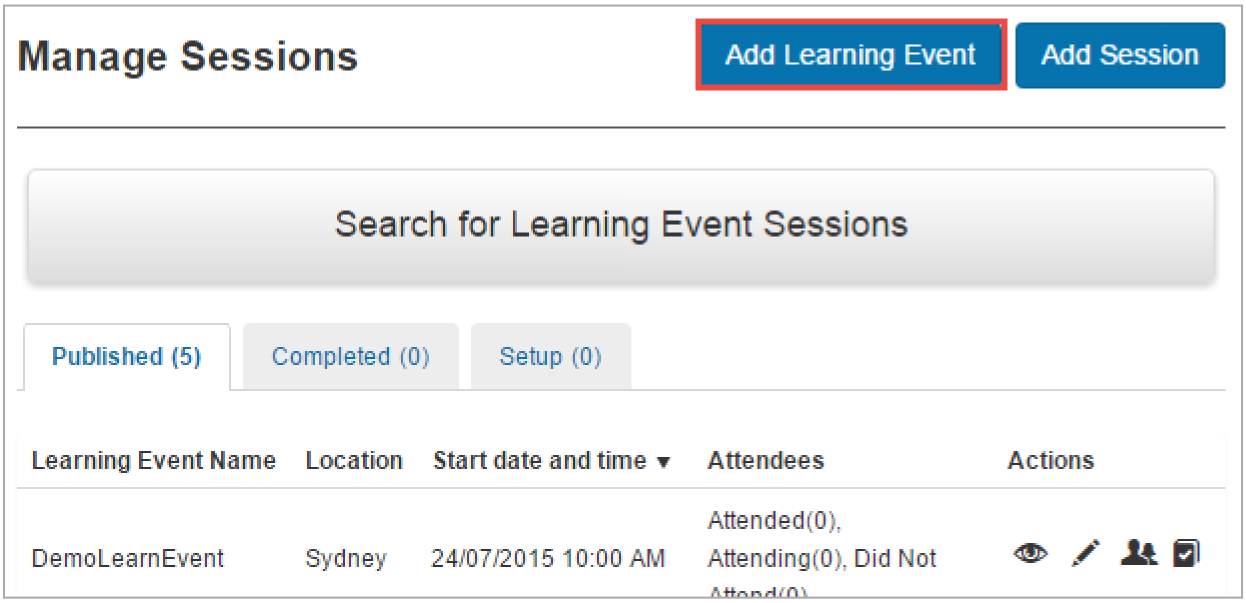
5. **Setup** – This tab holds all Sessions that are still in setup mode i.e. they have not been published to the Catalogue
6. Click the **eye** icon to inspect this Session in **Manage Learning Assets**.
7. Click the **pencil** icon to edit this Session in **Manage Learning Assets**.
8. Click the **people** icon to manage this Session and move Users to and from waiting lists.
9. Click the **tick** icon to mark the Users enrolled for this Session.
10. Click **Add Learning Event** to add a new Learning Event in **Manage Learning Assets**.
11. Click **Add Session** to add a new Session in **Manage Learning Assets**.



Add Learning Event

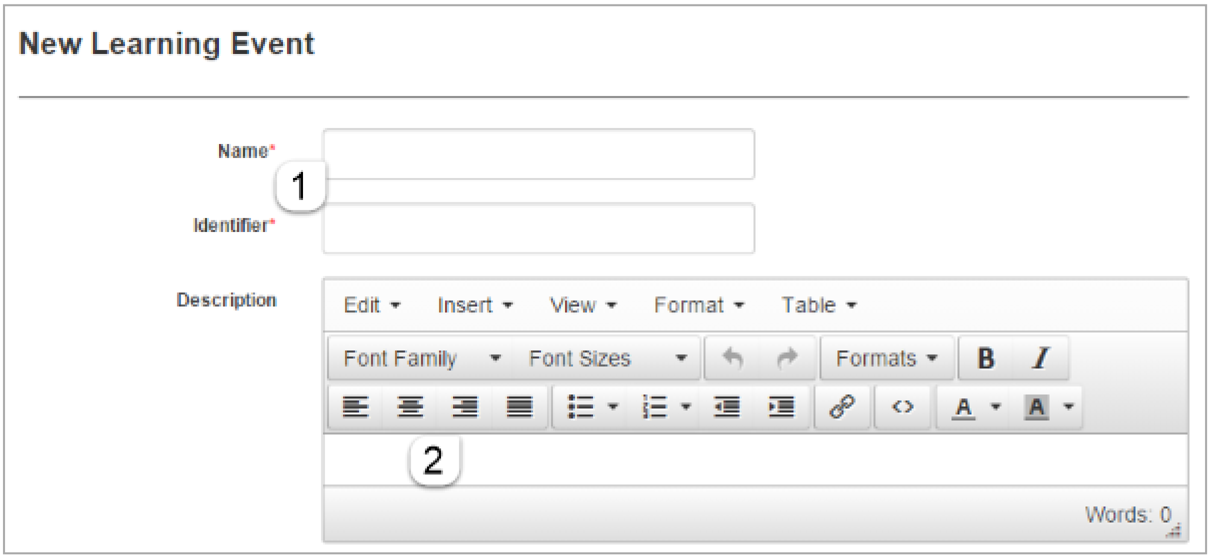
To add a Learning Event in Manage Sessions, select **Manage Learning >Manage Sessions**.

Select **Add Learning Event**.



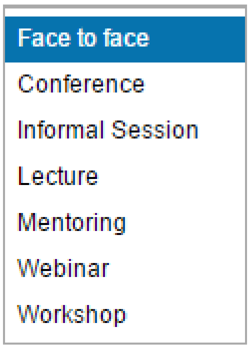
You are then taken to the **Manage Learning Assets** section of the CLS to create a new Learning Event.

1. Enter a **Name** and **Identifier** for the Learning Event.
2. Enter a **Description** if desired.

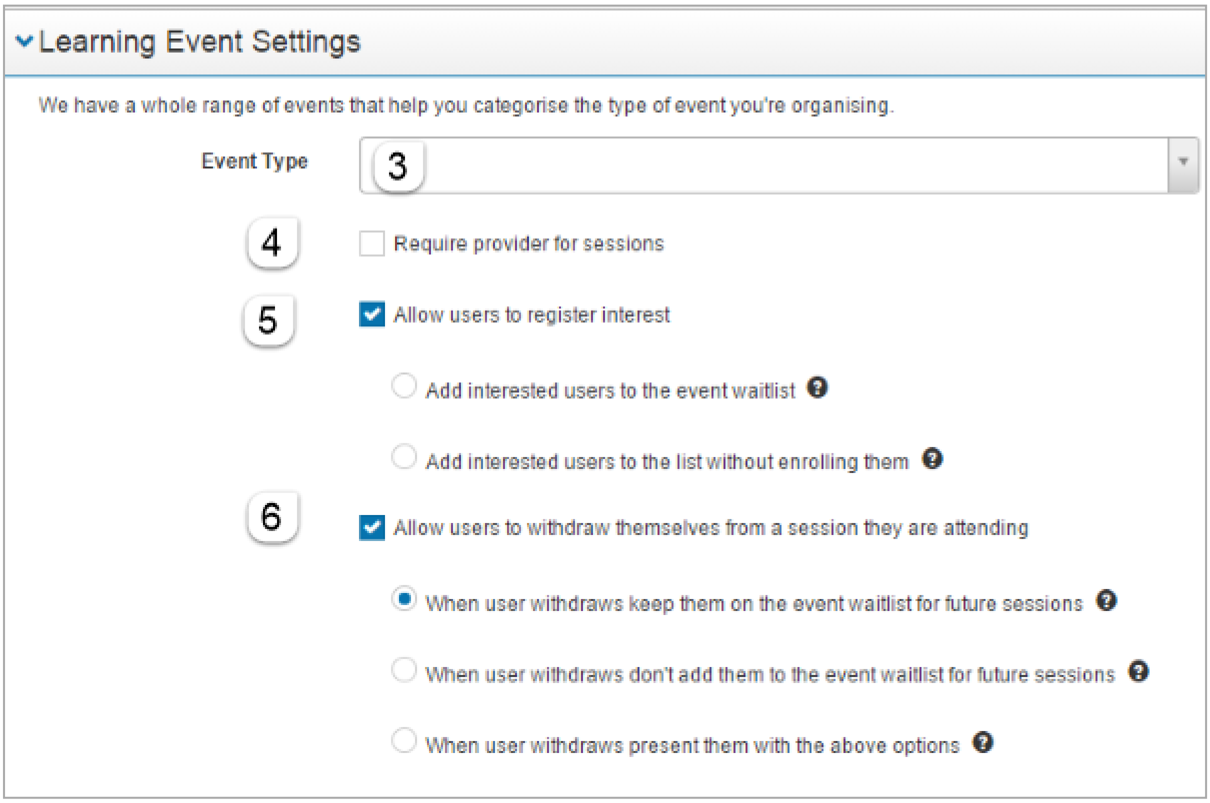


Click the chevron next to **Learning Event Settings** to open the window

3. Select the **Type** of Learning Event from the drop-down box.



4. Click this box if provider details must be entered for all Sessions.



5. If you click the box next to **Allow users to register interest** two new checkboxes appear and you must select one of them. The second option accommodates the less common situation where you want to gauge User interest but **not** enrol them.

- **Add interested users to the event waitlist:**

This will enrol Users in the Learning Event and put them into the event waiting list. Session management screens show this waiting list and Users can be moved from the list and into Sessions.

- **Add interested users to the list without enrolling them:**

This will NOT enrol Users in the Learning Event. Instead it will put them on the list of Users that have registered interest in the event, which is seen at the bottom of the Learning Event inspection screen:

Because the Users are not enrolled, the list is not visible in Manage Sessions and there is no option to move these Users into a Session. They can however remove themselves from the Registered Interest list.

Warning: Choose the second option if you only want to gauge User interest in the event for reporting and notification purposes. This option would frustrate Users who do want to enrol and participate because enrolment in the event does not happen.

6. If you click the box next to **Allow users to withdraw themselves from a session they are attending** three new checkboxes appear and you must select one of them:

- **When user withdraws keep them on the event waitlist for future sessions:**

This allows the User to withdraw from the Session s/he is currently attending. S/he is put on the event waitlist so that s/he can be considered for other Sessions

- **When user withdraws don't add them to the event waitlist for future sessions:**

When the User withdraws s/he will not be added to the event waitlist and the enrolment is cancelled. However, if the User has enrolled in a Program rather than a Catalogue Item, i.e there are other Learning Asset components involved in the enrolment, then the enrolment will not be cancelled.

- **When user withdraws present them with the above options:**

This allows the User to decide if s/he is added to the event waitliust or not.

7. Click the chevron next to **Who is facilitating this event?** Click and select a name from the drop-down box and click the plus icon. You can do this multiple times. You remove a name from the list by clicking the red minus icon at its right.

Note that facilitating an Event is different to facilitating a Session as this person can add/remove attendees to/from *every* Session.

8. Session details are empty when you create a learning Event. When you come back and edit the event you can enter them.

9. Click the chevron next to **Competencies** if desired. Two checkboxes appear and you must select one of them:

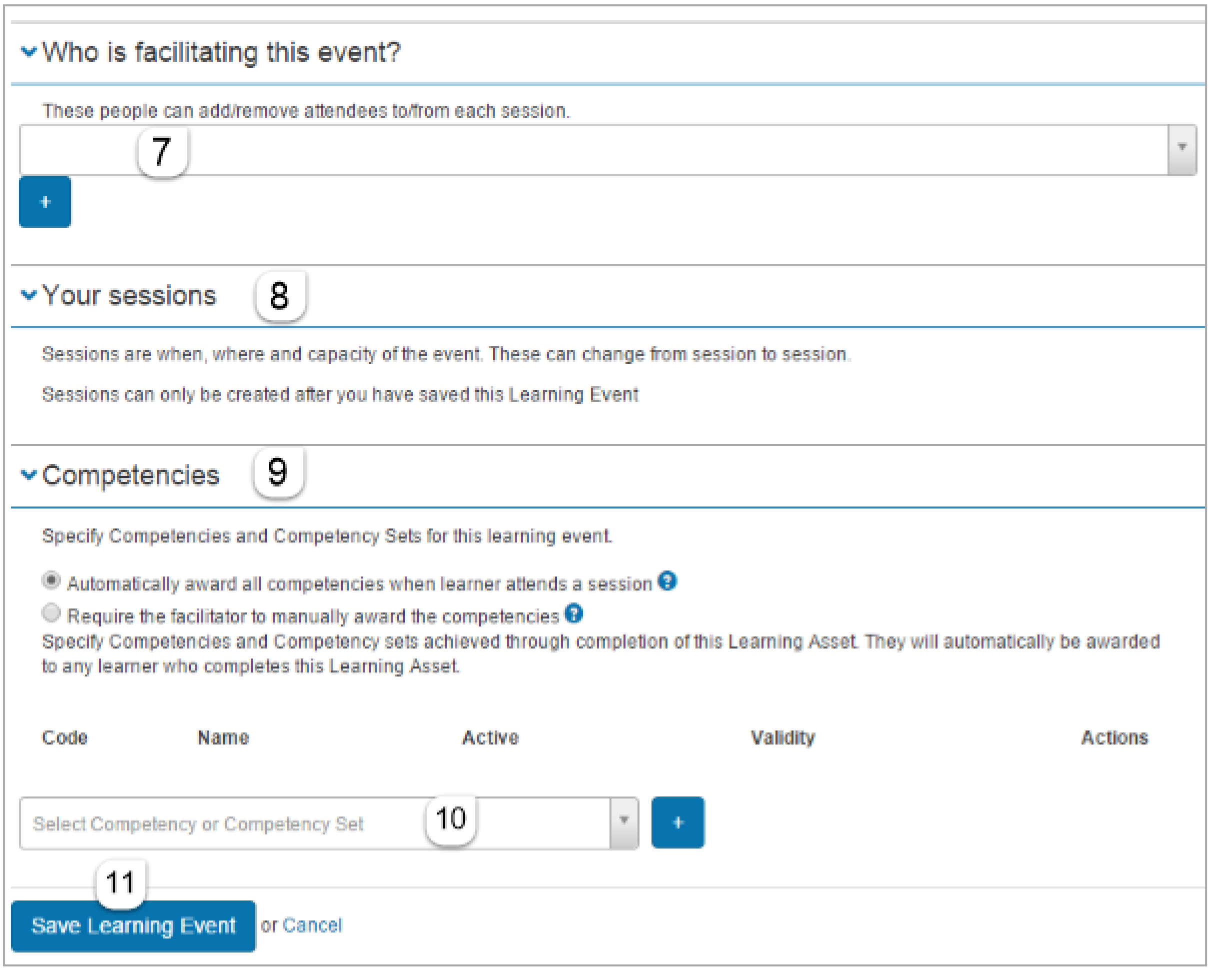
- **Automatically award all competencies when learner attends a session:**

Choosing this option means that learners will automatically be awarded all Competencies/Competency Sets when the facilitator marks them as having attended the Session successfully.

- **Require the facilitator to manually award the competencies:**

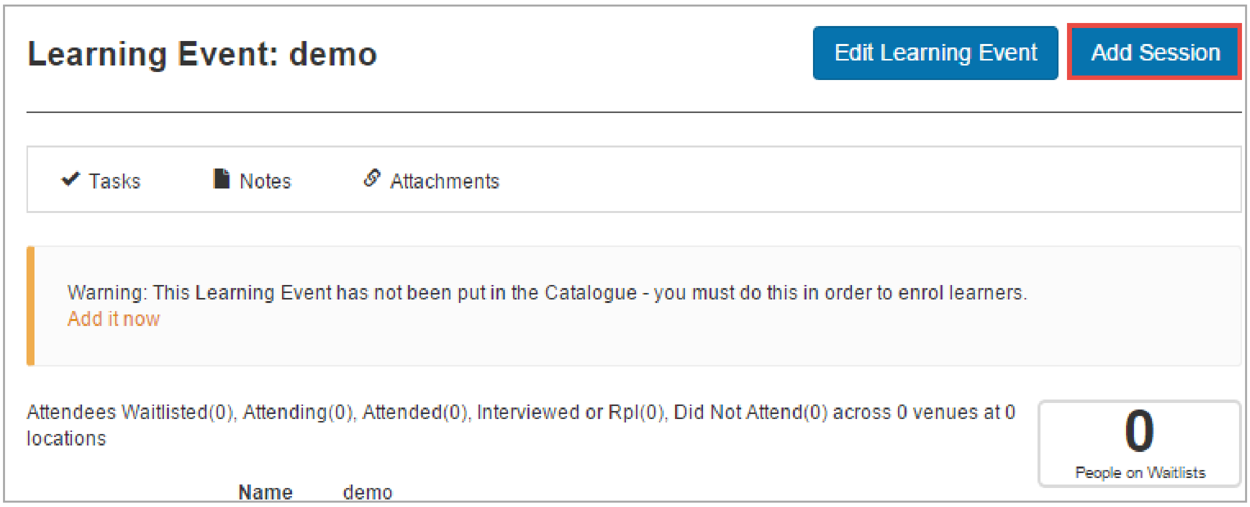
Choosing this option means that the facilitator will be required to select each of the Competencies and Competency Sets that the learner demonstrated during the session.

10. Click and select a Competency or Competency Set from the drop-down box and click the plus icon. You can do this multiple times. You remove an entry from the list by clicking the red minus icon at its right



11. **Click Save Learning Event.**

This takes you to the Learning Event inspection screen where you can click **Add Session** if you want to add the Session details at this time.

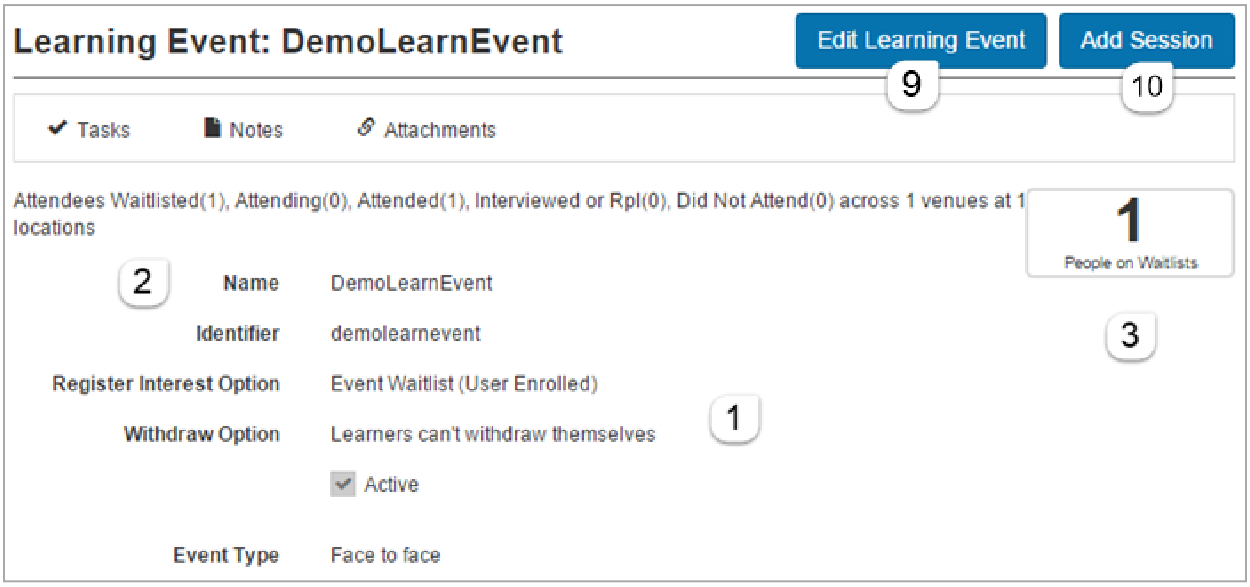


Inspect Learning Event

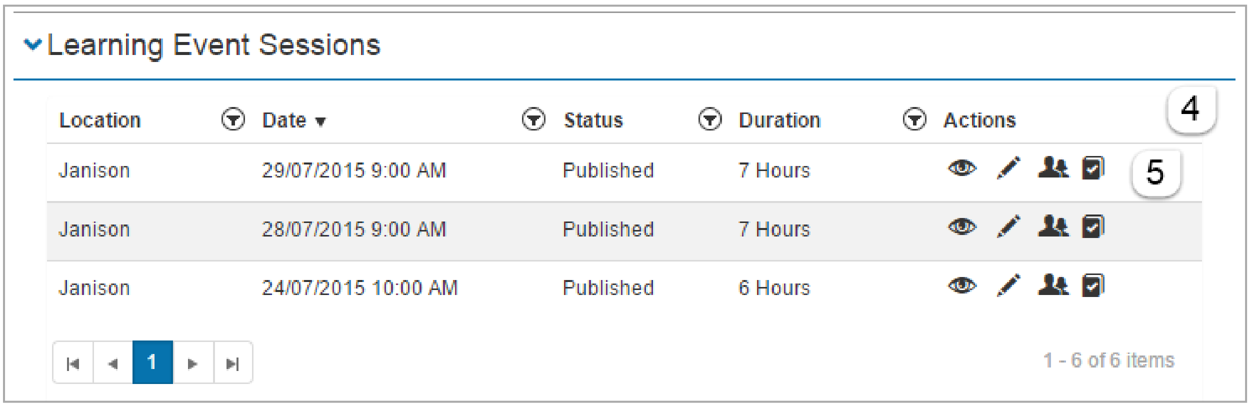
You can inspect a Learning Event from **Manage Sessions** via the hyperlink to the event that is at the top of the Manage a Session and Mark a Session screens.

You are then taken to the **Manage Learning Assets** section of the CLS to inspect the Learning Event.

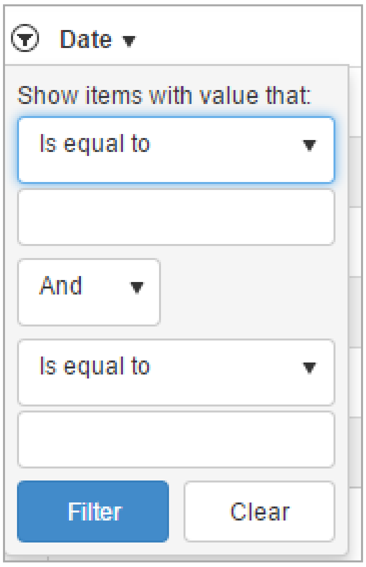
1. The primary characteristics of the Learning Event are listed here including options chosen when it was created and whether it is active.
2. The number of attendees in each of these categories is listed: *Waitlisted, Attending, Attended, Interviewed, have RPL, Did not attend.*
3. The number of People on Waitlists is displayed prominently.



Click the chevron next to **Learning Event Sessions** to view a list of the linked Sessions.



4. The headings at the top can be used to search the list. Click the triangle icon to specify search terms using the heading value, e.g the date of the Session and display the results



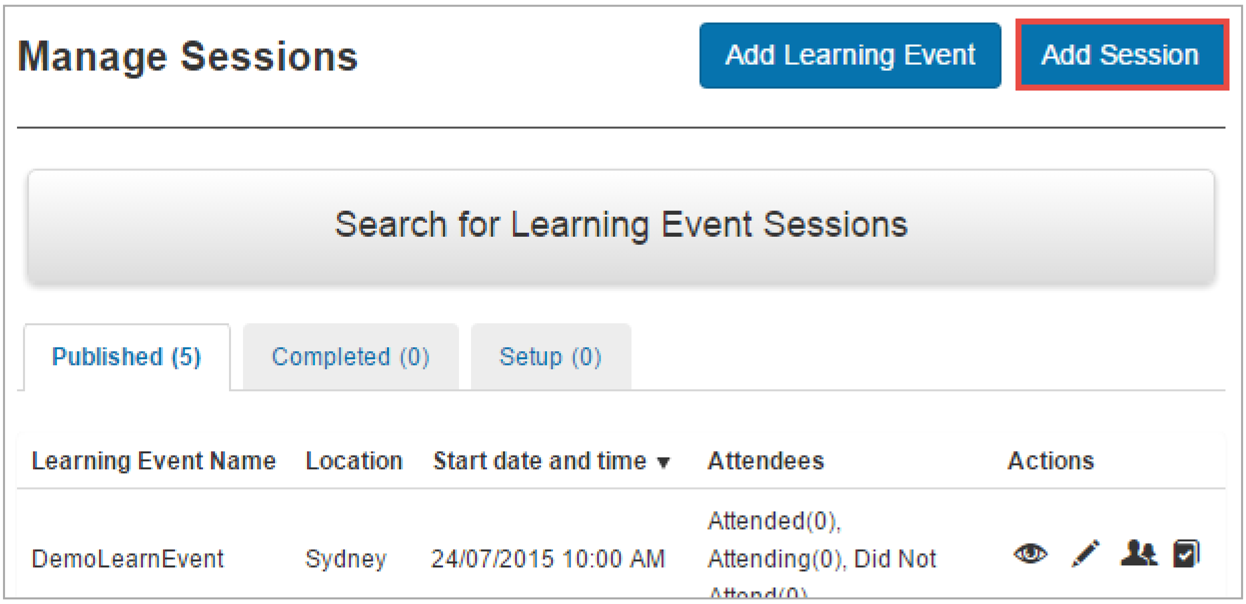
5. Each Session can be viewed, edited, managed or marked by clicking the appropriate icon at its left.
6. Click the chevron next to **Competencies** to view any Competencies attached to this Learning Event and whether they are awarded automatically, see Add Learning Event for details of the options.
7. Click the chevron next to **Users who have registered interest** to view the list of Users who have registered interest but are not enrolled, see Add Learning Event for details of the options.
8. Click the chevron next to **Recent activities** if desired

9. To edit this Learning Event click **Edit Learning Event** at the top of the screen.
10. Click **Add Session** at the top of the screen to add a Session to this Learning Event.

Add Session

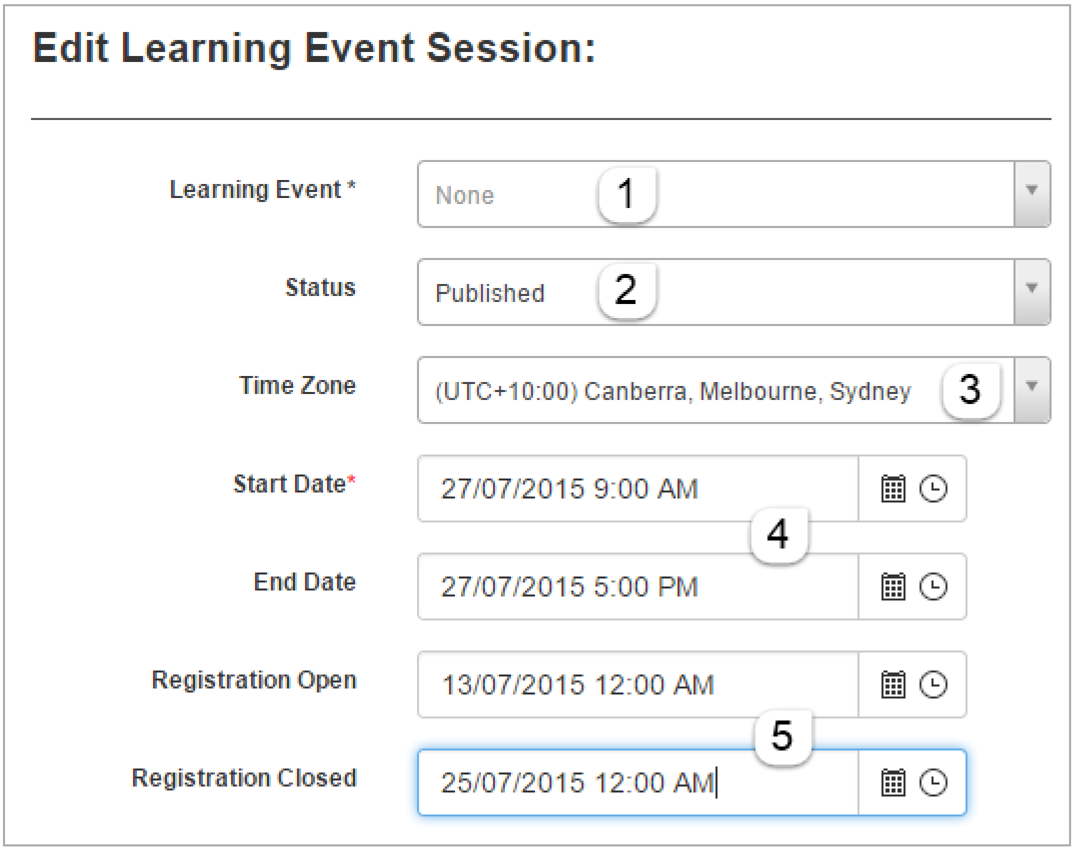
To add a Session in Manage Sessions, select **Manage Learning** >**Manage Sessions**.

Click the **Add Session**.

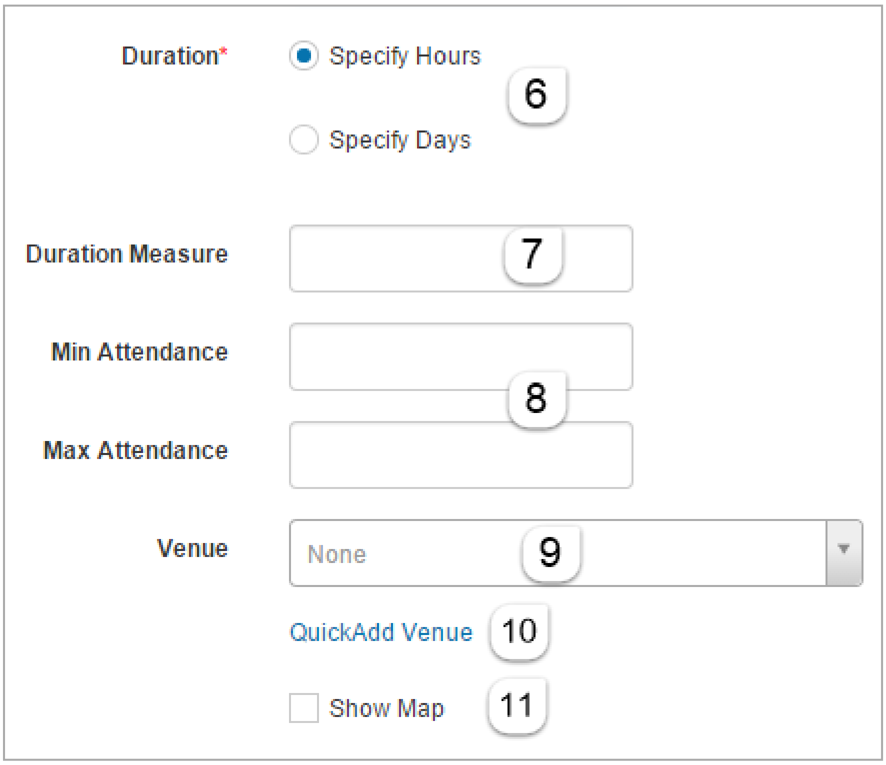


You are then taken to the **Manage Learning Assets** section of the CLS to create a new Session. Note that you must create the Learning Event before you create its Sessions.

1. Click and select a **Learning Event** for this Session.
2. Select a **Status**
    - Setup - not published to the Catalogue.
    - Published - published into the Catalogue.
    - Archived.
    - Completed – all attendees have been marked and the Session is completed.
    - Cancelled.
3. Click and select the appropriate **time zone**.
4. Use the date and time pickers to set **Start** and **End** dates and times.
5. Use the date and time pickers to set **Registration Open** and **Close** dates and times.



6. Select Hours or Days as the **duration** unit
7. Enter the **duration** using these units
8. Set the minimum and maximum **attendance**
9. Click and select a venue, or
10. Click **QuickAdd Venue** to add new one that you can select in 9. See notes for more information.
11. Click the checkbox to show a map



12. To include attachments use the **Upload Files** feature.

    Click **Select Files** one or more times to include attachments. You can remove a file using the little cross icon on the right hand side.

Note that because of the danger of overwhelming an email system, these attachments are not sent directly to attendees. Instead, they receive a link in their email/iCAL appointment that allows them to view the attachments in the Session Summary screen in the CLS.

13. Click the box and select a name then click the Plus icon to add **Session facilitator(s**). You can do this multiple times. You can remove a name using the big minus icon on the right hand side.
14. You can provide extra information about particular Sessions using the rich text editor. Users who are not attending will not see these instructions.

This extra information will be provided to attendees in two ways:

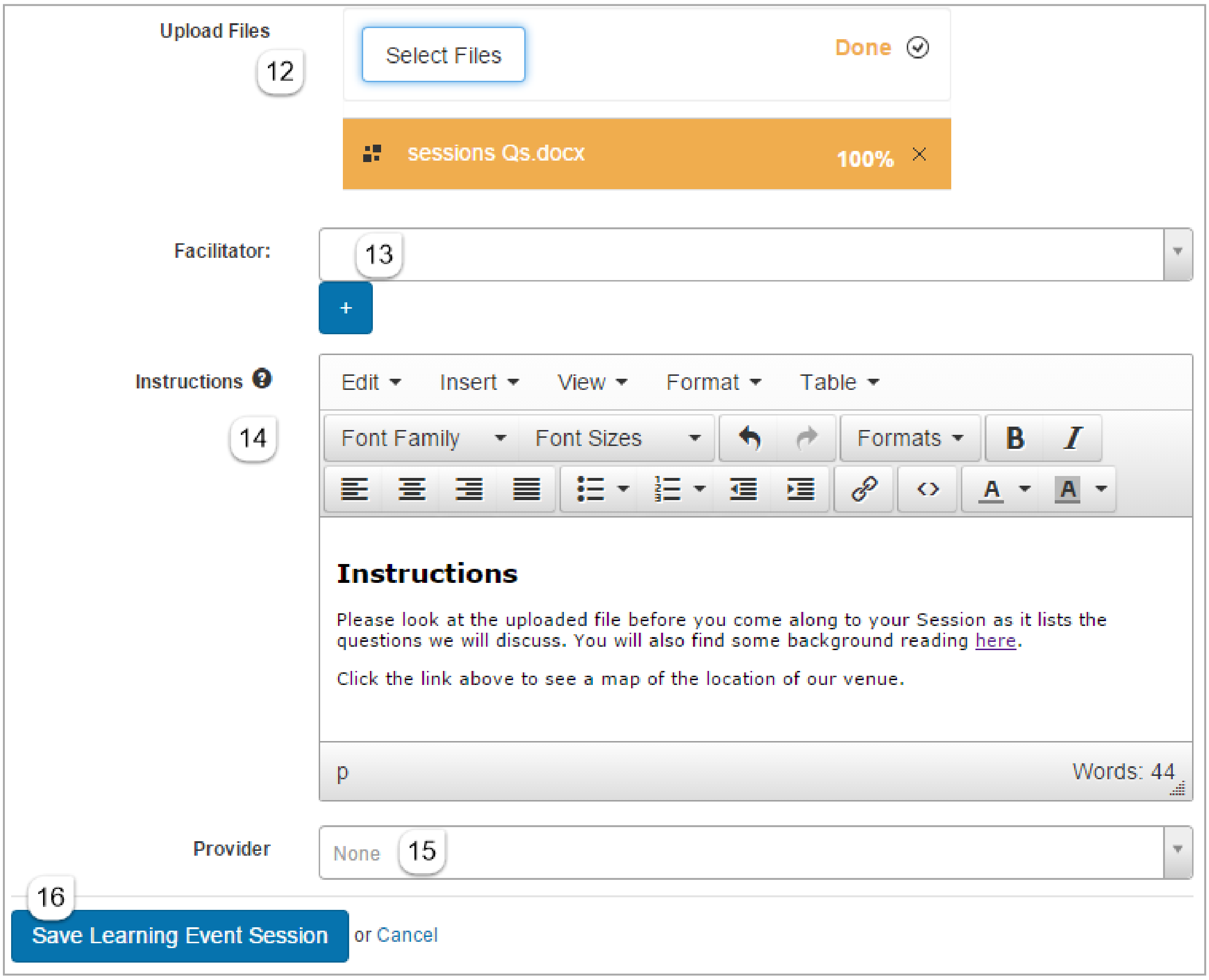
- In the CLS, on the Session Summary screen.
- In the iCAL email that is sent by the CLS to all attendees when they are enrolled in a Session.

Note that to include an email address as a link, use the insert hyperlink feature and for the URL type **mailto:admin@email.com** (where admin@email.com is replaced by the email address you want to use.

15. Providers are set at the Catalogue Item level. However, sometimes a single Learning Event is provided by different organisations. In this case, you can enter a Provider for each Session. You can then use Customisable Reports to report on a Learning Event's Session Providers and number of attendees, etc.

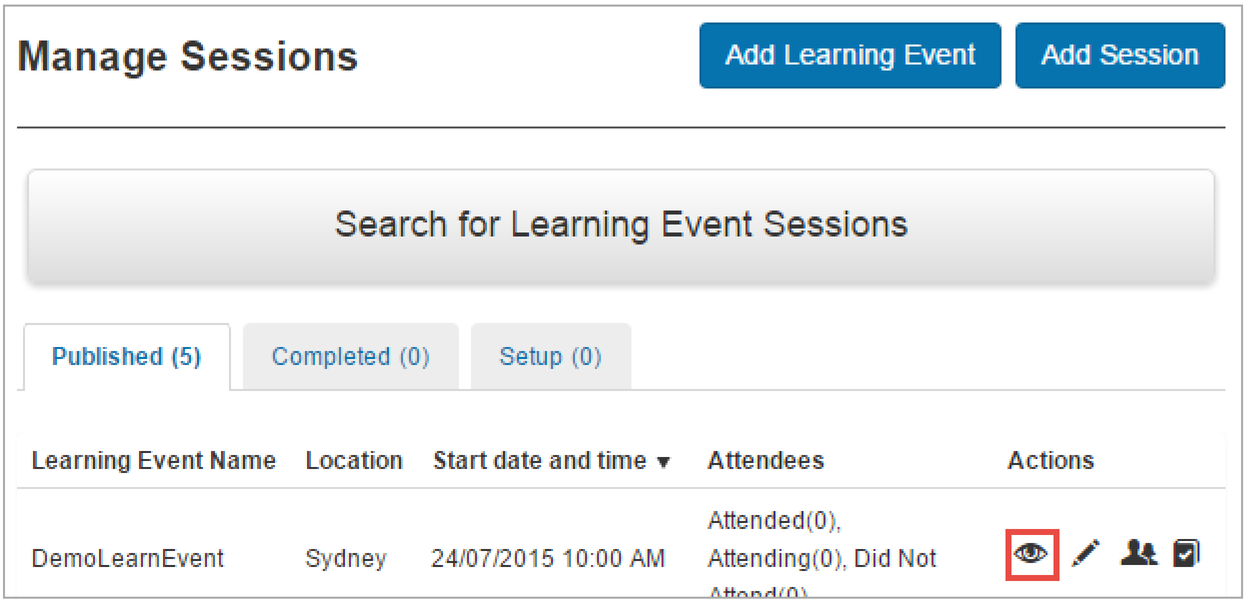
Note that you can require that all Sessions require a specified Provider by setting this for the Learning Event itself.

16. Click **Save Learning Event Session**

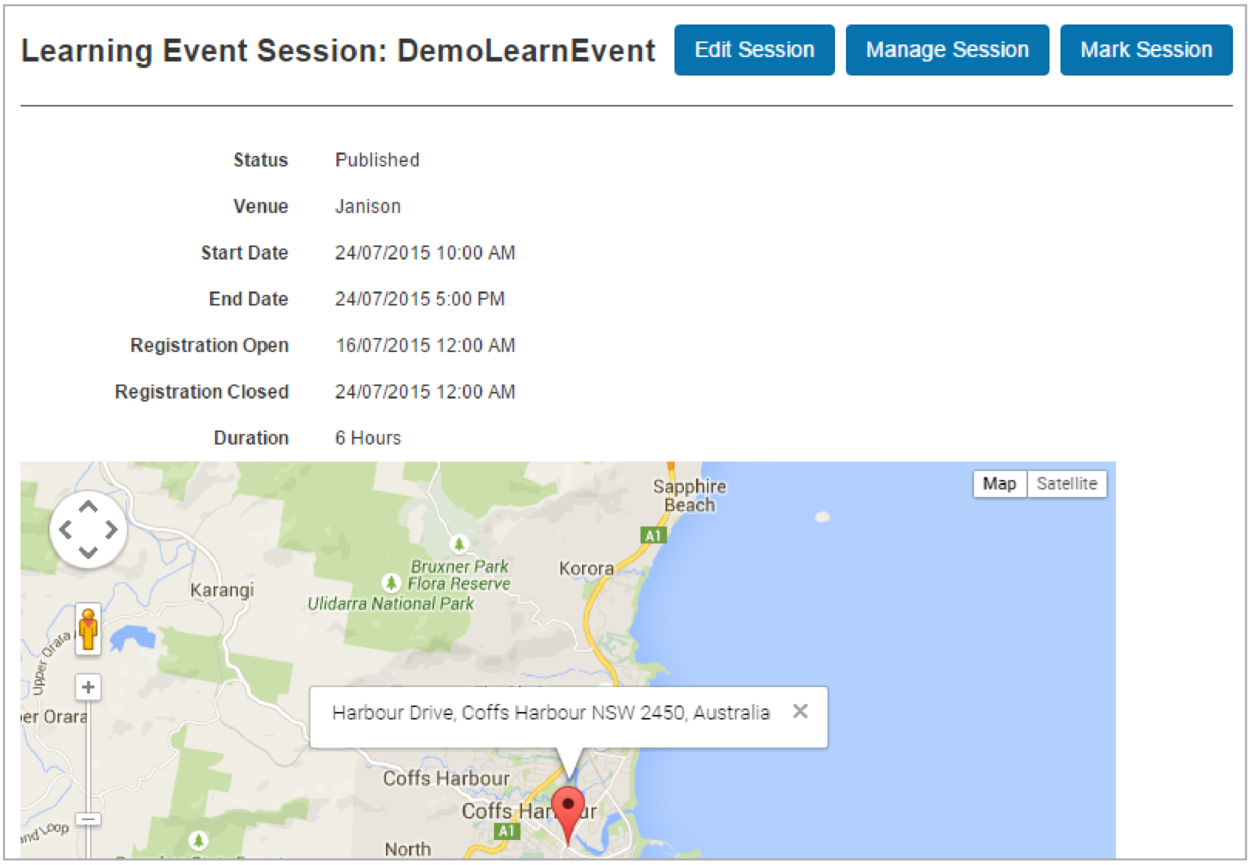


View Session

To view a Session select **Manage Learning** > **Manage Sessions**. Locate the desired Session and click the eye view icon.



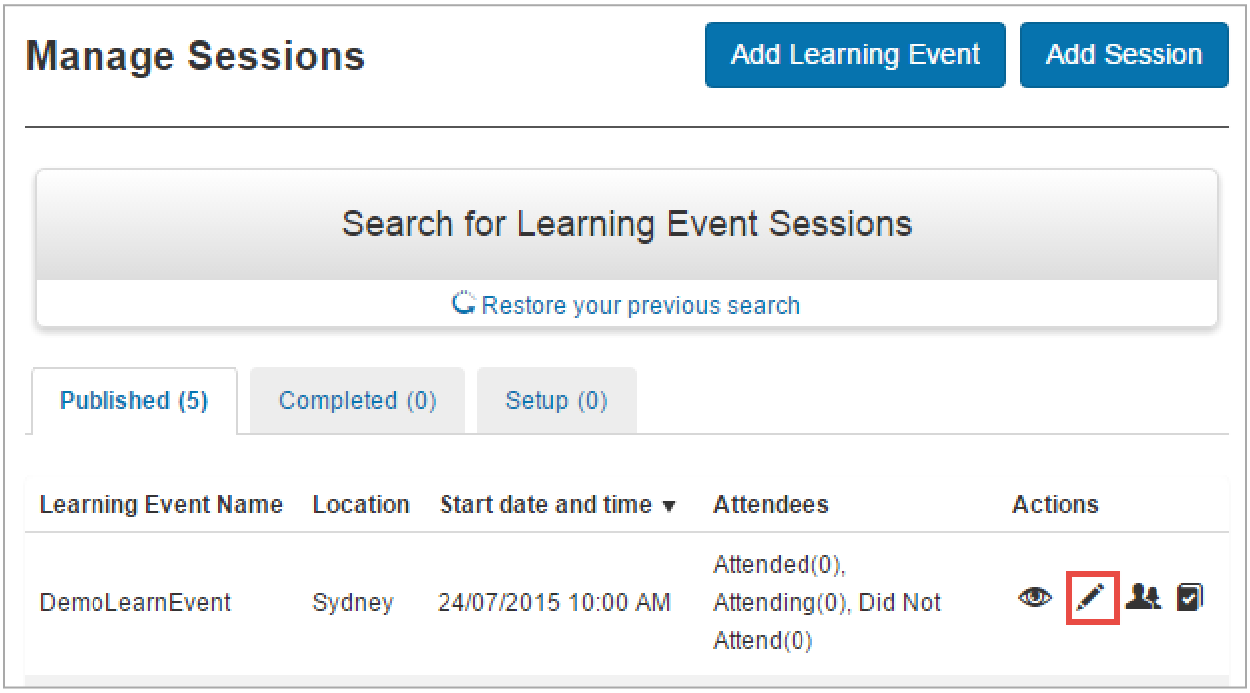
You are taken to a screen with basic information about the Session and links to the important functions that you need for editing, managing and marking it.



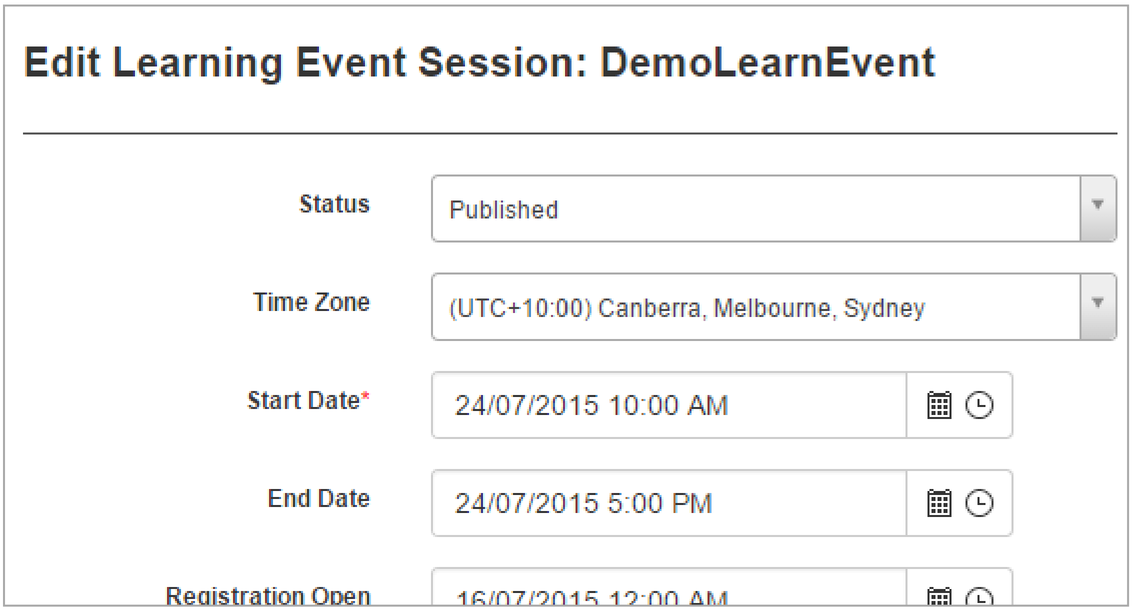
Edit a Session

You may need to edit a Session after you have created it, for example, to change its location or to change its Status to ‘Cancelled’. Note that if you need to modify the marks in a completed Session, you first need to edit it and change its status to 'Published'.

To edit a Session, select **Manage Learning** > **Manage Sessions**. Click the **pencil icon** next to the Session that you want to edit



This takes you to the edit screen for that Session in **Manage Learning Assets** where you can edit the fields discussed in [Add Session](#).



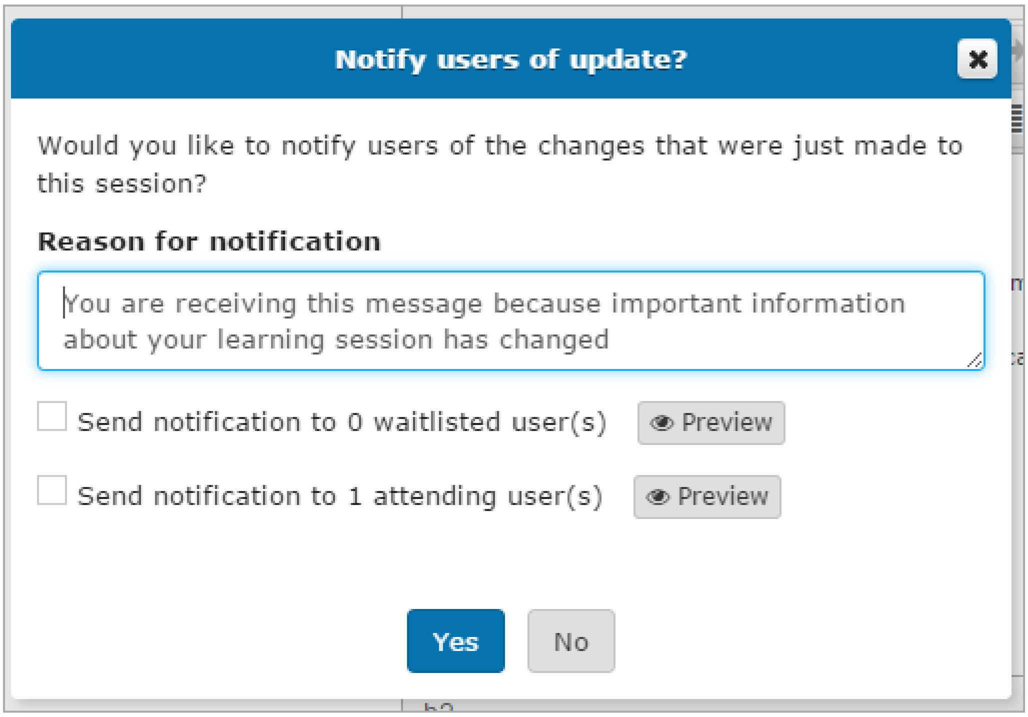
Resending information to your attendees

Note that when you make changes to a Learning Event Session, you can choose to resend the email and calendar appointment to your attendees to notify them of the change.

When you change any of the following and click **Save** you will be offered the option to re-notify all your attendees:

- The dates,
- The times,
- The venue,
- The information text, or
- The attachments.

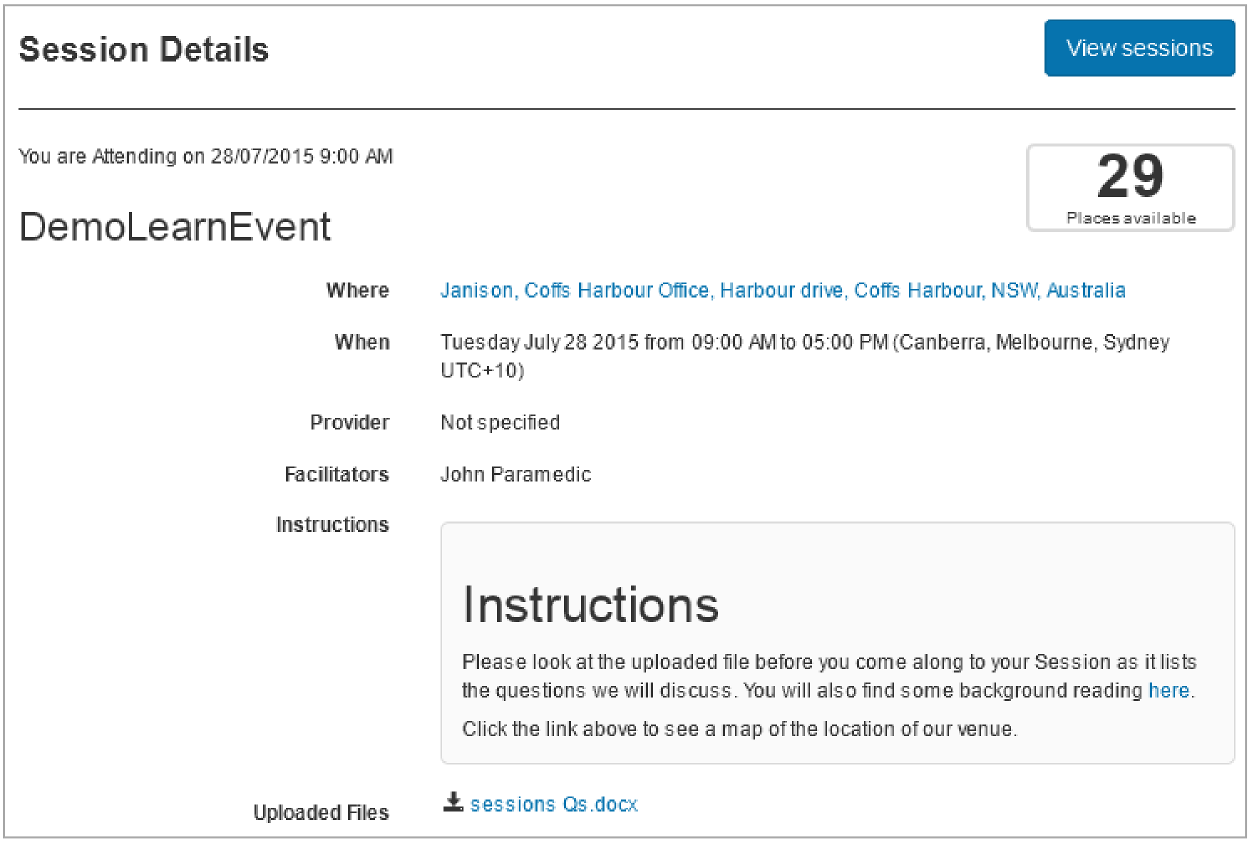
If you say **yes**, attendees will receive a replacement calendar appointment via email containing the new information.



You also have the option of informing waitlisted Users by ticking the first check box.

Session summary screen

Each Learning Event Session has its own summary page that learners can view in the CLS.



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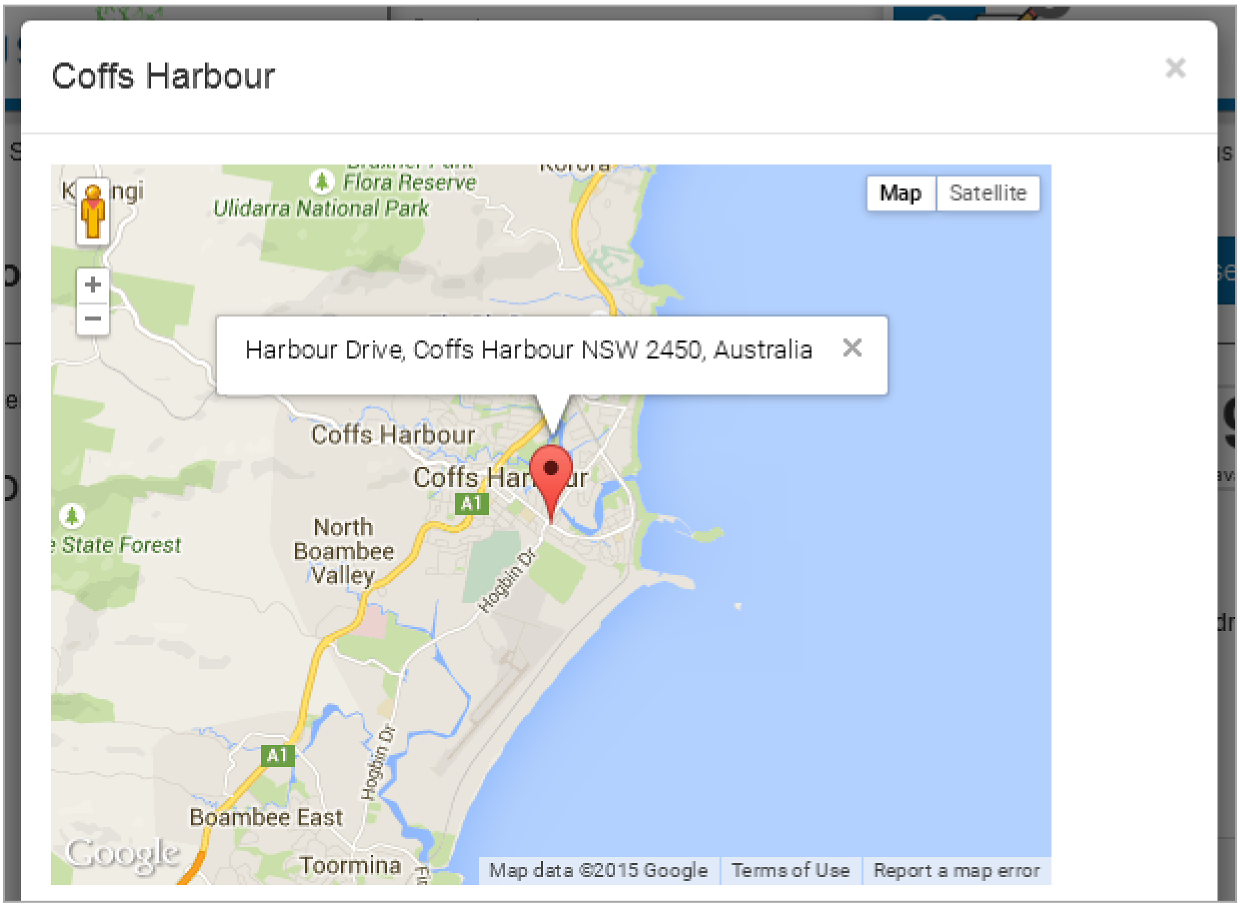
From this page, the User can:

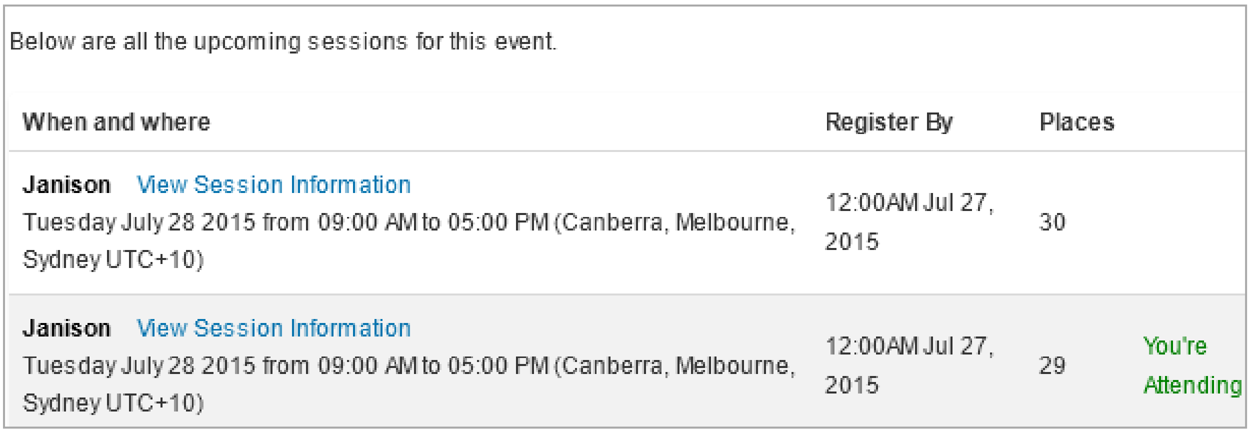
- View Session information.
- Download attachments.
- Choose whether to attend or withdraw from the session (if permitted, see introduction for details)
- See a Google map popup of the venue location by clicking on the venue name:



Note that **Show map** needs to be checked for the Session and its Location and Venue set up, see Locations and Venues for details

The user can access this screen from:

- The Sessions list screen Users see when they first enrol in the Learning Event
- The Sessions list screen Users see when they visit the Learning Event from their My Learning screen:

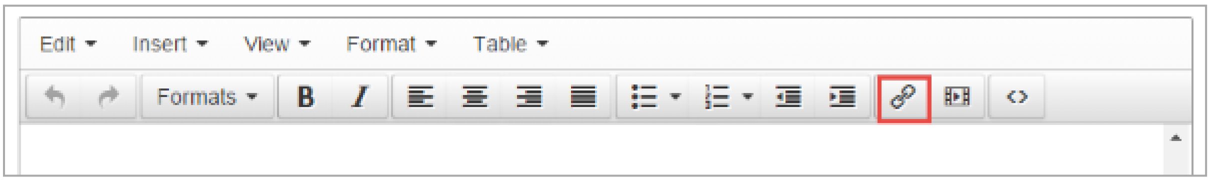


Below are all the upcoming sessions for this event.

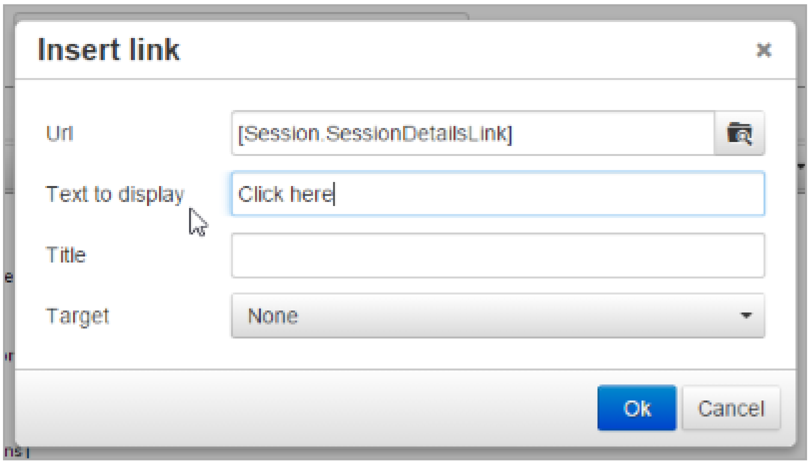
When and where	Register By	Places	
Janison View Session Information Tuesday July 28 2015 from 09:00 AM to 05:00 PM (Canberra, Melbourne, Sydney UTC+10)	12:00AM Jul 27, 2015	30	
Janison View Session Information Tuesday July 28 2015 from 09:00 AM to 05:00 PM (Canberra, Melbourne, Sydney UTC+10)	12:00AM Jul 27, 2015	29	You're Attending

- A hyperlink that the administrator can insert in the email message that is sent to Users when they enrol in the Session.

To insert this hyperlink using the rich text editor, insert a link:



Type the name of the token [Session.SessionDetailsLink] into the URL address:

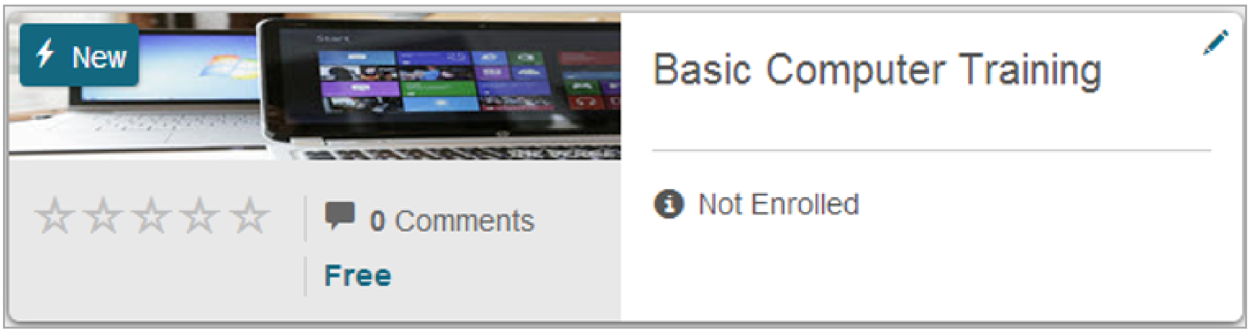


In the example above the link above will appear as Click here to Users and it will take them to the Session Information screen.

Of course, this link to the Session summary screen can also be inserted into any Template relating to Learning Event Sessions by using the same token, see Message Templates.

Manage a Session and Waiting Lists

Once an Event and its Sessions have been created and the Event has been placed into a Catalogue Item, it is available for Users to register their interest depending on the settings, see Introduction for details.

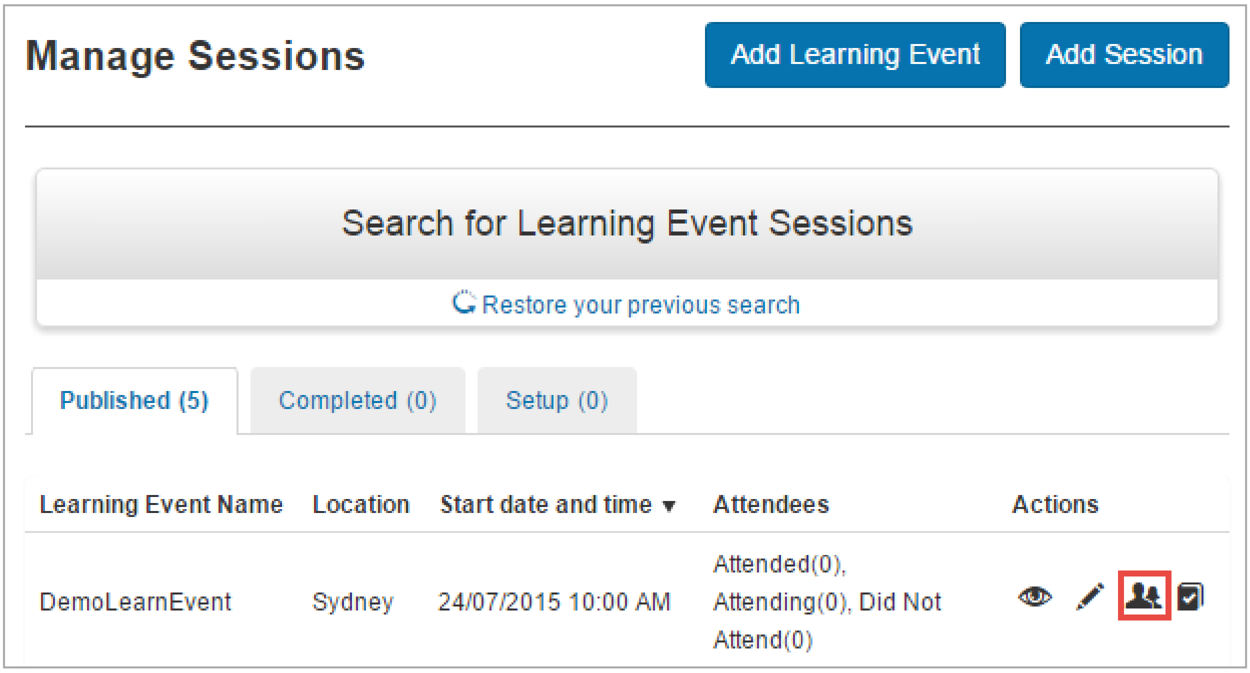


The **Manage Session** screen allows the Event facilitator to examine Session details and allocate Users to that Session. The screen displays attending Users and also the:

- Session waiting list.
- Event waiting list.

Users can be moved directly from the waitlists to the Attendee list (and vice versa). When a User has been moved from a waitlist to the Session they will receive a system notification email advising them of the enrolment and Session details.

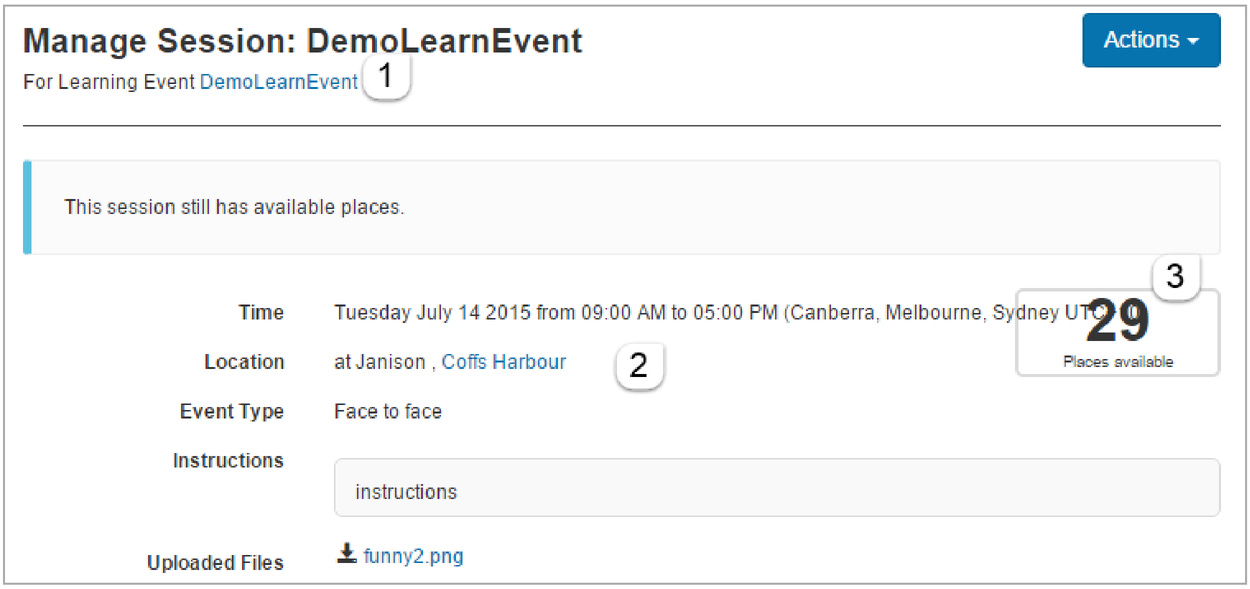
To manage a Session select **Manage Learning** > **Manage Sessions**. Locate the Session and click its **manage icon**.



You will be taken to the **Manage Session** screen where you can view attendees and waitlisted Users for the Event and the Session.

The main components of the screen show:

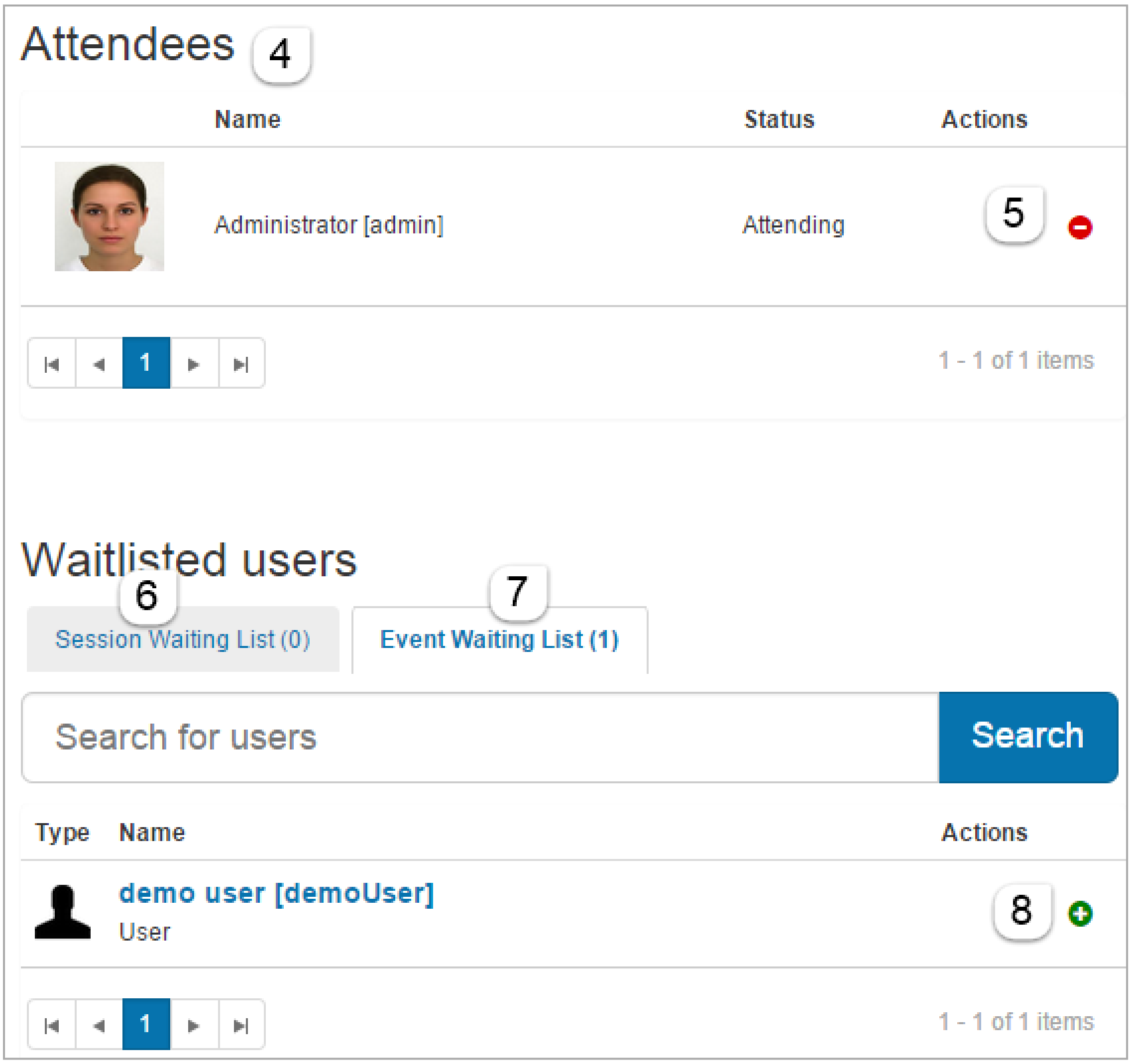
1. The names of the Session and a link to its Learning Event
2. The details of the Session
3. The number of places available



4. The list of enrolled Attendees
5. You can delete an attendee by clicking the minus icon. S/he is then moved to the Session waitlist for this Session. Other Sessions will see that attendee on their Event Waitlist so s/he can also be moved into a different Session and removed from all waiting lists.

There are two tabs under **Waitlisted Users** (the Sessions waitlist and the Event waitlist). Click a tab name to display that list. Both lists can be sorted by entering search terms and clicking **Search**

6. The Session waiting list refers to the Session you are currently managing
7. The Event waiting list refers to the Learning Event attached to the Session you are managing.
8. On either list click on the **plus** icon to approve a User. S/he will disappear from the Waitlist and appear in the Attendee list of this Session.

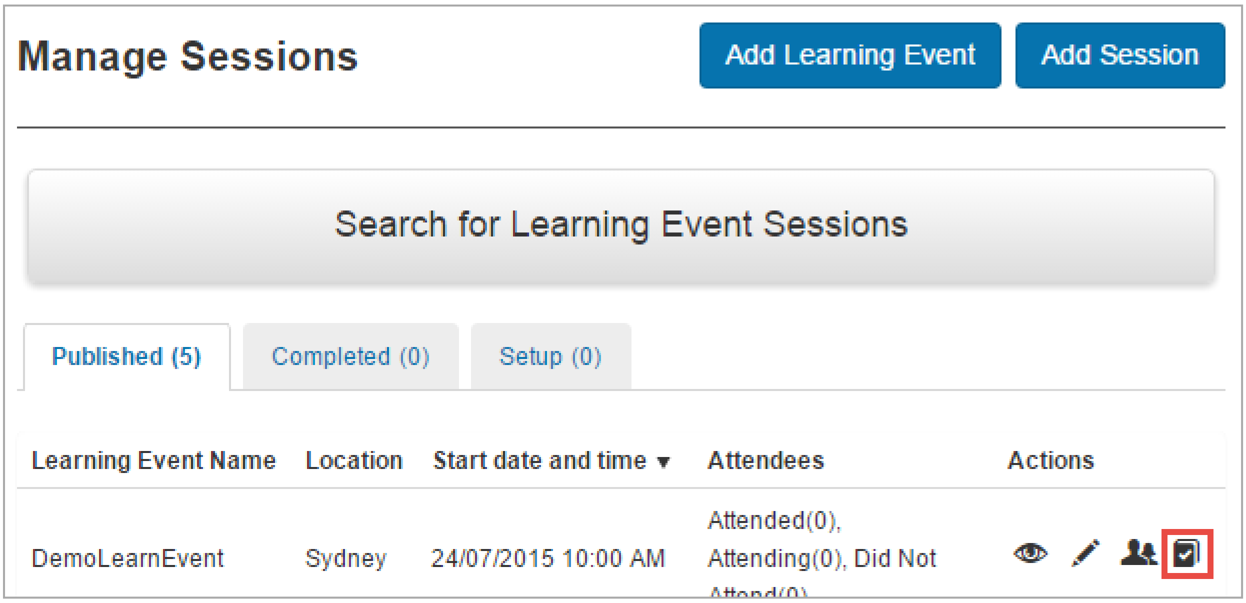


Note that you do not have to save this screen for your waitlist changes to take effect.

Mark a Session

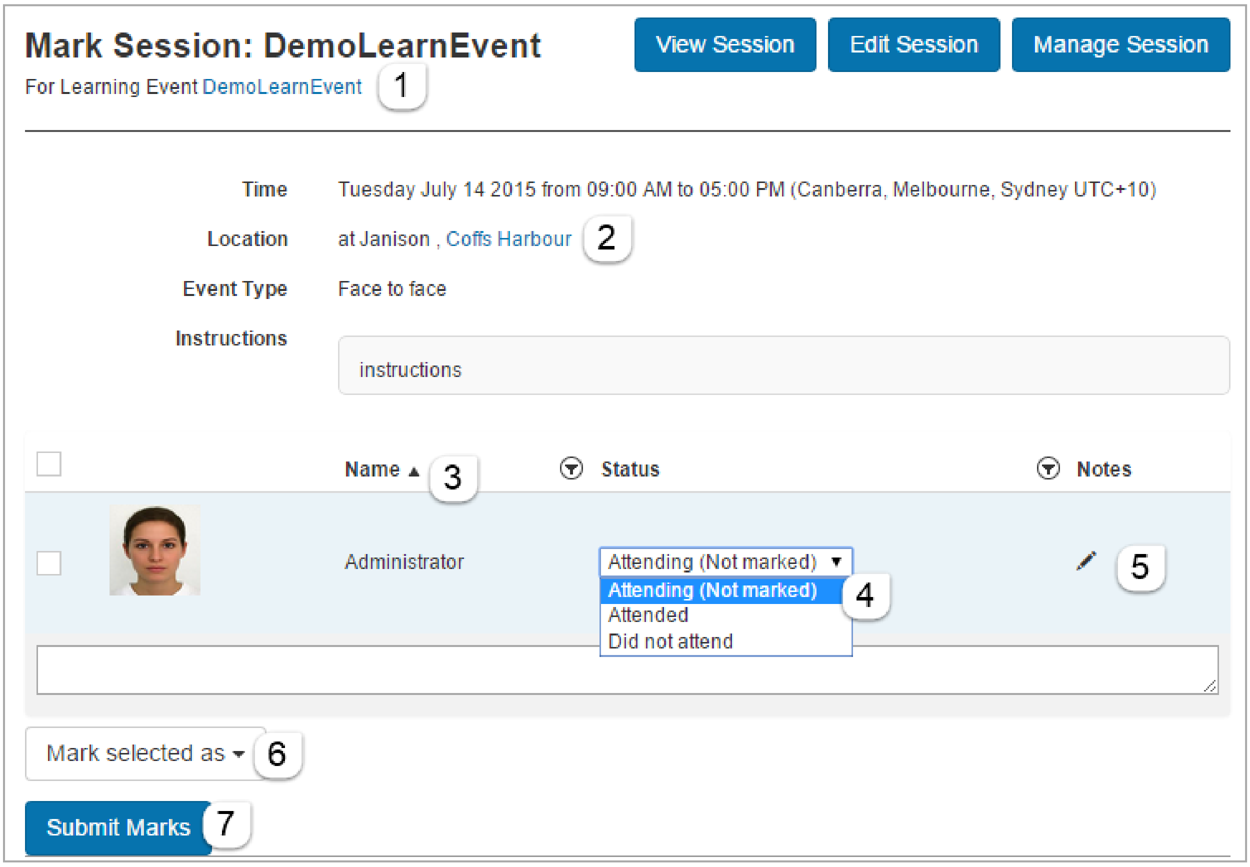
Authorised User(s) need to inspect the Users in a Session and to mark whether they attended or not. Depending on what has been set up for the Learning Event they may also need to award Competencies.

To inspect and manage a Session select **Manage Learning** > **Manage Sessions**. Locate the Session and click its **Mark** icon.



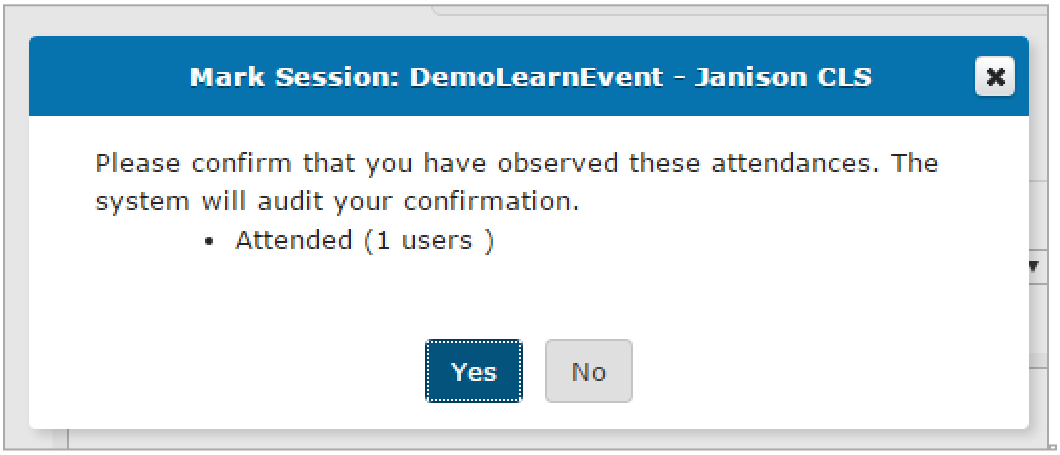
The main components of the screen show:

1. The names of the Session and a hyperlink to its Learning Event
2. The details of the Session
3. A list of the Attendees.

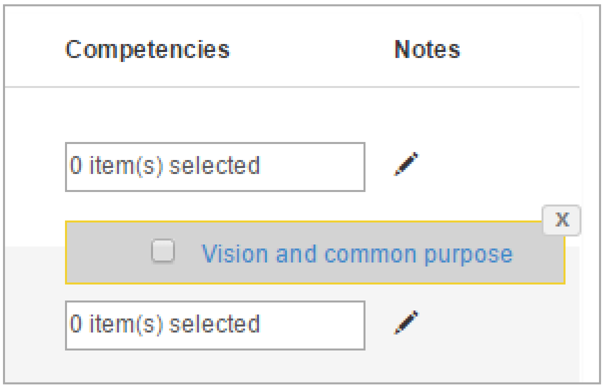


4. Your task is to click on the Status drop-down for each User and update their attendance record with one of the four options.
5. If you wish to you can add notes to the User's attendance record by clicking the Edit pencil. A box opens for text entry. Click the pencil again to close it.
6. Alternatively, if there are a large number of Users, you can click the checkbox to the left of each user and use the **Mark Selected As** option to bulk assign *Attended* or *Did not attend* status.
7. Marks are not submitted until you click **Submit Marks**

You will be asked to confirm this:



Note that there will be an additional column in the list above if Competencies were attached to the Session's Learning Event and the option had been chosen to require the facilitator to manually award them. If so, click in the Competencies box and click the check box to select the Competency:

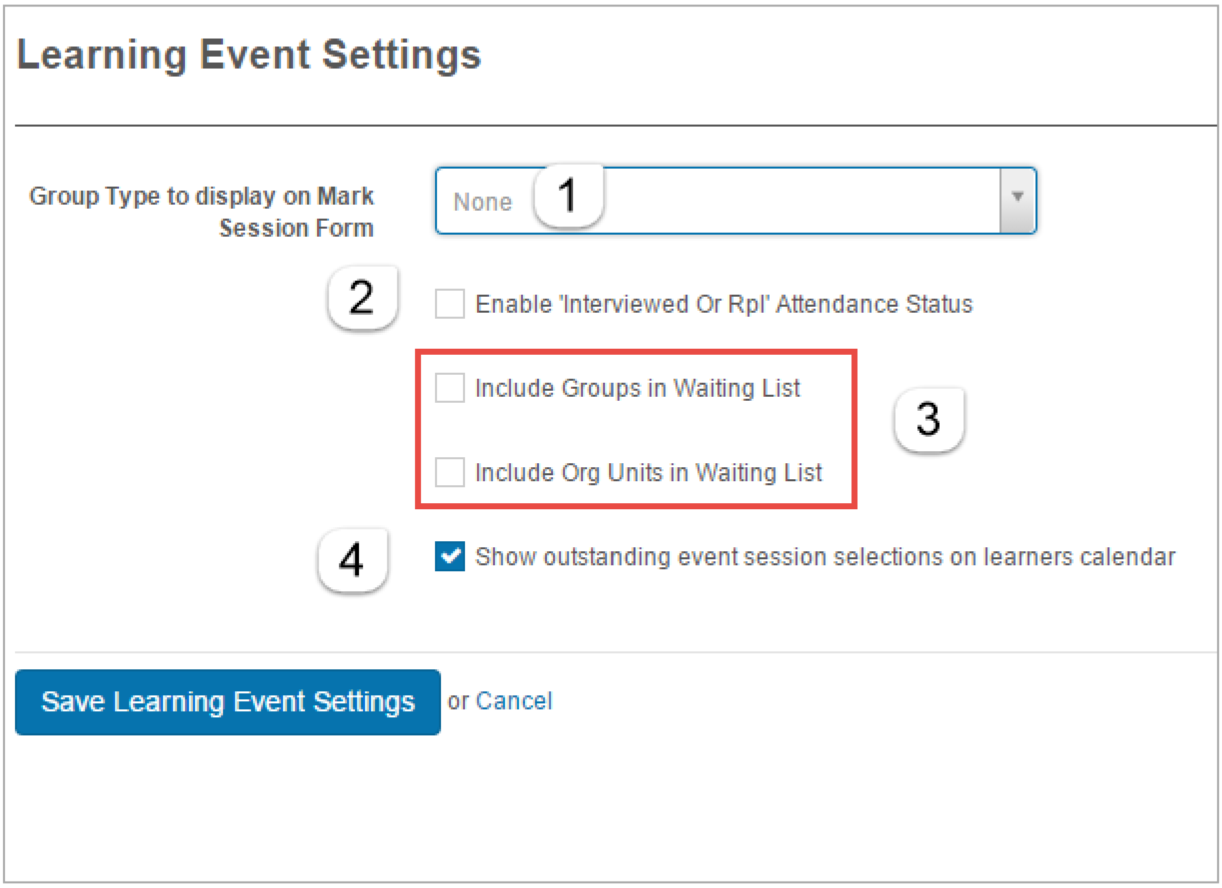


Note that if you need to come back and modify the marks in a completed Session, you first need to edit the Session and change its status to 'Published'.

Learning Event Settings

These can be specified via **Settings** > **Learning Event**. There are a number of setting that relate to Sessions and Learning Events, including.

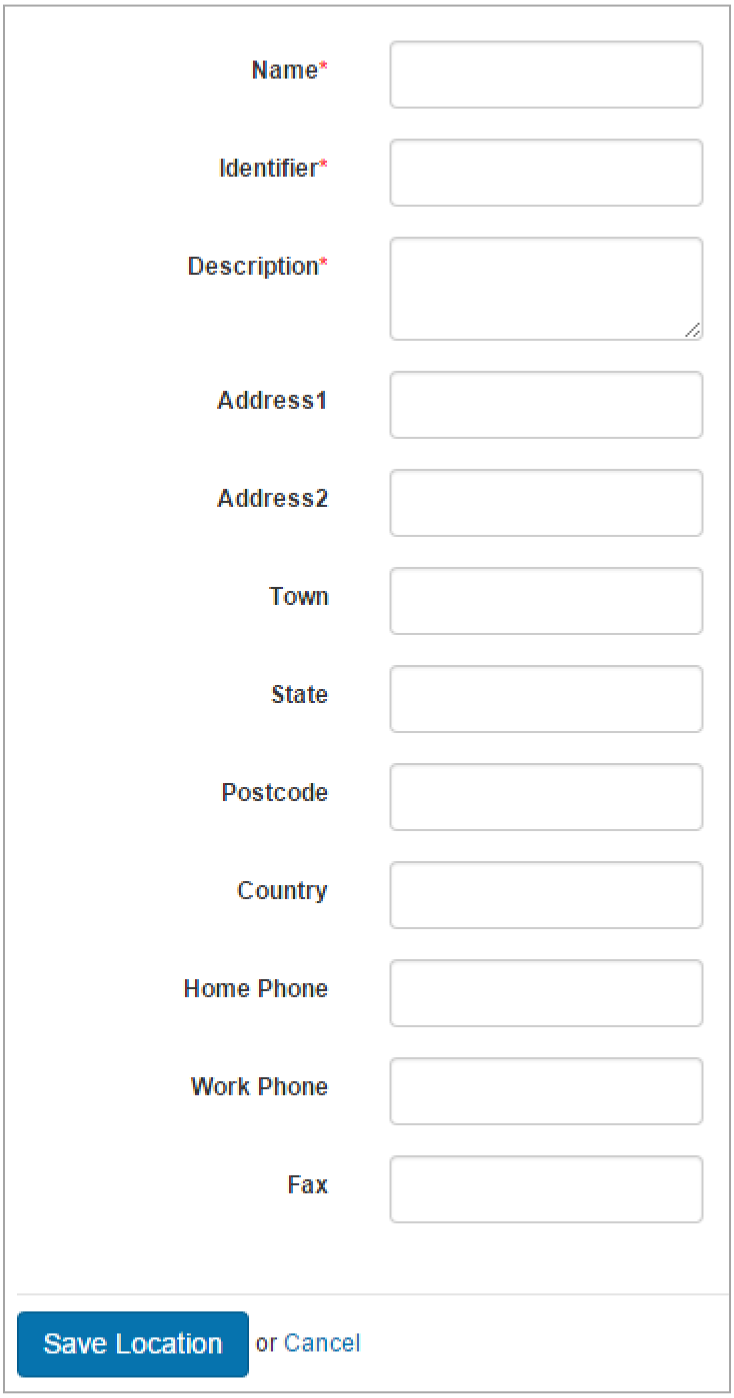
1. **Group Type** – click and select a Group type
2. **RPL** can be added to the options that a Session marker can choose from. It is then compulsory for the marker to add some notes
3. These option enables the movement of whole groups and org units between waiting lists and attendee lists
4. Click to show outstanding Sessions on learner User's calendar



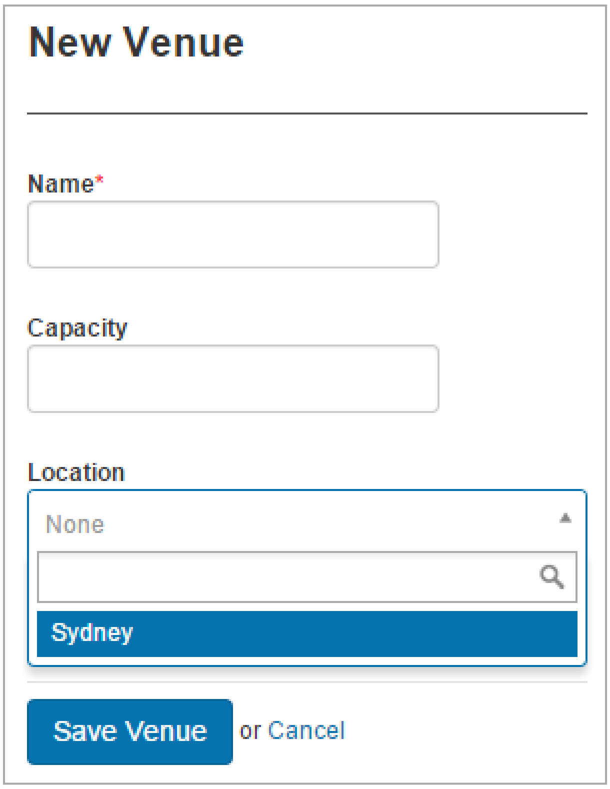
Locations, Venues and maps

To offer maps for Sessions you need to set the Venue when you add or edit the Session. And this venue must be linked to a Location with a physical address.

To add a Location select **Settings** > **Locations** > **Add Location**. At a minimum enter the required fields (marked with an asterisk) and the physical address details.



To add a Venue select **Settings** > **Locations** > **Add Venue** and select the location that you have just created.



Note that you can also use **Quick Add Venue** in the Sessions add/edit screen if you make sure to select a location that you have set up with a physical address.

Message Templates and Sessions

Message Templates are the templates for automatic email messages that are sent from the Janison CLS. They are customisable so that you can alter the words used, links and pieces of information included. These pieces of information are called tokens and are drawn from the CLS database, see **Settings** > **Message Templates**.

The following Message Templates can be involved in Session management:

LearningEvent-AttendeeAdded	This message is sent to a User after s/he is successfully enrolled in a Session.
LearningEvent-InProgram-AttendeeAdded	This message is sent to a User after being successfully enrolled in a Session. Note that the Learning Event is in a Program.
LearningEvent-AttendeeAdded-ManagerNofify	This message is sent to a User’s manager after User is successfully enrolled in a Session

LearningEvent-AttendeeAdded	This message is sent to a User after s/he is successfully enrolled in a Session.
LearningEvent-AttendeePend-ingApproval	This message is sent to Users who have requested approval into a Session. They are told that they will be notified once the request has been approved or rejected.
LearningEvent-AttendeeRemoved	This message is sent to a User after s/he is removed from a Ses-sion.
LearningEvent-AttendeeSes-sionCancelled	This message is sent to Users after being waitlisted for an event when the Session that the User enrolled in is cancelled. They are also told that they have been placed on the waiting list for other Sessions.
LearningEvent-AttendeeWaitl-isted	This message is sent to a User after being waitlisted for a Session.
LearningEvent-AttendeeWaitl-isted-ManagerNofify	This message is sent to a User’s manager after User is waitlisted for a Session.
LearningEvent-AttendeeWith-drawn-ManagerNofify	This message is sent to a User’s manager after the User withdraws from a Session.
LearningEvent-NewSes-sionForRegisteredUsers	This message is sent to all registered Users of current Learning Event. They are told that they have registered interest for this event and that a new Session is now available that might interest them.
LearningEvent-NewSes-sionForWaitlistedUsers	This message is sent to all waitlisted Users of current learning event. They are told that a new Session is now available that might interest them
These relate to updated Sessions:	
LearningEvent-UpdateSes-sionForRegisteredUsers	This message is sent to registered Users when the Session details are changed. They are told that they have registered interest for

LearningEvent-AttendeeAdded	This message is sent to a User after s/he is successfully enrolled in a Session.
	this event and given the updated details of the Session.
LearningEvent-UpdateSes-sionForWaitlistedUsers	This message is sent to waitlisted Users when the Session details are changed. They are told that they are currently waitlisted for this Learning Event or for one of its Sessions. They are given the updated Session details and asked whether they would like to remain on the waitlist.
LearningEvent-AttendeeSes-sionUpdate	This message is sent to a User who is attending when the session details are changed.
LearningEvent-InProgram-AttendeeSessionUpdate	This message is sent to a User who is attending when the session details are changed. Note that the Learning Event is in a Program