ILT – Manage Events & Sessions – Quick Guide

- **Instructor Led Training (ILT) Overview:**
  - **ILT consists of three elements:**
    - **Events:**
      - These are containers for the Sessions.
        - Reuse Events whenever possible, don't make multiple copies of the same event.
          - Same content, length, price = same Event
          - Different content, length, or price =New Event
        - Never substantially edit (change duration or significant content) an Event that has completed Sessions (the changes affect all users who have attended those Sessions in the past creating incorrect data).
    - **Sessions:**
      - These are what users register for and are instances of the Event.
        - **Contact HRLearning@MissouriState.edu to handle cancellations and changes.**
        - Never cancel a session that you are charging for and has registered users.
        - Never cancel completed Sessions!
        - Never edit completed Sessions to turn them into a new Session (use the copy button instead)!
    - **Parts:**
      - These are every time a cohort of attendees meet for a Session; if only one Part exists, that Part IS the Session.
      - The actual schedule for a Session consists of all the Parts within that Session.
      - Be sure to reserve your location (room) via the appropriate reservation system. My Learning Connection (MLC) does not reserve rooms.
    - **Rosters:**
      - Please submit completed Rosters (w/attendance) within a week of Session completion.
      - Never remove users from a paid Session (contact HRLearning@MissouriState.edu).

- **Event Rules for Non-credit Fee Waiver (NCFW)**
  - The Organizational and Talent Development (OTD) team must approve all events that may be paid for with NCFW funds. This may take some a couple of weeks (plan ahead).
  - **NCFW Approval Process:**
    - If charging for a new Event, OTD approval is required.
    - **Note:** NCFW funds cannot be used for fundraising, meals, or non-university events.
    - Send Event details to HRLearning@MissouriState.edu
      - Event name
      - Description
      - Audience (Availability)
      - Is this a university owned or sponsored Event?
      - Do the funds go to the university or an outside party?
      - Which of these categories does the event align with (please explain)?
        - Professional Development
        - Personal Development
        - Employee Wellness

- **Creating /Editing Events:**
  - **Properties:**
    - **Event Name:** (Be clear and descriptive)
    - **Training Hours:** (should equal total contact hours in a session)
    - **Description:** (should tell users what to expect from the course)
    - **Subject:** (must select at least one)
    - **Options:**
      - **Active** (check to make visible to users)
      - **Allow Users to Attend Multiple Sessions** (check unless good reason not to check)
      - **Allow Interest Tracking** (recommended)
    - **Ability to Select Sessions:** (select one of both)
      - **End Users** (recommended)
      - **Admin and Managers** (this is up to you)
    - **Training Contact:** (the person who can answer questions about the event)
  - **Availability:** (If you don't see the checkboxes, no Availability has been set)
    - **Select Criteria**: (dropdown list – typical options)
      - **All Users** (recommended – must click the 'Add' button afterward)
      - **Division** (must select division(s) afterward)
      - **Users** (must select user(s) afterward)
    - **Checkboxes**: (click the appropriate boxes, usually all three unless charging for event)
      - **Include Subordinates** (check unless the criteria logically excludes subordinates)
      - **Pre-Approved** (always check)
      - **Register Upon Approval** (check for all FREE events)
  - **Pricing**
    - **Default Price:** (enter price if not zero)
    - **Do not Create Pricing LOs by OU Rules**.
  - **Training Units:** (don't touch anything on this page)
  - **Session Defaults:** (set these here to make sessions easier later!)
    - **Registration:** (use your best judgement here)
    - **Waitlists:** (recommend default values)
    - **Cost:**
      - **Price per Session:** (enter price, if not zero)
      - **Restrict Withdraw from Session:** (check if charging)
    - **Advanced Criteria:**
      - **Credits per Session:** (this should equal the contact hours per session)
    - **Prerequisites:** (usually none)
    - **Additional Requirements:**
      - **Display Times in Time Zone of User:** (check this)
  - **'Save' button:** (click when done)

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- **Create / Editing Sessions:**
  - **Options:** (Create, Edit, Cancel, Roster)
    - **Create Session:** (recommend using this over copy)
      - **Part Schedule:** (this schedules each time the session meets)
        - **Add Part** (same as Edit Part)
          - **Name:** (Set it apart from other Parts)
          - **Location:** (pick from list; this does NOT reserve the location)
          - **Date and Time:** (be sure this is accurate!)
          - **Part Break:** (if needed)
          - **Part Occurrence:** (this allows you to schedule Parts that recur)
        - **Verify no conflicts** (Add/Edit parts if needed)
      - **Details:** (Everything should be pre-populated based on Session Defaults, except *)
        - **Session ID *:** (be descriptive or use date/time)
        - **Credits *:** (verify that this equals the total duration of all Parts)
        - **Registration:**
          - **Attendance *:** (how many parts…? Must be at least one)
        - **Cost:** (if not zero, check 'Restrict Withdraw from Session)
      - **Availability:** (This should be pre-populated based on Session Defaults)
        - **Select Criteria**: (If you don't see the checkboxes, no Availability has been set)
          - (See instructions for Event Availability for details)
      - **Pricing:** (This should be pre-populated based on Session Defaults)
      - **Training Units:** (This should be pre-populated based on Session Defaults)
      - **Summary:** (List settings for the Event, Session, and Parts)
        - **Verify before saving.**
    - **Edit Session:** (same interface as Create Session)
      - Be sure to change Part Schedule & Session ID)
    - **Cancel Session:** (NEVER cancel session with registered users)
      - **If you need to cancel a Session, contact HRLearning.**

- **Manage Rosters:** (lists scheduled attendees & allows for tracking and modifications)
  - **Roster:** (Please update rosters and submit within one week of Session completion)
    - **Export to Excel button** (top right of page)
      - **Use this to manage/copy user data: such as email addresses.**
    - **Print Sign-In Sheet** (creates a printable sign-in sheet for tracking attendance)
    - **Email Registered Users** (not recommended: zero feedback & can't reply)
    - **Add Users** (select users one at a time to add to the Session)
    - **Withdraw / Move Users** (Never remove users from paid Sessions!)
    - **Download 'Bulk Add Users' template** (load up to 100 users at a time)
    - **Registered Users List** (lists users with their info, status, attendance, and score)
      - **Show Withdrawn/Removed Users checkbox** (check to see them)
      - **'Remove User' button** (Never remove users from Paid Sessions!)
  - **Attendance and Scoring:** (manage attendance and scoring for each Part)
    - **Attendance Checkboxes:** (check each Part that each user attended)
    - **Score fields:** (add scores if applicable)
    - **Pass Checkboxes** (checked by default only uncheck for good reason)
  - **'Save' button:** (click if you need to update later)
  - **'Submit Roster' button:** (click to finalize the roster; no future updates)