



Administrator Reference Guide

You are highly encouraged to complete the Orientation to sccLearn Administration web based training AND practice the activities in this guide in the sccLearn Sandbox System (<https://scclearn.stage.sumtotal.host>) to become familiar with the tasks before working in the production sccLearn system (<https://scclearn.sccgov.org>)

Revision History

Ver.	Description	Date
1	Initial Version	Aug. 2020
2	Clarified Cancel Class and Deactivate Course instructions. Added instructions to view the Express Interest list and a note to indicate Copy Class does not send notifications.	Sept. 2020
3	Updated to include User Notes and Registration Instructions. Clarified managing multiple day rosters.	Nov. 2020

1 - Introduction

As an administrator of sccLearn, this guide assumes that you have completed the Orientation to Administration web-based training in sccLearn. Therefore, you should already be familiar with:

- Your role as an administrator of sccLearn
- The production sccLearn system used by all employees
- The sandbox system that you can use for practicing the steps contained within this guide
- The difference between stage and production status
- The terminology around activities and how these activities appear to the learner
- How to navigate the administrator pages in sccLearn

If you have not completed the Orientation to Administration web-based training, you are **strongly advised** to do so before continuing with this guide. You are also encouraged to practice the tasks in the sandbox system prior to creating activities in the production system.

Notes:

- This training ONLY covers activities related to **Instructor Led Training** which are delivered in person in a classroom setting or virtually as a webinar via an online platform.
- The guide also covers both **Single Day Classes** as well as **Multi-Day Classes** which occur over the course of several days.
- To administer web-based activities, contact the sccLearn Program Manager.
- If you have not received your permissions to administer the system, please contact the sccLearn Program Manager.

sccLearn Program Manager: LED@ceo.sccgov.org

You are highly encouraged to complete the Orientation to sccLearn Administration web based training AND practice the activities in this guide in the sccLearn Sandbox System (<https://scclearn.stage.sumtotal.host>) to become familiar with the tasks before working in the production sccLearn system (<https://scclearn.sccgov.org>)

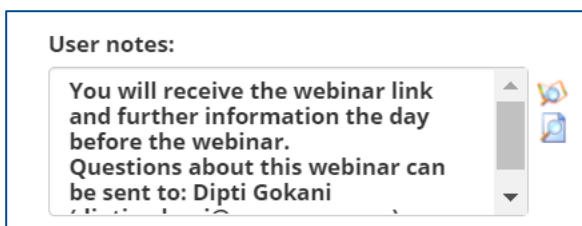
Guide Sections

To make it easier to work through this guide, the layout of the remaining sections will follow the order listed below. Section items have been hyperlinked. Once you are familiar with administration duties, you can use the hyperlinks to go directly to items of interest. Page numbers are provided for hardcopy guides.

[Section 2 - Course Creation \(Page 6\)](#)

General Properties: Name, Primary Domain, Activity Image, Description, Owner, Status, User Notes, Registration Instructions, User Notes

User Notes are displayed on the activity summary page (under the Notes tab) and are also emailed to the learner when they have successfully completed their registration for the class.

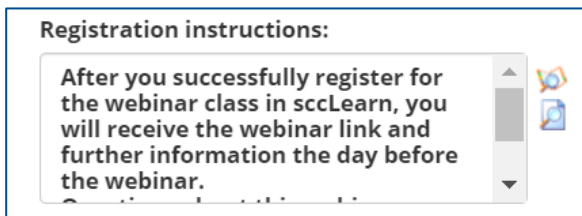


Notes:

- Utilize User Notes to provide information to the learners.
- For Webinar activities this could include details of when learners will receive the virtual location access details, as well as who to contact if they have additional questions.

Registration Instructions

Registration Instructions are displayed to the learner while they are completing their registration for the class.



Notes:

- Utilize Registration Instructions to provide information to the learners as they register for the activity.
- For Webinar activities this could include details of when learners will receive the virtual location access details, as well as who to contact if they have additional questions.

Estimated Duration

Registration Properties: Availability, Minimum and Maximum Capacity, Express Interest Threshold, Audiences

Management Properties: Topics

Publishing: Save, Validate for Production, Move to Production

Section 3 - Class Creation (Page 22)

Create New Activity

Course Title, Start Date, End Date, Maximum Capacity, Express Interest Notification

General Properties: Name, Primary Domain, Activity Image, Description, Owner, Status, User Notes, Registration Instructions, Grading and Completion, Estimated Duration, Pick Rule

Registration Properties: Start Date and End Date, Registration Deadline, Cancellation Deadline, Availability, Minimum Capacity, Waitlist Threshold, Audiences

Single Day Class Resources: Instructors, Locations, Save, Waiting List Properties

Multi-Day Class Properties:

Multi-Day Class General Properties (Session 1): Name, Create New Session, Name, Owner, Estimated Duration

Multi-Day Class Schedule Properties (Session 1): Start Date and End Date, Registration and Cancellation Deadlines

Multi-Day Class Resource Properties (Session 1): Instructors, Locations, Save

Multi-Day Class Additional Sessions (2+): Copy Session 1, Configure Options

Multi-Day Class General Properties (Session 2+): Name, Owner, Estimated Duration

Multi-Day Class Schedule Properties (Session 2+): Start Date & End Date, Registration & Cancellation Deadlines

Multi-Day Class Resource Properties (Session 2+): Instructors, Locations, Save **Waiting List Properties:** View Tracks, Waiting List Type, Smart Waiting List

Expiration Date, Smart Waiting List Hold Time, Save Waiting List

Publish: Validate for Production, Move to Production

4 - Pre-Class Roster Management (Page 57)

View Instructor Led Training (ILT) Class Roster: Registered, Canceled, and Attended Learners, Waiting List Learners, **Export Learner Names, Add Learners to Class Roster or Wait List, Cancel/Drop Registrations, Print Built-in Class Sign-In Sheet, Email Learners**

5- Post-Class Roster Management (Page 68)

Mark Attendance for a Class: Wait Listed Learners that Attended as Walk-in Learners, Walk-in Learners that Attended Without Registering, Registered Learners that Did Not Attend, Registered Learners that Attended, Wait Listed Learners that did Not Attend, **Correct Status of Completed Class**

6 - Miscellaneous Activity Related Tasks (Page 78)

View Express Interest List

Edit Activity: Impact to Learners; Edit Class; Changing Class Date; Send to Stage; Validate for Production; Move to Production

Copy Existing Class: Class Dates, Quantity, Properties to Copy, Locations and Instructors, Waiting List Properties, Publish the Class, Configure Additional Copies

Cancel Class: Notify and Remove Wait Listed Learners, Notify and Cancel Registered Learners, Cancel Class

Deactivate Course: Notify and Remove Wait Listed Learners, Notify and Cancel Registered Learners, Notify and Remove Express Interest Learners, Deactivate Course

2 - Course Creation

This guide covers the properties related to Course Creation for Instructor Led Training (ILT) activities as well as Webinar activities.

Before you begin creating courses, decide if you will be creating:

- An **Instructor Led Training course** where the delivery method may classroom-based or virtually.
- A **Webinar Course** where the delivery method will **always** be virtual.

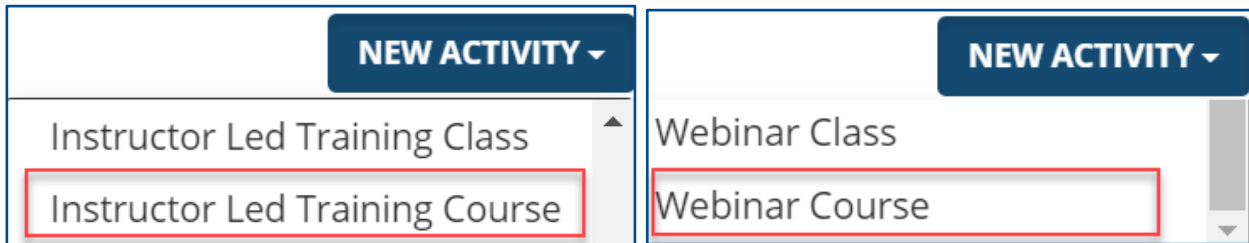
Notes:

- Select **Instructor Led Training** if you are unsure of the delivery method for the class.
- Many of the properties you configure during the course creation process will be transferred to the class when you create it.
- Configure the properties carefully to ensure your course functions as expected.

You are highly encouraged to complete the Orientation to sccLearn Administration web based training AND practice the activities in this guide in the sccLearn Sandbox System (<https://scclearn.stage.sumtotal.host>) to become familiar with the tasks before working in the production sccLearn system (<https://scclearn.sccgov.org>)

Create New Course

Click the drop-down arrow beside **NEW ACTIVITY** and select **Instructor Led Training Course** or **Webinar Course**.

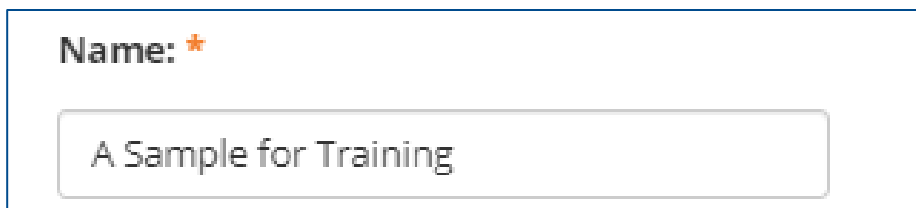


The **Learning Activity Properties** page will be displayed.

General Properties

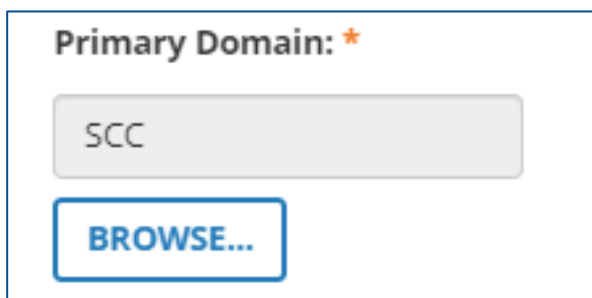
Name

Replace “**New Activity...**” with the title of the course you are creating.

The image shows a screenshot of a form field. The label 'Name: *' is positioned above the input field. The input field is a rounded rectangle containing the text 'A Sample for Training'.

Primary Domain

Your default domain is automatically added.

The image shows a screenshot of a form field. The label 'Primary Domain: *' is positioned above the input field. The input field is a rounded rectangle containing the text 'SCC'. Below the input field is a blue button with the text 'BROWSE...' in white.

Note:

- Do **NOT** change the Primary Domain unless you have been directed to do so.


Activity Image

Select an image for your training to enhance the sccLearn user experience.

Activity Image:

Enter URL:

Upload Image:



EDIT
DELETE

Notes:


- Standard images are available for each of the Activity Types.
- Custom images should be appropriate, real life color imagery of people associated with the activity. Clipart and cartoon images are not acceptable.
- Optimal image should use a 16:9 ratio, 221 x 124 pixels with a maximum file size of 500KB
- Contact the sccLearn Program Manager for guidance on images.

Description

Type your description or cut and paste the description from **notepad**.

Description: Preview

```
<p>Lorem ipsum dolor sit amet,
consectetur adipiscing elit. Maecenas
porttitor congue massa.</p>
<ul>
<li>Fusce est. Vivamus a tellus.</li>
</ul>
```

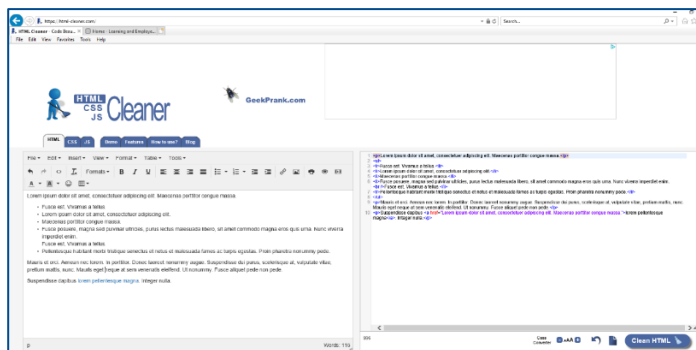


Use the **Preview in HTML** button to confirm the description is displayed correctly. The preview displays with double line spacing which will be corrected once published.

Notes:

- For webinars, it is best practice to include information on when learners will receive the virtual location access details and who to contact if they have additional questions.

- If your description contains **any** formatting such as bold text, bullets, etc., you will need to format your description using HTML tags for it to be displayed correctly.
- You can use a free online tool such as HTML Cleaner (<https://html-cleaner.com>). Simply paste your text in the left pane and format as necessary. Copy the HTML text from the right pane into the description box in scLearn.



Owner

The Activity Owner is **required to be set to your department** in scLearn for organizing, tracking and auditing purposes.

Note:

- This property always defaults to the name of the administrator creating the course and **must be changed on all activities**.

To change the Owner:

1. Click the **Browse** button.

Owner:
Dipti Gokani
BROWSE...

2. In the **Search** field, type **SCC-Owner** (or type in your Department's Owner Username provided to you by the scLearn Program Manager) and click the **search icon**.

SumTotal

SELECT A USER

Follow the instructions below to search for a user.

Search: [Help](#)

Notes:

- Department's Owner Usernames use the naming convention:

SCC-OWNER-ASR	SCC-OWNER-LED
SCC-OWNER-CCO	SCC-OWNER-LP
SCC-OWNER-CEO	SCC-OWNER-LR
SCC-OWNER-CEPA	SCC-OWNER-OES
SCC-OWNER-CJIC-JRS	SCC-OWNER-OSEC
SCC-OWNER-CONTR	SCC-OWNER-PARKS
SCC-OWNER-EAP	SCC-OWNER-PARKS-EXT
SCC-OWNER-EO	SCC-OWNER-PHD
SCC-OWNER-EWD	SCC-OWNER-PRO
SCC-OWNER-INFOSEC	SCC-OWNER-PROC
SCC-OWNER-ISD	SCC-OWNER-RM

- Your Department's Owner Username may not appear in this table if it was created after this guide was developed.
- Contact the Ask Clara to request new Department Activity Owners to be configured.

3. Click the radio button next to your Department's Owner Username and click **OK**.

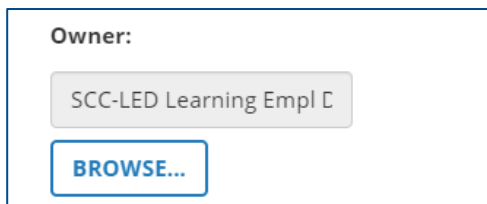
SELECT A USER

Select one user from the list below and click OK.

Search: [Help](#)

Name	Username	Manager	Print
<input checked="" type="radio"/> SCC-LED Learning Empl Development	SCC-OWNER-LED		Ext...

4. Owner should now reflect your selection.

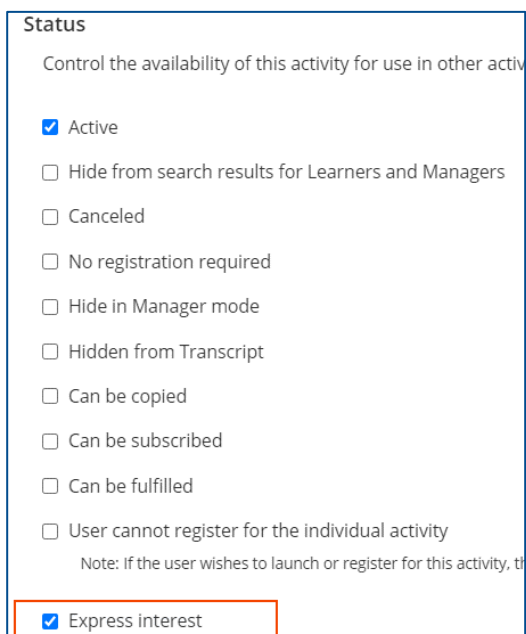


Owner:
SCC-LED Learning Empl D
BROWSE...

Status

Required Setting: **Active** - The course must be Active to be able to register for it.

Optional Setting: **Express Interest** - If selected, your course will allow learners to express interest to be notified when a class is offered.



Status
Control the availability of this activity for use in other activities

- Active
- Hide from search results for Learners and Managers
- Canceled
- No registration required
- Hide in Manager mode
- Hidden from Transcript
- Can be copied
- Can be subscribed
- Can be fulfilled
- User cannot register for the individual activity
Note: If the user wishes to launch or register for this activity, the user must be able to register for the individual activity.

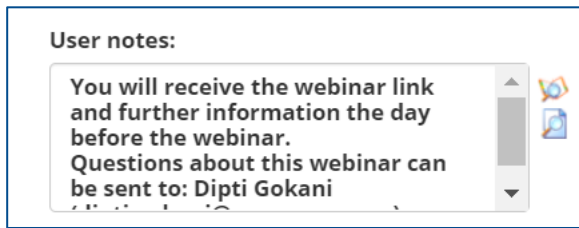
Express interest

Note:

- Do **NOT** make changes to any of the other Status settings.

User Notes

User Notes are displayed on the activity summary page (under the Notes tab) and are also emailed to the learner when they have successfully completed their registration for the class.

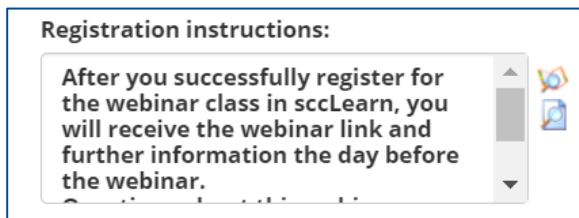


Notes:

- Utilize User Notes to provide information to the learners.
- For Webinar activities this could include details of when learners will receive the virtual location access details, as well as who to contact if they have additional questions.

Registration Instructions

Registration Instructions are displayed to the learner while they are completing their registration for the class.



Notes:

- Utilize Registration Instructions to provide information to the learners as they register for the activity.
- For Webinar activities this could include details of when learners will receive the virtual location access details, as well as who to contact if they have additional questions.

Estimated Duration

Enter the number of **instructional hours**.

Estimated duration: *	
Hours	Minutes
<input type="text" value="7"/>	<input type="text" value="00"/>

Note:

- A class from 9:00 AM to 5:00 PM is 8 hours from start to finish, but the instructional hours would only be 7 hours if the lunch break is 1 hour.

Registration Properties

Availability

Required Setting: **Open for Registration** – To allow learners to register for the course when published.

Availability

Set the capacity of the activity, approvals, registration rights, and dates to lock the roster.

Open for registration

Allow one click registration

Minimum and Maximum Capacity

Capacities will be entered at the class level and not the course level. Leave these two fields blank.

Minimum capacity:

Maximum capacity:

Notes:

- Do **NOT** enter capacities at the course level.
- Capacities entered at the course level can cause registration issues.

Express Interest Threshold

Enter a threshold number value if you checked the **Express Interest** for the Status property or leave this field empty if there is no threshold.

Express Interest Threshold:

Notes:

- This is an optional property.
- This property is **only** configured if **Status (Express Interest)** was selected. When the threshold number of learners have expressed interest in this course, a notification will be sent to the **Activity Owner** that was configured for this course.

Audiences

The Audience allows you to restrict the visibility of the course to a limited group of learners such as only managers and supervisors or one department. If the default audience is not appropriate for your course, follow these steps to change it to an appropriate audience.

Notes:



- Select only one audience type for each course.
- If you plan to offer the course to different audiences, it is best to use the default audience type at the course level and restrict the individual class audiences when they are created.
- Contact the sccLearn Program Manager for guidance on audience types for your department.
- Contact the Ask Clara to request new audience types to be configured.






To replace the default audience:


1. Delete the original audience type by selecting the check box next to the unwanted audience name, then click **Delete**.





Audiences

Determine which audiences can view and register for this activity. If this list includes multiple audiences, learners must b

Search...  

Rule: User is a member of Any Audiences  Add  Edit  Delete  Print  Export To Excel



<input type="checkbox"/>	Audience Name ^	Membership Rule	Audience Code
<input checked="" type="checkbox"/>	 SCC Audience	Or	




  1  

2. Click **Add**

Audiences

Determine which audiences can view and register for this activity. If this list includes


Search...  

Rule: User is a member of Any Audiences  Add  Edit  Delete

<input type="checkbox"/>	Audience Name ^	Membership Rule
--------------------------	-----------------	-----------------

3. In the **Search** field, type the name for your audience and click the **Search** icon.

SumTotal

Search:  [Help](#)

Records 1

4. Click the check box beside the audience to select and click **NEXT**.

<input type="checkbox"/>	Name ^	Code	Primary Domain
<input checked="" type="checkbox"/>	All Internal SCC Emplo...	SCCEMP	SCC
<input type="checkbox"/>	All SCC & Extension, no ...		Global

5. A verification window will be displayed indicating your selected audience type. Click **OK**.

SumTotal

ADD AUDIENCES

Add audiences, check the required check boxes.

Records: 1

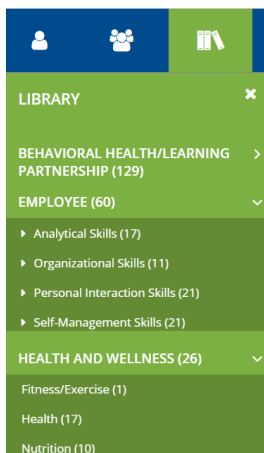
Audience Name	Visible	Register
All Internal SCC Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

BACK OK CANCEL

Management Properties

Topics

The Library Topics offer learners a structured catalogue from which to browse training in sccLearn. The library topics are accessed using the library feature and are structured by competencies as well as by department.



To add your course to the Library Topics:

1. Click **Add**.

- To view the child library topics, click the + symbol next to a parent topic.

ADD LIBRARY

To organize the item you wish to publish, browse the tree directory and locate a specific library.

<input type="checkbox"/>	Name
<input type="checkbox"/>	Topics
<input type="checkbox"/>	BEHAVIORAL HEALTH/LEARNING PARTNERSHIP
<input type="checkbox"/>	CERTIFICATIONS
<input checked="" type="checkbox"/>	Communication Skills
<input type="checkbox"/>	Conflict Resolution
<input checked="" type="checkbox"/>	Customer Service

- Select the check boxes beside **both** the parent and child topic within which to add the course. Click **OK** after selecting the topics.
- To delete a selected topic, select the check boxes beside the parent and child topic and click **Delete**.

Topics

Add this learning activity to a topic in the library, making it easy for a learner to find.

<input type="checkbox"/>	Topic ^
<input type="checkbox"/>	Communication Skills
<input type="checkbox"/>	Communication Skills > Customer Service
<input checked="" type="checkbox"/>	Computer Skills

Note:

- Contact the Ask Clara to request a new Library Topic to be configured.

Publishing

Save

Click **Save** after you have entered all information for the course.

▼ **MANAGEMENT**

Topics

Add this learning activity to a topic in the library, making it easy for a learner to find.

➕ Add
✕ Delete
🖨 Print
📄 Export To Excel
0 Selected
2 Records

Topic ^

Communication Skills

CLOSE
OPTIONAL
SAVE

Validate for Production

Click **Validate for Production** to ensure there are no errors.

VALIDATE FOR PRODUCTION
CLOSE
OPTIONAL
SAVE

A validation message will be displayed.

STAGE
PRODUCTION

[/ Learning Activities](#) / [Learning Activity Properties](#)

View Tracks
Actions

A Sample for Training

VALIDATION RESULTS

Validation results are displayed in the table below, these errors could block you from moving the activity to production. Click on the name of the error to fix them.

There are no validation errors for the activity structure.

MOVE TO PRODUCTION

Notes:

- If you see warnings and/or errors, you are encouraged to resolve the errors before proceeding. The reason for the warning/error will be provided. Clicking on the error will take you to the section in the template where you can resolve the issue.

VALIDATION RESULTS

Validation results are displayed in the table below, these errors could block you from moving the activity to production. Click on the name of the error to fix them.

Name ^	Issues
Creating a Class	⚠ The smart waiting list expiration deadline date is later than the activity start date.





- **Error Indicator:** You will not be able to move forward until the error is resolved. Contact the sccLearn Program Manager if you are unable to resolve the errors.
- **Warning Indicator:** You are required to review the warning (and resolve if possible) before moving the course to production.
- After reviewing and/or correcting the issue(s), you will need to **Validate for production** again.

Move to Production

Click **Move to Production** to publish the activity for your selected audience to see in sccLearn. A validation message will again be displayed and **Send to Stage** button will be available if you need to make edits to the course.

STAGE PRODUCTION

View Tracks Actions

A Sample for Training

Home / Learning Activities / Learning Activity Properties

VALIDATION RESULTS

Validation results are displayed in the table below, these errors could block you from moving the activity to production. Click on the name of the error to fix them.

There are no validation errors for the activity structure.

MOVE TO PRODUCTION

STAGE PRODUCTION

View Tracks Roster

A Sample for Training

Home / Learning Activities / Learning Activity Properties

Activity Successfully Moved to Production

A SAMPLE FOR TRAINING

Checklist

SEND TO STAGE

CLOSE

Notes:

- It can take up to 15 minutes after publishing the course for it to be visible in Search.
- You will only be able to create classes for the course if it has been moved to production.

Click **Close** to return to the Activity Management page in Learning Activities.

3 - Class Creation

This reference guide covers the properties related to Class Creation for Instructor Led Training (ILT) classes that take place in the physical classroom or virtually as a Webinar.

The classes are created as “Offerings of a Course, so the course must be created and published before a class can be created. There are many properties that need to be configured. For the most part they will be configured the same way for both Single and Multi-Day Classes, however where the configuration differs, it will be formatted as follows in this guide:

Configuration of Single Day Class which is started and completed within a single day will be presented in this format with the purple background and single line boarder.

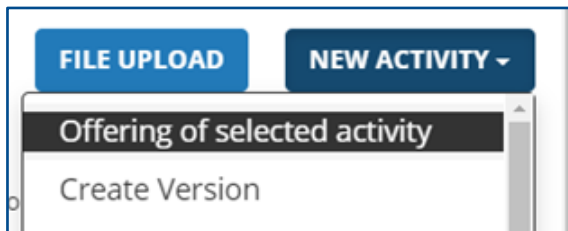
Configuration of Multi-Day Class which would be completed over the course of two or more days, so they are started on one day and end on a different day will be presented in this format with the green background and multiple line zig-zag boarder.

The properties you configured at the course level will be pre-populated when you create a class/offering for the course. The class creation template contains many property settings. Some of these settings are for features not typically used within sccLearn. Configure the properties carefully to ensure your activity functions as expected in sccLearn.

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Create New Activity

From the Activity Management page, click the radio button beside the course for which this class is being created. Click the drop-down arrow beside **NEW ACTIVITY** and select **Offering of the selected activity**.



Notes:

- Do **NOT** select *Instructor Led Class* as it may have unintended consequences.
- An offering of a Webinar Course will be created as a Webinar Class
- An offering of an Instructor Led Training Course will be created as an Instructor Led Training Class

Offering Wizard

The offering wizard provides a few initial questions to assist with creating the class before the Activity Management page is displayed.

Course Title

Confirm the correct course for which to create the offering of is selected.

OFFERING WIZARD

Create your Instructor Led Training Class. Provide time, duration, and capacity details as applicable.

Select the Course:*

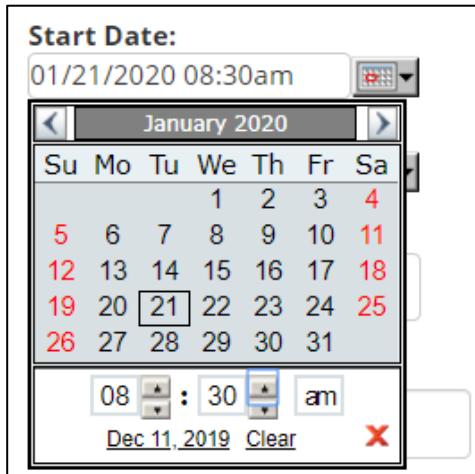
Start Date

Single Day Class:

Click the calendar to select the start date and time for the class.

Multi-Day Class:

Click the calendar to select the **start date and time of the first session of the class.**



Notes:

- To reset the date, click **Clear**.
- To close the box, click **X**.

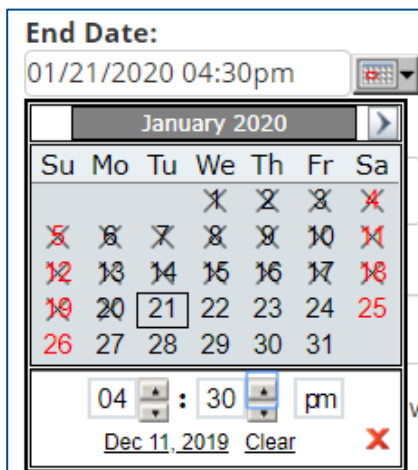
End Date

Single Day Class:

Click the calendar to select the end date and time for the class.

Multi-Day Class:

Click the calendar to select the **end date and time of the last session of the class.**



Notes:

- To reset the date, click **Clear**.
- To close the box, click **X**.

Maximum Capacity

Enter the maximum number of attendees for this class.

Maximum Capacity:

 Send notification to users who expressed an interest in this activity

Express Interest Notification

When checked, **anyone** that has **expressed interest** (at the course level for which the **Express Interest Status** was configured) will receive a notification **as soon as this class is moved to production**.

Maximum Capacity:

 Send notification to users who expressed an interest in this activity

Notes:

- This is an optional property.
- **CAUTION:** Once you move forward from this page, you will not be able to change this setting. **This is the only place where this setting is available.**

Build Offering

Click **Build Offering** to continue configuring the class.

General Properties

Name

Remove “Offering of” from the name of the class you are creating.

General

Set general information associated with your learning activity.

Name: *

Primary Domain

Confirm the Primary Domain is correct.

Primary Domain: *

BROWSE...


Activity Image

Add the activity image in a similar manner as configured for the Course Activity Image.

Activity Image:

Enter URL:

Upload Image:



EDIT **DELETE**

Description

Confirm the description is correct.

Description:

```
<p>Lorem ipsum dolor sit amet,
consectetur adipiscing elit. Maecenas
porttitor congue massa.</p>
<ul>
<li>Fusce est. Vivamus a tellus.</li>
```

Note:

- It is recommended to include when learners will receive the virtual location access details and who to contact if they have additional questions. If an existing ILT course is now being offered as a webinar, please be sure to update the existing description to include this information as well.

Owner

The Activity Owner is required to be set to your department in sccLearn for organizing, tracking, and auditing purposes.

Note:

- This property **always** defaults to the name of the administrator creating the course and **must be changed** on all activities.

To change the Owner:

- Click the **Browse** button.

Owner:

Dipti Gokani

BROWSE...


2. In the **Search** field, type **SCC-Owner** (or type in your Department's Owner Username provided to you by the sccLearn Program Manager) and click the **search icon**.

SumTotal

SELECT A USER

Follow the instructions below to search for a user.

Search: [Help](#)

scc-owner  [ADVANCED...](#)

Notes:

- Department's Owner Usernames use the naming convention:

SCC-OWNER-ASR	SCC-OWNER-LED
SCC-OWNER-CCO	SCC-OWNER-LP
SCC-OWNER-CEO	SCC-OWNER-LR
SCC-OWNER-CEPA	SCC-OWNER-OES
SCC-OWNER-CJIC-JRS	SCC-OWNER-OSEC
SCC-OWNER-CONTR	SCC-OWNER-PARKS
SCC-OWNER-EAP	SCC-OWNER-PARKS-EXT
SCC-OWNER-EO	SCC-OWNER-PHD
SCC-OWNER-EWD	SCC-OWNER-PRO
SCC-OWNER-INFOSEC	SCC-OWNER-PROC
SCC-OWNER-ISD	SCC-OWNER-RM

- Your Department's Owner Username may not appear in this table if it was created after this guide was developed.
- Contact the Ask Clara to request new Department Activity Owners to be configured.

3. Click the radio button next to your Department's Owner Username and click **OK**.

SELECT A USER

Select one user from the list below and click OK.

Search: [Help](#)

Name ▲	Username	Manager	Prim
<input checked="" type="radio"/> SCC-LED Learning Empl Development	SCC-OWNER-LED		Exter

4. Owner should now reflect your selection.

Owner:

Status

Settings **required** to be configured:

- **Active** – The course must be Active to be able to register for it.
- **Hide from search results for Learners and Managers** – Learners will be provided with the class dates during the registration process so do not need to see the classes directly.
- **Hidden from Transcript** – To avoid learner confusion, only the course will appear on the transcript.
- **Can be copied** – Allows creating additional future classes easier.

Settings **NOT** to be configured:

- **Can be subscribed** – This may be automatically checked.
- **Can be fulfilled** – This may be automatically checked.
- **Status** – Do **NOT** change this property from **None**

Status

Control the availability of this activity for use in other activity structures

- Active
- Hide from search results for Learners and Managers
- Canceled
- No registration required
- Hide in Manager mode
- Hidden from Transcript
- Can be copied
- Can be subscribed
- Can be fulfilled
- User cannot register for the individual activity

Note: If the user wishes to launch or register for this activity, they must first

Status:

None

Note:

- You may need to check/uncheck these if they are automatically configured.

User Notes

User Notes are displayed on the activity summary page (under the Notes tab) and are also emailed to the learner when they have successfully completed their registration for the class.

User notes:

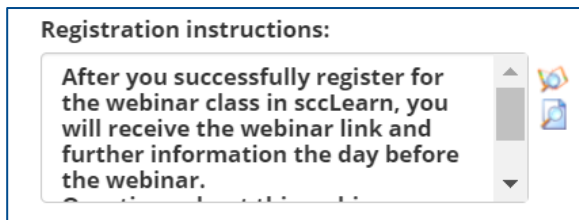
You will receive the webinar link and further information the day before the webinar. Questions about this webinar can be sent to: Dipti Gokani

Notes:

- Utilize User Notes to provide information to the learners.
- For Webinar activities this could include details of when learners will receive the virtual location access details, as well as who to contact if they have additional questions.

Registration Instructions

Registration Instructions are displayed to the learner while they are completing their registration for the class.



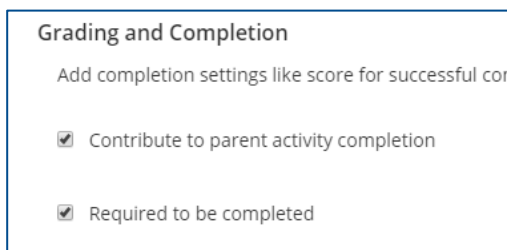
Notes:

- Utilize Registration Instructions to provide information to the learners as they register for the activity.
- For Webinar activities this could include details of when learners will receive the virtual location access details, as well as who to contact if they have additional questions.

Grading and Completion

Settings **required** to be configured:

- Contribute to parent activity completion
- Required to be completed



Estimated Duration

Enter the number of **instructional hours**.

Estimated duration: *

Hours Minutes

Note:

Note: Configuring additional properties may lead to unintended consequences.

- A class from 9:00 AM to 5:00 PM is 8 hours from start to finish, but the instructional hours would only be 7 hours if the lunch break is 1 hour.

Pick Rule

Single Day Class:

Do **NOT** configure this property.

Multi-Day Class:

Change to “Enforce number of child activities”.

Pick rule:

- Recommend number of child activities to pick
- Enforce number of child activities to pick**
- Select at least the number of child activities to pick

Registration Properties

Start Date and End Date

These dates and times will be pre-populated based on your Offering Wizard entries at the start of class creation.

Registration Deadline

Registration deadline allows learners to cancel up to this date but not after. This can be helpful if you are preparing rosters in advance.

Single Day Class:

Configure the deadline for learners to register for the class. Click the calendar to select a date. Click the time field to select a time.

Multi-Day Class:

Configure the deadline for learners to register for the class. Click the calendar to select a date. Click the time field to select a time.

The deadlines should be set prior to the first session of the class.

The screenshot shows a form with the following sections:

- Start date and time:** 1/21/2020, 8:30 AM
- End date and time:** 1/21/2020, 4:30 PM
- Registration deadline:**
 - Date: [calendar icon]
 - Days before: [input field]
- Cancellation deadline:**
 - Date: [calendar icon]
 - Days before: [input field]

A calendar for January 2020 is open, showing the date 20 (Monday) selected. The calendar grid is as follows:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01
02	03	04	05	06	07	08

Note:

- Best practice is for the registration and cancellation deadline to be the **same**.
- Contact the sccLearn Program Manager for guidance as the deadlines may differ for your programs.

Cancellation Deadline

Cancellation deadlines allow learners to cancel their registration prior to the deadline and can be useful for tracking no show learners.

Single Day Class

Configure the deadlines for learners to cancel (drop) a class. Click the calendar to select a date. Click the time field to select a time.

Multi-Day Class:

Configure the deadlines for learners to cancel (drop) a class. Click the calendar to select a date. Click the time field to select a time.

The deadlines should be set prior to the first session of the class.

Start date and time:
1/21/2020 8:30 AM

End date and time:
1/21/2020 4:30 PM

Registration deadline :

Date:
[] []

Days before:
[]

Cancelation d

Date:
[] []

Days before:
[]

January 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Mon-Fri)
29	30	31	01	02	03	04	
05	06	07	08	09	10	11	
12	13	14	15	16	17	18	
19	20	21	22	23	24	25	
26	27	28	29	30	31	01	Mon-Fri)
02	03	04	05	06	07	08	

Note:

- Best practice is for the registration and cancelation deadline to be the **same**.
- Contact the sccLearn Program Manager for guidance as the deadlines may differ for your programs.

Availability

Settings **required** to be configured:

- **Open for Registration**
- **Allow one click registration**

Availability

Set the capacity of the activity, approvals, registration rights, and dates to

Open for registration

Allow one click registration

Minimum Capacity

Enter the Minimum capacity.

Minimum capacity:
<input type="text" value="14"/>
Maximum capacity:
<input type="text" value="30"/>

Note:

- The Maximum Capacity will be pre-populated from the offering wizard page.

Waitlist Threshold

Enter a threshold number value if you will be configuring a waitlist and would like a notification sent to the **Activity Owner** (configured for this class) when the number has been met. Leave this field empty if there is no threshold.

Waitlist Threshold:
<input type="text"/>

Notes:

- This is an optional property.
- The threshold is **not** a maximum number for the waitlist. The threshold is **only** for sending a notification to the Activity Owner to help manage when new classes may need to be created.
- Learners will continue to be added to the waitlist list until the registration deadline passes even if the class is full.
- The threshold notification is not sent automatically to Activity Owners.
- Contact the sccLearn Program Manager to request the notification to be configured.

Audiences

Audiences will be pre-populated based on the course audience type.

Audiences

Audiences that can view and/or register for this activity. If this list includes multiple audiences, learners must belong to every audience Membership Rule to view the activity.

Search...

Rule: User is a member of Audiences

<input type="checkbox"/>	Audience Name ^	Membership Rule	Audience Code
<input type="checkbox"/>	<input type="button" value="i"/> SCC Audience	And	

Notes:

- Class audiences can be more restrictive than the courses.
- Select only one audience type.
- Contact the sccLearn Program Manager if you would like to use a more restrictive or different audience type for the class.

Completion of Configuration



The remaining properties to be configured differs considerably between Single Day Classes and Multi-Day Classes. A summary of the differences is provided as well as page numbers for how to continue with your configuration.

For both classes you will need to configure the Waitlist information and publish the class(es). These steps are almost the same and **must** be completed.

Note:

- Pay close attention to the remaining properties to configure the class correctly.

Single Day Class:

High level configuration still required:

- ✓ **Error! Reference source not found.**
- ✓ Waiting List Properties

✓ Publish

Multi-Day Class (Instructions begin on page 41):

High level configuration still required:

- ✓ Multi-day class Session 1
- ✓ Multi-day class Additional Sessions
- ✓ Waiting List Properties
- ✓ Publish

Single Day Class Resources

Instructors

Instructor scheduling is based on the instructors configured within sccLearn.

Note:

- Confirm the instructor prior to associating them with the class. sccLearn **does not connect** with Outlook or any external system to coordinate with calendars or booking systems.

1. Click **Add** to select an instructor to be associated with the activity and click **Next** to **Select Instructor** to select an instructor .

Instructors

Select instructors that are qualified and/or responsible for teaching this activity.

Search...

<input type="checkbox"/>	Instructor Name ^	Qualified	Responsible
--------------------------	-------------------	-----------	-------------

2. Type in the name of the instructor and click the **Search** icon.

SELECT INSTRUCTOR

Select one or more users from the list below and click Next.

Search: Help

3. Click the selection box beside the instructor name and click **NEXT**.

SELECT INSTRUCTOR

Select one or more users from the list below and click Next.

Search: Help

Selected Items: 1 | Records: 1

<input type="checkbox"/>	Name	Username	Manager	Primary Domain	Primary Job	Primary Organization	Status	Availability
<input checked="" type="checkbox"/>	Miriam Vargas-Padilla	59963		SCC	TRAINING & STAFF DE...	COUNTY EXECUTIVE	Active	Available

Note:

- Contact the Ask Clara if your desired instructor is not configured or if you would like to request a generic instructor be configured for your classes.

4. Click **OK** to add the selected instructor.

ADD ACTIVITY INSTRUCTORS

Specify whether you want the selected instructor(s) to be qualified and/or responsible for this activity. Click OK to continue.

Instructor Name	Qualified	Responsible
Miriam Vargas-Padilla	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5. Confirm the Instructor is added without conflicts.

Instructors

Select instructors that are qualified and/or responsible for teaching this activity.

Search... View: All Instructors

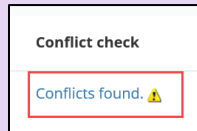
0 Selected 1 Records

<input type="checkbox"/>	Instruc...	Qualified	Respon...	Conflict check	Status	CE Cre...	Credits...
<input type="checkbox"/>	Miriam ...	Yes	Yes	No conflicts found.	Approved		No

1 - 1 of 1 items

Note:

- If the selected instructor is scheduled for another class in sccLearn at the same time, you will see the Conflicts Found warning message.
1. Click the **Conflicts Found** warning message to view the Conflict Check Results page.



2. Once you have read and resolved the issues, click **OK**. You can delete the resource, add a new resource, or continue with the conflict in place.

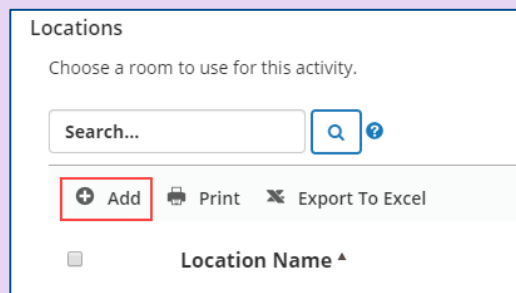
Locations

Location scheduling is based on the locations configured within sccLearn. The location is sent to the learner with the registration email.

Notes:

- Confirm the location prior to associating it with the class. sccLearn does not connect with Outlook or any external system to coordinate with calendars or booking systems.

1. Click **Add** to select a location to be associated with the activity.



2. In the search field, type in the name of the location and click the Search icon. Click the selection box beside the location name and click **OK**.

SELECT LOCATION
Select one or more resources from the list below, then click OK

Search: [Help](#)

Selected Items:

<input type="checkbox"/> Location Name ^	Primary domain	Facility	City	State	Country
<input type="checkbox"/> SCC Charcot: Birch	SCC	SCC: 2310 N 1S...	San Jose	CA	USA
<input type="checkbox"/> SCC Charcot: Manzanita	SCC	SCC: 2310 N 1S...	San Jose	CA	USA
<input checked="" type="checkbox"/> SCC Charcot: TC1	SCC	SCC: 2310 N 1S...	San Jose	CA	USA

Notes:

- Search for the Virtual locations if you are creating a webinar class.
- Contact the Ask Clara to request new locations to be configured.

3. Confirm the location is added without conflicts.

Locations
Choose a room to use for this activity.

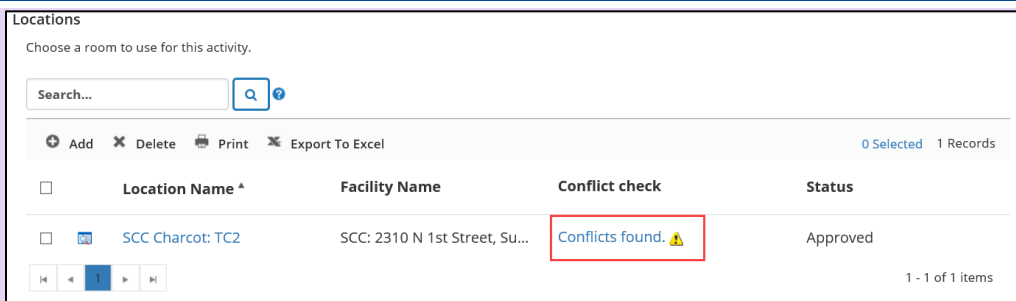
Search...

<input type="checkbox"/> Location Name ^	Facility Name	Conflict check
<input checked="" type="checkbox"/> SCC Charcot: TC1	SCC: 2310 N 1st Street, Suite 102; San Jose ...	No conflicts found.

Notes:

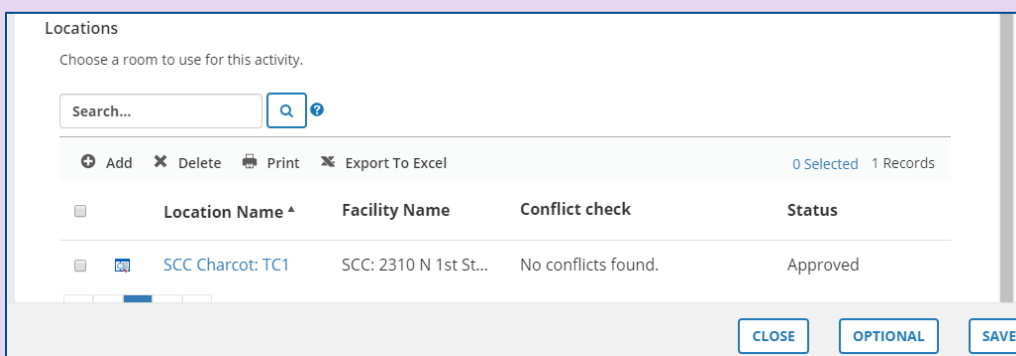
If the selected resource is scheduled for another class in sccLearn at the same time, you will see the Conflicts Found warning message.

1. Click the **Conflicts Found** warning message to view the Conflict Check Results page.
2. Once you have read and resolved the issues, click **OK**. You can delete the resource, add a new resource, or continue with the conflict in place.



Save

Click **SAVE** at the lower right of the window before configuring waitlist information.

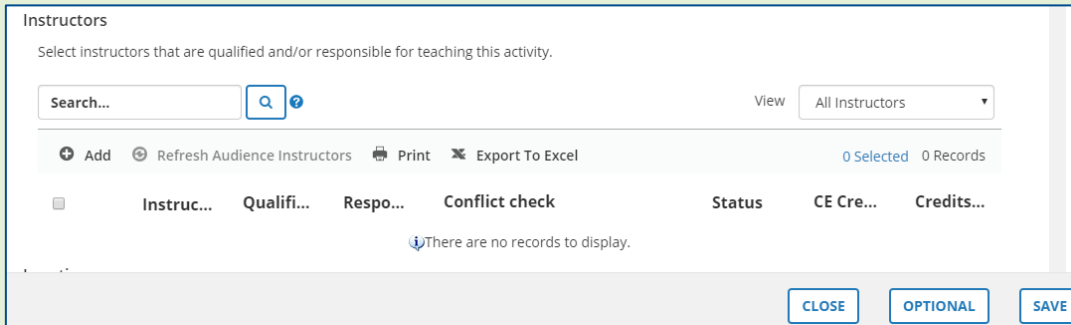


Waiting List Properties

Configure [Waiting List Properties](#) which apply to all classes on page 52.

Multi-Day Class General Properties (Session 1)

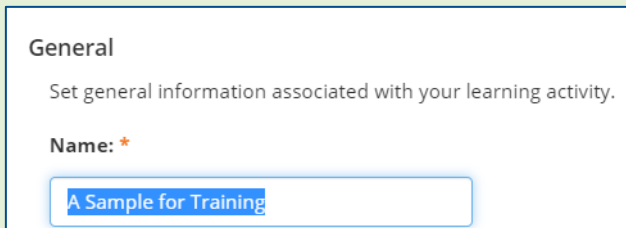
Save



Click **SAVE** at the lower right of the window before configuring each session.

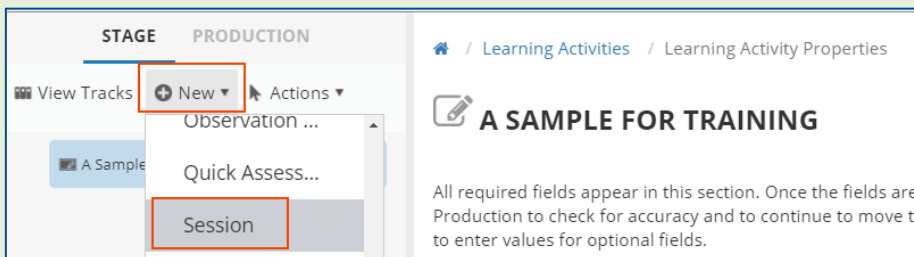
Name

Copy the **Class Name** to be consistent for naming the sessions.



Create New Session

Click the **New** drop-down and select **Session**.



Name

Paste the class name into the Name field with a session identifier such as **Day 1 – A Sample for Training, A Sample for Training (2/27/20)** or if you had 6 sessions for the class, you could use **A Sample for Training (1/6)** for the first session.

The screenshot shows the 'Learning Activity Properties' configuration page. The 'Name' field is highlighted with a blue border and contains the text 'NewActivity_20191202'. The page title is 'NEWACTIVITY_20191202' and the breadcrumb is 'Learning Activities / Learning Activity Properties'. The 'Name' field is labeled 'Name: *' and has a red asterisk indicating a required field.

Owner

Configure the Activity Owner in a similar manner as completed for the parent class.

Estimated Duration

Enter the duration for the **actual** session.

The screenshot shows the 'Estimated duration' configuration form. The 'Hours' field is set to 3 and the 'Minutes' field is set to 30. The form is labeled 'Estimated duration: *' and has a red asterisk indicating a required field.


Note:


- If this session of a 2 day class, was taught for 3.5 hours for a total class duration of 7 hours, the duration for this session would be 3:30.

Multi-Day Class Schedule Properties (Session 1)


Start Date and End Date

Add the dates and times for the **first** session.

Start date and time:
1/28/2020  8:30 AM


End date and time:
1/28/2020  12:00 PM

Registration deadline :

Date:
1/27/2020  12:00 PM

Days before start date:
 Only business days (Mon-Fri)

Cancellation deadline:

Date:
1/27/2020  12:00 PM

Days before start date:
 Only business days (Mon-Fri)

Registration and Cancellation Deadlines

Confirm that the pre-populated dates are consistent with the dates you entered at the parent class level.

Multi-Day Class Resource Properties (Session 1)

Instructors

Instructor scheduling is based on the instructors configured within sccLearn.

Note:

- Confirm the instructor prior to associating them with the class. scLearn **does not connect** with Outlook or any external system to coordinate with calendars or booking systems.

1. Click **Add** to select an instructor to be associated with the activity and click **Next to Select Instructor** to select an instructor .

Instructors

Select instructors that are qualified and/or responsible for teaching this activity.

Search... [Search Icon] [Help Icon]

[Add] [Refresh Audience Instructors] [Print] [Export To Excel]

Instructor Name ^	Qualified	Responsible
-------------------	-----------	-------------

2. Type in the name of the instructor and click the **Search** icon.

SELECT INSTRUCTOR

Select one or more users from the list below and click Next.

Search: [miriam] [Help] [Search Icon] [ADVANCED...]

3. Click the selection box beside the instructor name and click **NEXT**.

SELECT INSTRUCTOR

Select one or more users from the list below and click Next.

Search: [miriam] [Help] [Search Icon] [ADVANCED...]

Selected Items: 1 | Records: 1

Name ^	Username	Manager	Primary Domain	Primary Job	Primary Organization	Status	Availability
<input checked="" type="checkbox"/> Miriam Vargas-Padilla	59963		SCC	TRAINING & STAFF DE...	COUNTY EXECUTIVE	Active	Available

[VIEW IN CALENDAR] [NEXT] [CANCEL]

Note:

- Contact the Ask Clara if your desired instructor is not configured or if you would like to request a generic instructor be configured for your classes.

4. Click **OK** to add the selected instructor.

ADD ACTIVITY INSTRUCTORS

Specify whether you want the selected instructor(s) to be qualified and/or responsible for this activity. Click OK to continue.

Instructor Name	Qualified	Responsible
Miriam Vargas-Padilla	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5. Confirm the Instructor is added without conflicts.

Instructors

Select instructors that are qualified and/or responsible for teaching this activity.

Search...

View:

0 Selected 1 Records

<input type="checkbox"/>	Instruc...	Qualified	Respon...	Conflict check	Status	CE Cre...	Credits...
<input type="checkbox"/>	Miriam ...	Yes	Yes	No conflicts found.	Approved		No

1 - 1 of 1 items

Notes:

- If there is a conflict with an instructor, you will see the “Conflicts Found” warning.
1. Click the Conflicts Found warning message to view the Conflict Check Results page.
 2. Once you have read and resolved the issues, click OK.
 3. You can delete the resource, add a new resource, or continue with the conflict in place.

Locations

Location scheduling is based on the locations configured within sccLearn. The location is sent to the learner with the registration email.

Note:

- Confirm the location prior to associating it with the class. sccLearn **does not connect** with Outlook or any external system to coordinate with calendars or booking systems.

1. Click **Add** to select a location to be associated with the activity.

Locations

Choose a room to use for this activity.

Search...

Print Export To Excel

<input type="checkbox"/>	Location Name ^
--------------------------	-----------------

2. At the search field, type in the name of the location and click the Search icon. Click the selection box beside the location name and click **OK**.

SELECT LOCATION

Select one or more resources from the list below, then click OK

Search: [Help](#)

Selected Items:

<input type="checkbox"/>	Location Name ^	Primary domain	Facility	City	State	Country
<input type="checkbox"/>	SCC Charcot: Birch	SCC	SCC: 2310 N 1s...	San Jose	CA	USA
<input type="checkbox"/>	SCC Charcot: Manzanita	SCC	SCC: 2310 N 1s...	San Jose	CA	USA
<input checked="" type="checkbox"/>	SCC Charcot: TC1	SCC	SCC: 2310 N 1s...	San Jose	CA	USA

Notes:

- Search for the Virtual locations if you are creating a webinar class.
- Contact the Ask Clara to request new locations to be configured.

3. Confirm the location is added without conflicts.

Locations

Choose a room to use for this activity.

Search...

Print Export To Excel

<input type="checkbox"/>	Location Name ^	Facility Name	Conflict check
<input checked="" type="checkbox"/>	SCC Charcot: TC1	SCC: 2310 N 1st Street, Suite 102; San Jose ...	No conflicts found.

Notes:

- If there is a conflict with a resource, you will see the “Conflicts Found” warning.
1. Click the **Conflicts Found** warning message to read and resolve the issues.
 2. You can delete the resource, add a new resource, or move on with the conflict in place.

Locations

Choose a room to use for this activity.

Search...

0 Selected 1 Records

<input type="checkbox"/>	Location Name ^	Facility Name	Conflict check	Status
<input type="checkbox"/>	SCC Charcot: TC2	SCC: 2310 N 1st Street, Su...	Conflicts found.	Approved

1 - 1 of 1 items

Note:

- Contact the Ask Clara to request new locations to be configured.

Save

Click **SAVE** at the lower right of the window before configuring each session.

Instructors

Select instructors that are qualified and/or responsible for teaching this activity.

Search... View

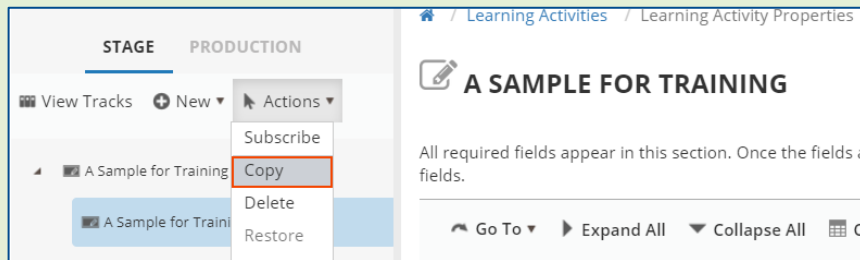
0 Selected 0 Records

<input type="checkbox"/>	Instruc...	Qualifi...	Respo...	Conflict check	Status	CE Cre...	Credits...
⬇ There are no records to display.							

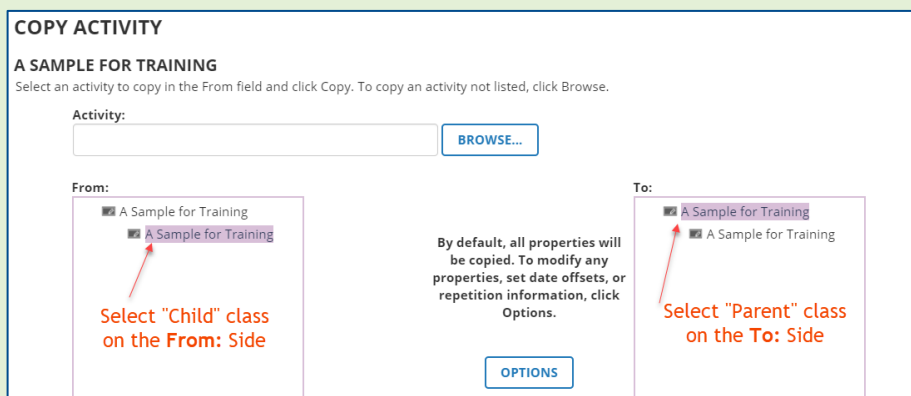
Multi-Day Class Additional Sessions (2+)

Copy Session 1

1. Scroll to the top of the page and highlight the session just created. Click the **Actions** drop-down and select **Copy**.

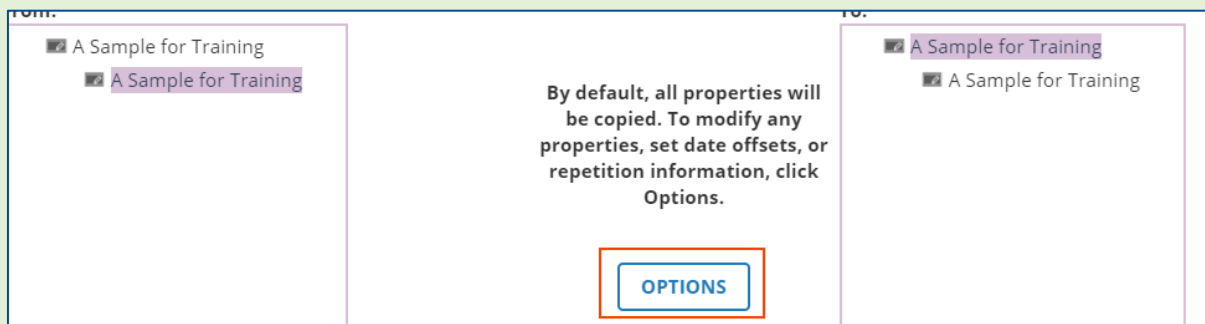


2. Click the **“child”** class on the **“From:”** side of the selection and the **“parent”** class on the **“To:”** side of the selection



Configure Options

1. Click **OPTIONS**.



2. Select **Offset the dates and times relative to** radio button. Select the date and time of the next session.

DATES

Keep same dates and times
 Offset dates and times by:
 Days Hours Minutes

Offset dates and times relative to:
 America/Los Angeles

NUMBER OF COPIES

Make the following number of copies:

Offset dates and times relative to:

01/29/2020 08:30am

January 2020						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

08 : 30 am

Dec 11, 2019 Clear

3. Select the **Number of Copies**: Enter the number 1 to make one copy of the session.

NUMBER OF COPIES

Make the following number of copies:

Notes:

- Offset dates and times by can be helpful if the class has three or more sessions, and only if those sessions have a regular cadence, such as every Wednesday for three or more weeks or three or more consecutive days. However, if it is an irregular cadence, such as Monday and Wednesday of week one and Friday of week three, you will need to copy each session individually.
- Do **NOT** make any changes to any of the pre-selected properties.

4. Click **OK** to return to the **Copy Activity** window followed by **COPY >>>** to create the copy and **Close**.

From:

- A Sample for Training
- A Sample for Training

To:

- A Sample for Training
- A Sample for Training

By default, all properties will be copied. To modify any properties, set date offsets, or repetition information, click Options.

OPTIONS

COPY >>>

CLOSE

Multi-Day Class General Properties (Session 2+)

Configure these additional session General Properties in a similar manner as configured for the First Session General Properties:

Name

Owner

Estimated Duration

Multi-Day Class Schedule Properties (Session 2+)

Start Date & End Date

These dates will be pre-populated based on the Offset date you selected during the copy. Confirm that the dates are correct for the session.

Start date and time:

1/29/2020 8:30 AM

End date and time:

1/29/2020 12:00 PM

Registration & Cancelation Deadlines

Update both these deadlines to reflect the dates entered for the **class and the first session**.

Registration deadline :

Date:
1/27/2020 12:00 PM

Days before start date:
 Only business days (Mon-Fri)

Cancelation deadline:

Date:
1/27/2020 12:00 PM

Multi-Day Class Resource Properties (Session 2+)

Configure these additional session Resource Properties and save the additional session in a similar manner as configured for the First Session Resource Properties:

[Multi-Day Class Resource Properties \(Session 1\)](#)

[Instructors](#)

[Locations](#)

[Save](#)

Note:

- Configure [Multi-Day Class Additional Sessions \(2+\)](#) as needed or continue to configure [Waiting List Properties](#)

Waiting List Properties

View Tracks

In the upper left corner of the Learning Activities Properties page, click **View Tracks**, then select **Waiting List**

The first screenshot shows the 'STAGE' tab selected in the top navigation. In the upper left corner, the 'View Tracks' button is highlighted with a red box. Below it is a blue button labeled 'A Sample for Training'. The main content area on the right is titled 'A SAMPLE FOR TRAINING' and contains the text: 'All required fields appear in this section. Once the fields are filled.' The breadcrumb path is '/ Learning Activities / Learning Activity Properties'.

The second screenshot shows the same page, but the 'View Activities' button is now selected in the top navigation. The 'A Sample for Training' button is still present. The main content area on the right is titled 'A SAMPLE FOR TRAINING' and contains the text: 'Create or modify track properties from this page. Tracks allow different properties to tracks which will be used during learner registration.' Below this text is a section titled 'PROPERTIES' with a dropdown arrow. Underneath, there are four tabs: 'General', 'Costs', 'Waiting List', and 'Translated Properties'. The 'Waiting List' tab is highlighted with a red box.

Waiting List Type

The wait list is populated once the maximum capacity for the class is reached. If a learner drops the class, the seat would be offered to learners on the wait list.

General Costs **Waiting List** Translated ...

Complete the information as needed to finish.

Waiting list type:

Standard

None

Standard

Smart

Smart waiting list hold time (hours): *

There are three different types of wait lists.

- **None** – There is no waitlist established. When the class is full, no additional registrations are allowed unless a learner drops the class.
- **Standard** – **DO NOT USE.**
- **Smart** – When a learner drops a class and a seat becomes available, the class seat will be offered to the first learner on the wait list allowing them an allotted amount of time to accept the seat. If not accepted, the seat would be offered to the next learner on the list, and so on. If you select the Smart wait list, you will need to enter the date and time to stop sending out notifications. The hold time represents the number of hours during which the learner can accept the offered seat before it is offered to another learner.

||| **Notes:** |||

- Choose either **Smart** or **None** for the waitlist.
- Do **NOT** select Standard as it will not function as expected.

Smart Waiting List Expiration Date

Enter the date and time for the list to expire.

Notes:

- This property is only available for Smart Waiting lists.
- The best practice is to set the Smart waiting list expiration date/time the same as registration deadline date/time.

Smart Waiting List Hold Time

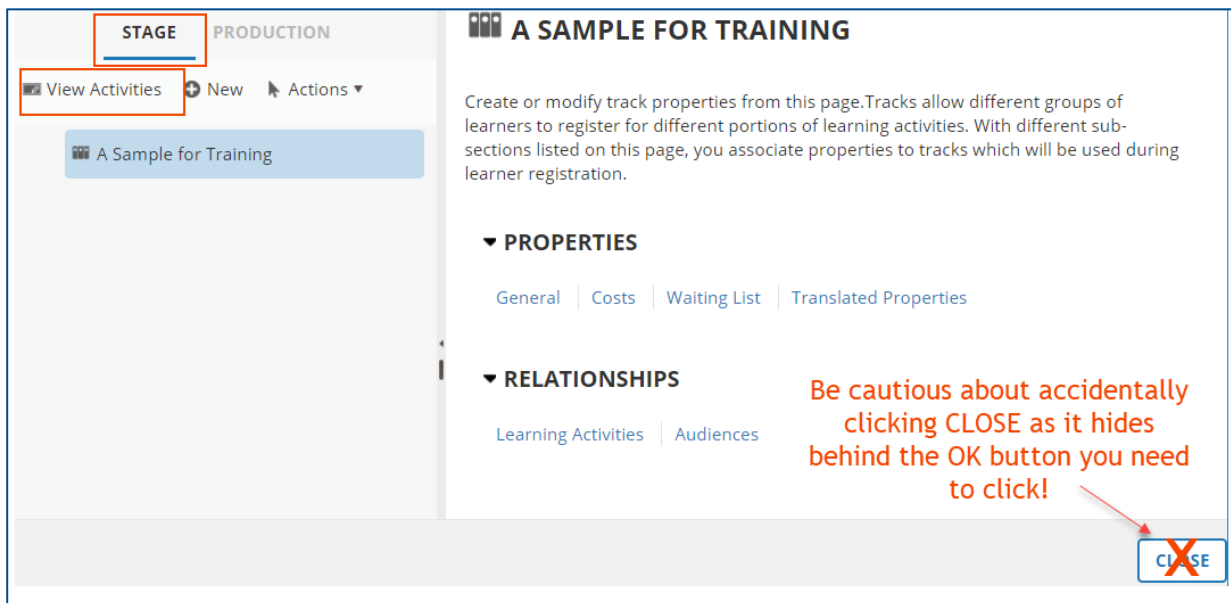
Enter the number of hours during which the learner can accept the offered seat.

Notes:

- This property is only available for Smart Waiting lists.
- The hold time is recommended to be set to 72 hours to allow for evenings and weekends.

Save Waiting List

Click **OK** to save the waiting list information. You will be returned to the **View Tracks** main page. Click **View Activities**.



Note:

- If you accidentally click CLOSE, you will be returned to the Learning Activities page.
- To continue with the validation process, you will need to search for the class you are creating and click the **EDIT** button to open it again.

Publish

Validate for Production

Click **Validate for Production** to ensure there are no errors and you have entered all necessary details for your class. A validation message will be displayed.




Notes:

- If you see warnings and/or errors, you are encouraged to resolve the errors before proceeding. The reason for the warning/error will be provided. Clicking on the error will take you to the section in the template where you can resolve the issue.

VALIDATION RESULTS

Validation results are displayed in the table below, these errors could block you from moving the activity to production. Click on the name of the error to fix them.

Name ^	Issues
Creating a Class	 The smart waiting list expiration deadline date is later than the activity start date.



- **Error Indicator:** You will not be able to move forward until the error is resolved.



- **Warning Indicator:** You are required to review the warning (and resolve if possible) before moving the course to production.
- After reviewing and/or correcting the issue(s), you will need to **Validate for production** again.

Move to Production

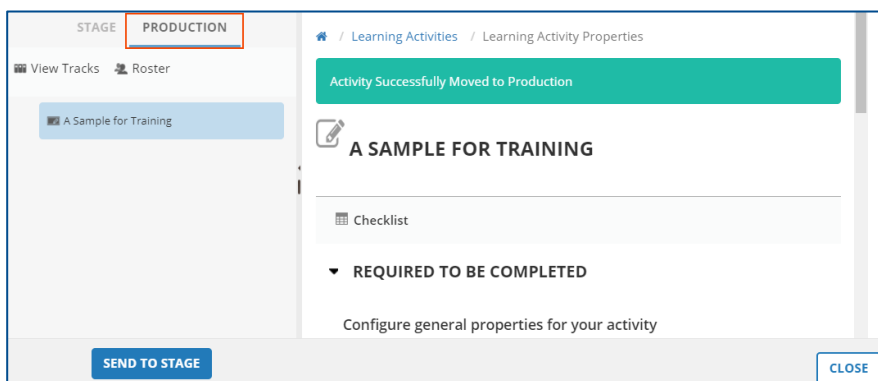
Considerations Before Proceeding:

- Moving to Production will **open the class for registration**.

Instructor Led Training Activity Management Guide

- If you are NOT ready to launch the class, leave the class in Stage until you are ready to move to production.
- An email confirmation notification will be sent out to the mailbox of the Activity Owner identified for the class.
- If you selected the option to send the Express Interest notification, a notification message will be sent to everyone that has Expressed Interest in the course.

Click **Move to Production** to publish the activity for your selected audience to see in sccLearn. A validation message will again be displayed
Click **Close** to return to the Activity Management page in Learning Activities.



4 - Pre-Class Roster Management

The roster displays the list of all learners registered, canceled, or wait listed for an activity.

Pre-class activities include all the roster related activities you may need to complete prior to the class date. These include:

- Viewing the class roster
- Registering learners to the class or the waiting list
- Canceling (or drop) learners from the class
- Exporting learner names to Excel
- Printing the Roster
- Emailing learners

You are highly encouraged to complete the Orientation to sccLearn Administration web based training AND practice the activities in this guide in the sccLearn Sandbox System (<https://scclearn.stage.sumtotal.host>) to become familiar with the tasks before working in the production sccLearn system (<https://scclearn.sccgov.org>)

View Instructor Led Training (ILT) Class Roster

The roster displays the list of all learners registered, canceled, or wait listed for an activity. Refer to the Orientation to Administration Training for how to navigate the Roster Management page.

Registered, Canceled, and Attended Learners

Completion Information view displays learners with **Registered, Canceled, and Attended** status.

The screenshot shows the 'ACTIVITY ROSTER' page for 'A SAMPLE FOR TRAINING (2/4/2020 - 2/4/2020)'. It includes details for Activity Type, Code, Location, Instructor, and Vendor. A search bar is present with a 'View:' dropdown menu highlighted in red, currently set to 'Completion information'. Below the search bar is a table with columns: Name, Username, Status, Status Date, Score, Duration (Hrs, Min), Passed, Completed, and Signature Status. The table lists three registered learners. At the bottom, there are buttons for OK, CANCEL, APPLY, APPLY TO ALL, and SEND E-MAIL.

Waiting List Learners

Change the view from **Completion Information** to **Waiting List**.

This screenshot shows a close-up of the 'View:' dropdown menu. The menu is open, showing options: 'Completion information', 'Completion information by date', 'Other notes', 'Additional costs', 'Waiting list' (highlighted in blue), 'Approvals: Pending', 'Approvals: Approved', 'Approvals: Rejected', 'Pending Signatures', and 'Express interest'. The background shows the 'Filter by Status:' dropdown set to 'All' and the 'View:' label.

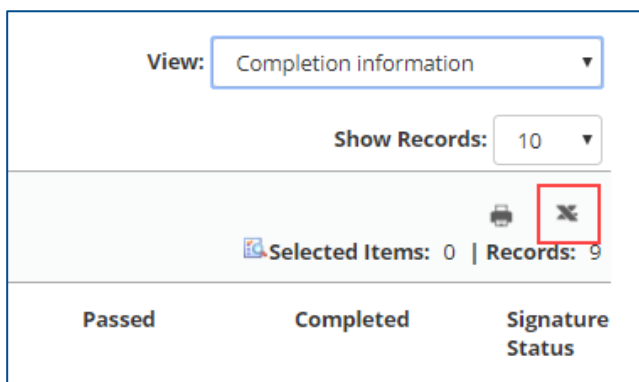
Export Learner Names

Exporting the learner names to Excel allows you to prepare customized rosters and manipulate/analyze the data.

Notes:

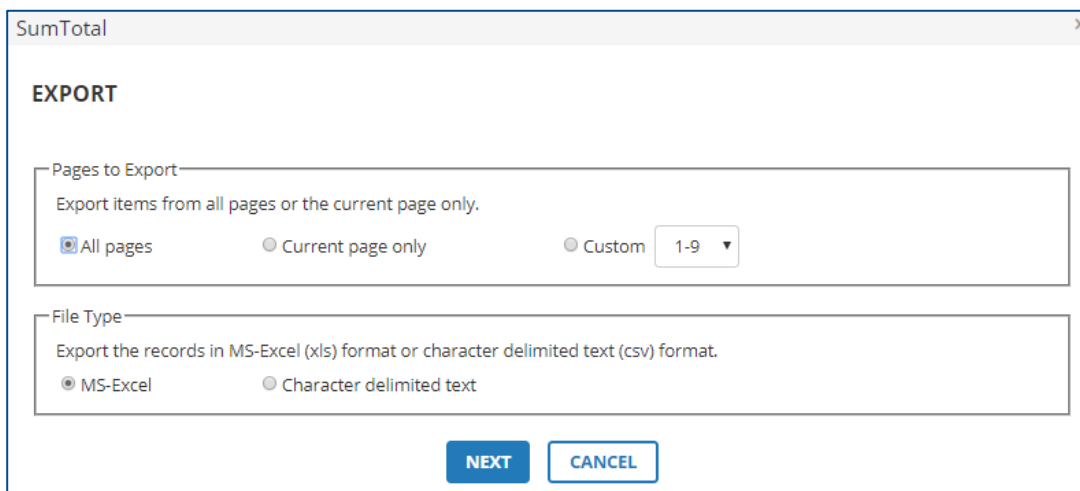
- Exporting learner names can also be performed after class completion for post-class activities such as follow-up questions.
- Exporting learner names for the course will display learners from all classes associated with the course.

1. To export the list of learners in the **current** view of the roster, click the **Export** icon.



The screenshot shows a control panel for the roster. At the top, there is a 'View:' dropdown menu set to 'Completion information'. Below it is a 'Show Records:' dropdown menu set to '10'. In the center, there is a toolbar with a printer icon and a red square highlighting an 'Export' icon (a document with an 'X'). Below the toolbar, it says 'Selected Items: 0 | Records: 9'. At the bottom, there are three columns: 'Passed', 'Completed', and 'Signature Status'.

2. Click **Next** to Export **All pages** to Microsoft Excel.

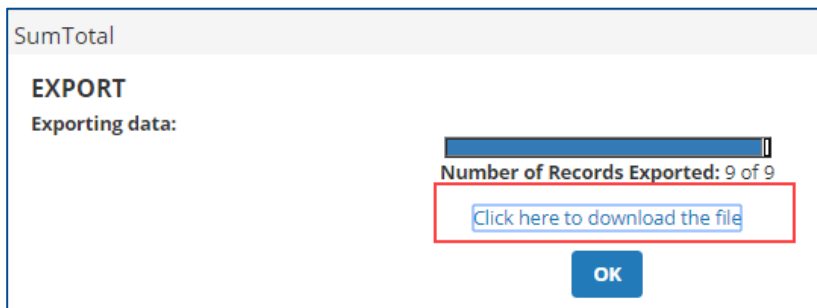


The screenshot shows a dialog box titled 'SumTotal' with the following options:

- EXPORT**
- Pages to Export**: Export items from all pages or the current page only.
 - All pages
 - Current page only
 - Custom 1-9
- File Type**: Export the records in MS-Excel (xls) format or character delimited text (csv) format.
 - MS-Excel
 - Character delimited text
- NEXT** and **CANCEL** buttons.

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- Download the file using the **Click here to download the file** hyperlink. Once downloaded, you can open the file using Excel. Click **OK** to close this window.



- The excel file will display the details for the selected activity.

Name	E-mail Address	User name	Primary Job	Primary Domain	Primary Org. Name	Org. Code	Org. Contact Phone #	Status	Status Date
	null@sumtotalsystems			SCC	SANTA CLARA	921		Registered	5/22/2020
	null@sumtotalsystems			SCC	SANTA CLARA	921		Canceled	5/22/2020
	null@sumtotalsystems			SCC	SANTA CLARA	921		Registered	5/22/2020
	null@sumtotalsystems			SCC	PUBLIC DEFENDER	204		Registered	5/22/2020

Note:

- The excel file will contain the following information for each learner (based on data available):

Name	E-mail Address	Username
Primary Job	Primary Domain	Primary Org. Name
Org. Code	Org. Contact Phone #	Status
Status Date	Score	Duration (Hrs/Min)
Passed	Completed	Signature Status
Approved by Manager	Enrolled by Position	User Code

Add Learners to Class Roster or Wait List

Typically, learners self-register for a class before attending. When the class waiting list is configured properly, learners are placed on the waiting list if the class is full when they register. sccLearn will automatically notify wait listed learners when an open seat is available. The learner will be moved onto the roster if they accept the offered seat. However, there may be instances where a learner is unable to register or attends as a walk-in learner. As an administrator, you can add learners to the waiting list *before* the completion of a class or to the roster before *and* after the completion of the class.

1. Click **Add**.

The screenshot shows a search interface with a text input field, a search icon, and an 'ADVANCED...' button. Below the search area, there are three buttons: 'Add', 'Remove', and 'Unlock'. The 'Add' button is highlighted with a red rectangular box.

2. Click **Continue** at the **BATCH REGISTRATION** window.

The screenshot shows a 'BATCH REGISTRATION' window titled 'A SAMPLE FOR TRAINING'. It features a 'Select Activities' dropdown menu with a search icon. Below the dropdown, the 'Available Capacity' is shown as 30. A list of activities is displayed, with one activity selected and highlighted by a red box: 'Instructor Led Training Class : A Sample for Training*' with details: 'Tuesday, February 4, 2020' and '8:30 AM PST - 4:30 PM PST'. To the right of the activity list, there is a section for 'Available Capacity: 30' and 'Registration deadline: Monday, February 3, 2020' and 'Cancellation deadline: Monday, February 3, 2020'. Below the activity list, there is a note: 'Activities marked with an asterisk (*) are required activities.' At the bottom right, there are three buttons: 'CONTINUE', 'CANCEL', and 'SUBMIT', with 'SUBMIT' and 'RESET' also visible.

Note:

- A registration deadline warning notification will be displayed for a class in the past.

Multi-Day Class:

All sessions will be displayed for Multi-Day Class rosters. You should **not be able** to uncheck any of the sessions.

CREATING A MULTI-DAY CLASS

Select Activities

Available Capacity: 30

Instructor Led Training Class : Creating a Multi-Day Class*
Tuesday, December 10, 2019 8:30 AM PST -
Wednesday, December 11, 2019 12:30 PM PST

Registration deadline: Monday, December 2, 2019
Cancellation deadline: Monday, December 2, 2019

Required: All

Session : Creating a Multi-Day Class*
Registration deadline Monday, December 9, 2019 has passed

SCC Charcot: TC1 - SCC: 2310 N
1st Street, Suite 102; San Jose
95131
San Jose, CA, USA

Registration deadline: Monday, December 9, 2019
Cancellation deadline: Monday, December 9, 2019

Session : Creating a Multi-Day Class*
Wednesday, December 11, 2019
8:30 AM PST - 12:30 PM PST

SCC Charcot: TC1 - SCC: 2310 N
1st Street, Suite 102; San Jose
95131
San Jose, CA, USA

Registration deadline: Monday, December 9, 2019
Cancellation deadline: Monday, December 9, 2019

Activities marked with an asterisk (*) are required activities.

3. Click **Add** to select learners followed by **NEXT** to **Select Viewable Users**

AVAILABLE USERS

Available seats: 30
Selected users: 0
Available users: 0
Users not in allocation: 0

Add Select All Clear All

Name	Status
------	--------

Note:

- Do **NOT** select learners using a different option as it may lead to unintended consequences.

4. Use the **Search** or **Advanced Search** feature to search for learner names. Select the check box beside the learner name. Click **OK** once all names have been selected.

SELECT USERS

Select one or more users from the list below and click OK.

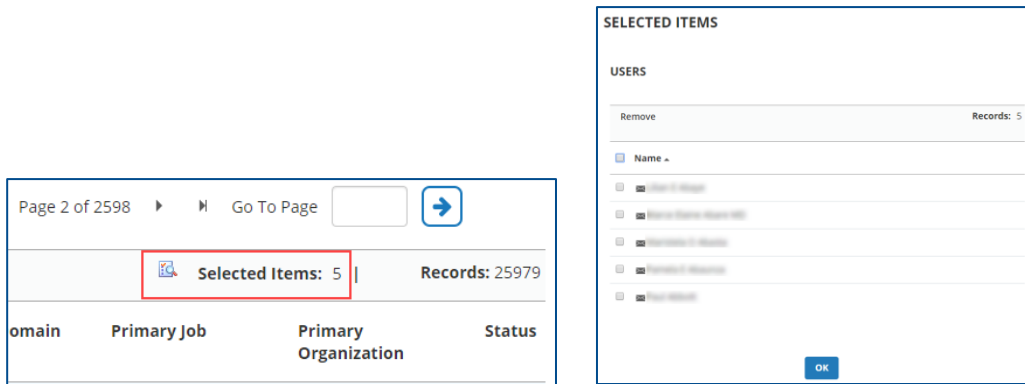
Search: Help Records 1-10 of 25983 Page 1 of 2599 Go To Page

Selected Items: 0 | Records: 25983

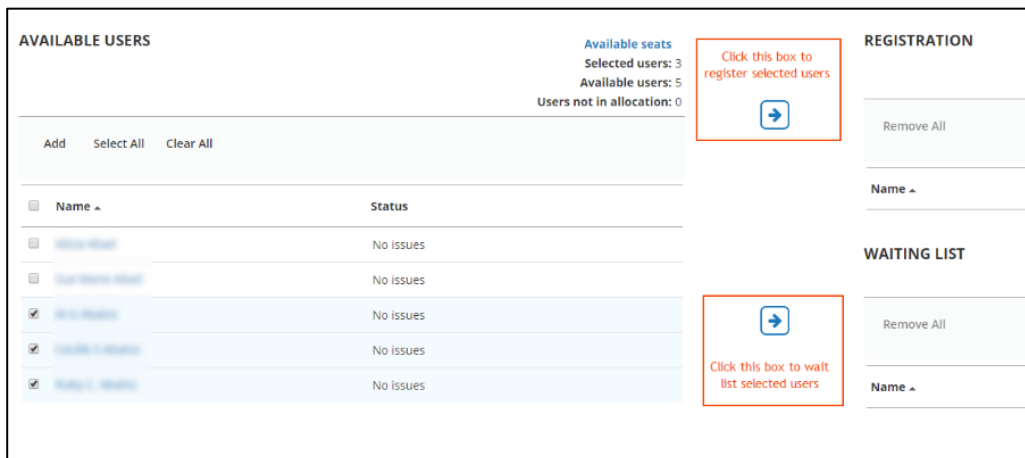
<input type="checkbox"/>	Name	Username	Manager	Primary Domain	Primary Job	Primary Organization	Status
<input checked="" type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Notes:

- You can search for and add multiple learners at this step.
- Verify the number of learners against the **Selected Items** indicator and/or confirm names by clicking the icon to the left of the **Selected Items** indicator. Click **OK** to close the selected items window.



5. Select the check box beside the learner(s) name you wish to add. To **register** learners, click the **top** blue arrow. To add learners to the **waiting list**, click the **lower** blue arrow.



Note:

- The system will allow you to add learners to the waiting list even if the class is not full. This is not advised. It will force the learner to go through unnecessary steps to add themselves to the roster.

6. Click **SUBMIT** to confirm the selections.

The screenshot shows a web interface for user registration. On the left, the 'AVAILABLE USERS' section has a table with columns for 'Name' and 'Status'. Above the table are buttons for 'Add', 'Select All', and 'Clear All'. On the right, the 'REGISTRATION' section has a 'Remove All' button and a list of users with checkboxes. Below this is a 'WAITING LIST' section with another 'Remove All' button and a list of users. At the bottom right, there are 'CANCEL', 'SUBMIT', and 'RESET' buttons.

Notes:

- Once you add a learner to the roster, sccLearn will send them a registration notification.
- If there are no available seats for the class, a warning box will appear indicating: *“Due to insufficient capacity, moving the selected user(s) to registration will result in overbooking the capacity”*.

7. The Activity Roster Page, showing the newly registered learners, will be displayed for you to manage. To view all registrations, click the magnifying glass.

The screenshot shows the 'Activity Roster Page'. At the top, there is a search bar with a magnifying glass icon, an 'ADVANCED...' button, and a 'Clear Search results' link. Below the search bar are buttons for 'Add', 'Remove', and 'Unlock'. The main part of the page is a table with columns: 'Name', 'Username', 'Status', 'Status Date', 'Score', and 'Duration (Hrs Min)'. There are three rows of data, all with a status of 'Registered' and a status date of '12/12/2019 4:43:23 PM PST'. At the bottom, there are buttons for 'OK', 'CANCEL', 'APPLY', 'APPLY TO ALL', and 'SEND E-MAIL'.

Cancel/Drop Registrations

Best practice is for learners to cancel their own registration to classes. If a learner is unable to cancel - for example, due to being on leave - you can cancel a learner's registration.

Notes:

- Do **NOT** "Remove" learners from the class as this will remove all record of the learner's registration for this class.
- Due to the parent/child relationship between courses and classes, the learner registration will also be reflected at the course level. Follow the same steps to cancel the learner registration from the course level.

1. Select the checkbox beside the names you want to cancel from the roster.
2. Select **Canceled** from the Status drop-down selection, followed by **APPLY**. A confirmation message will be displayed. Click **OK** for the roster to be updated to show the selected learner as "Canceled".

The screenshot shows a table with columns for Username, Status, and Status Date. A dropdown menu is open over the Status column, with 'Canceled' highlighted. Below the table are buttons for OK, CANCEL, and APPLY.

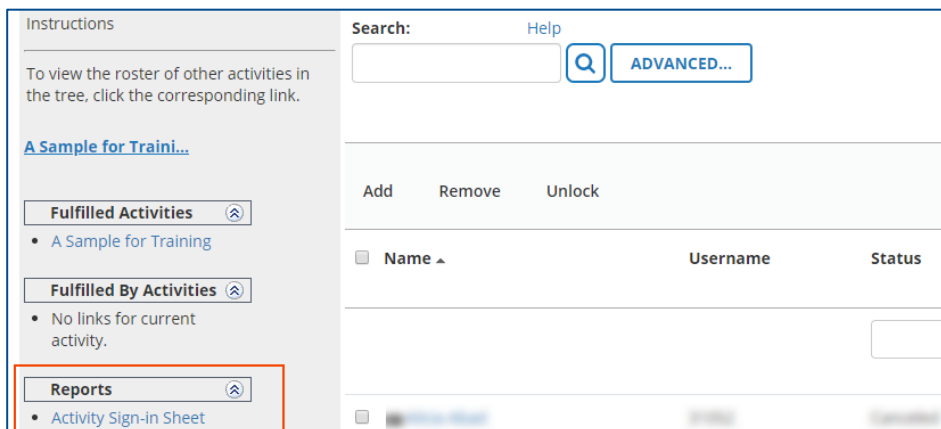
Username	Status	Status Date
	Attended	2/12/2019 4:43:23 PM PST
	No show	2/12/2019 4:43:23 PM PST
	Canceled	2/12/2019 4:43:23 PM PST
	Registered	2/12/2019 4:43:23 PM PST
	Waived	2/12/2019 4:43:22 PM PST
	In Progress	

Buttons: OK, CANCEL, APPLY

Print Built-in Class Sign-In Sheet

A basic sign-in sheet is built into sccLearn and available for printing. If this sign-in sheet does not meet specific needs for your program, contact the sccLearn Program Manager for alternatives.

1. Click **Activity Sign-in Sheet** under Reports in the left tab.



2. At the Activity Sign-In Sheet window:
 - Click **EXPORT TO PDF** followed by the **Click here to download the file** message to save the roster as a pdf file.
 - Click **PRINT** for the print dialog box to directly print the roster.



Email Learners

There may be instances where you need to email learners. Some scenarios where this may be needed are:

- To send prework such as handouts or class materials to registered learners.
- To notify webinar learners of the virtual location and access codes to attend the class.
- To notify Wait Listed learners or those who have Expressed Interest that you are offering the class on another date and if they would like to register.

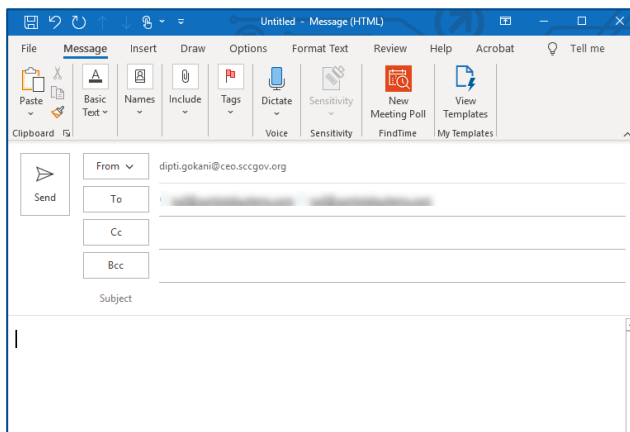
In addition to emailing learners, you could also export the list to Excel to capture the learner details and email them outside of sccLearn.

1. Select the checkbox beside the names you want to email and click **Send E-Mail**. To select everyone, click the check box beside the Name column title.

<input type="checkbox"/> Name ^	Username	Status	Status Date	Score	Duration Hrs Min
		<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
				<input type="checkbox"/> (Clear Value)	<input type="checkbox"/> (Clear Value)
<input type="checkbox"/>		Registered	12/9/2019 3:46:07 PM PST		
<input type="checkbox"/>		Registered	12/9/2019 3:46:07 PM PST		
<input type="checkbox"/>		Registered	12/9/2019 3:46:07 PM PST		
<input checked="" type="checkbox"/>		Registered	12/9/2019 3:46:07 PM PST		
<input type="checkbox"/>		Registered	12/9/2019 3:46:07 PM PST		
<input checked="" type="checkbox"/>		Registered	12/9/2019 3:46:07 PM PST		
<input type="checkbox"/>		Registered	12/9/2019 3:46:07 PM PST		
<input type="checkbox"/>		Registered	12/9/2019 3:46:07 PM PST		
<input type="checkbox"/>		Registered	12/9/2019 3:46:07 PM PST		
<input type="checkbox"/>		Registered	12/9/2019 3:46:07 PM PST		

OK CANCEL APPLY APPLY TO ALL SEND E-MAIL

2. Prepare your email and click **Send**.



5 - Post-Class Roster Management

Post-class activities include all the roster related activities you may need to complete after the class has taken place, such as:

- Marking Attendance for:
 - Wait listed learners that attended as walk-in learners
 - Walk-in learners that were not registered
 - Registered learners that did not attend
 - Registered learners that attended
- Correcting the status of learners

You are highly encouraged to complete the Orientation to sccLearn Administration web based training AND practice the activities in this guide in the sccLearn Sandbox System (<https://scclearn.stage.sumtotal.host>) to become familiar with the tasks before working in the production sccLearn system (<https://scclearn.sccgov.org>)

Mark Attendance for a Class

When marking attendance, you are updating the class roster to reflect the status of all learners that attended the class as “Attended”, “Passed”, and/or “Completed”. Registered learners that did not attend the class would be marked as “No Show” (recommended) or “Canceled.”

Multi-Day Class:

Marking attendance is completed at the session level to allow the learner to receive credit for the sessions they attended. As an administrator, navigate to the session to mark attendance. If a learner does not attend the session, they would be considered a “**No Show**” for that session. Their learner status for the class will remain as “**In Progress**” until the class is completed. If they attend a “**make-up**” session at a later date, you will need to correct the status of the “**No Show**” status to reflect the actual date they completed the class.

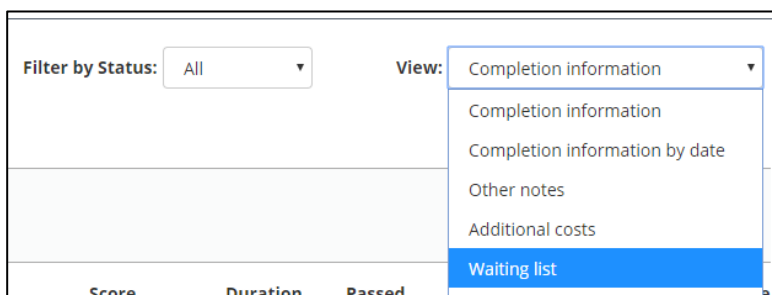
Wait Listed Learners that Attended as Walk-in Learners

All learners that were **wait listed** but attended as a walk-in learner, need to be moved to the roster.

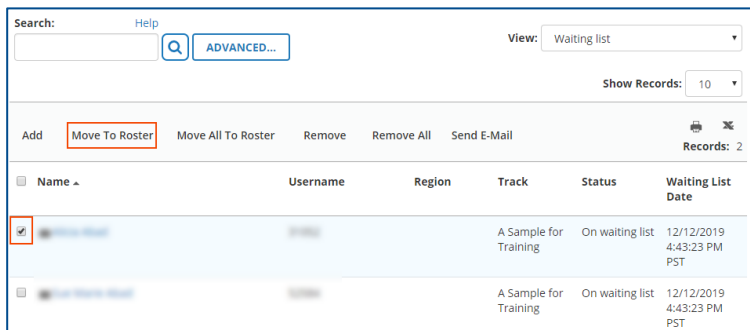
Note:

- When a learner is offered an open seat in a class, the system will hold that seat. Therefore, the system may read that there are no open seats even if the class is not at maximum capacity yet.

1. Click the **View** drop-down selection box and select **Waiting List**, to view learners on the waiting list.



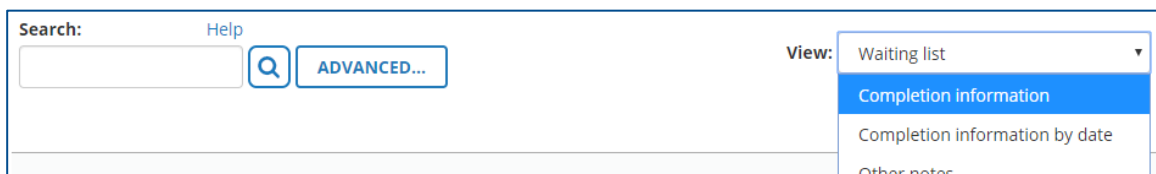
2. Select the checkbox beside the names you want to move to the roster and click **Move To Roster**. Alternatively, you can click **Move All To Roster** if you wish to move *every* learner from the waiting list to the roster.



Notes:

- Once you move a learner to the roster, sccLearn will send them a registration notification.
- You may need to update your capacity if the number of learners you wish to add exceeds the maximum capacity set at the class level.

3. Select **Completion Information** from the View drop-down selection box to confirm they are registered.



Walk-in Learners that Attended Without Registering

All learners that were **not registered and attended** will need to be added to the roster prior to continuing. Refer to the instructions to **The excel file will display the details** for the selected activity.

The screenshot shows an Excel spreadsheet with the following content:

- Activity Roster-Baking Bread 101 (6/16/2020 - 6/16/2020)
- Generated By: Dipti Gokani
- View: Completion information
- Created on: Monday, July 13, 2020 11:31:30 AM PDT
- Activity Type: Instructor Led Training Class
- Code: SCC-00002180--00000001
- Location: SCC Charcot: TC1,SCC: 2310 N 1st Street, Suite
- Instructor: SCC-Staff
- Vendor:

Name	E-mail Address	User name	Primary Job	Primary Domain	Primary Org. Name	Org. Code	Org. Contact Phone #	Status	Status Date
	null@sumtotalsystems			SCC	SANTA CLARA	921		Registered	5/22/2020
	null@sumtotalsystems			SCC	SANTA CLARA	921		Canceled	5/22/2020
	null@sumtotalsystems			SCC	SANTA CLARA	921		Registered	5/22/2020
	null@sumtotalsystems			SCC	PUBLIC DEFENDER	204		Registered	5/22/2020

Note:

- The excel file will contain the following information for each learner (based on data available):

Name	E-mail Address	Username
Primary Job	Primary Domain	Primary Org. Name
Org. Code	Org. Contact Phone #	Status
Status Date	Score	Duration (Hrs/Min)
Passed	Completed	Signature Status
Approved by Manager	Enrolled by Position	User Code

Add Learners to Class Roster or Wait List.

Registered Learners that Did Not Attend

It is recommended to mark all learners that were **registered but did not attend** the class, with a **No Show** status. This allows the department, the learner’s manager (if configured within sccLearn), and the learner to keep track of registrations. A notification will be sent to the manager (if configured) indicating that their registered employee did not attend the training.

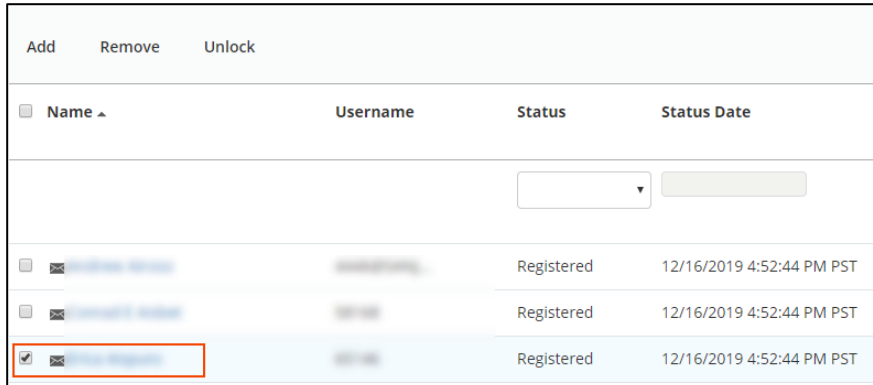
Note:

- If you do not mark the learners with a No Show Status, their registration will need to be canceled (dropped) from the roster prior to continuing. Refer to the instructions to **Cancel/Drop Registrations**.

Multi-Day Class:

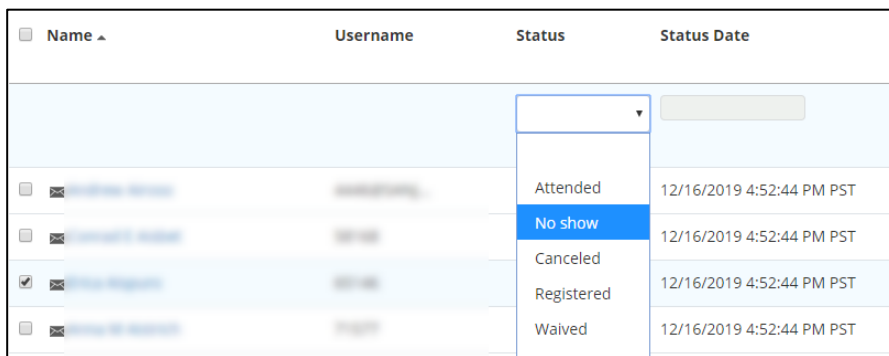
As you will be marking attendance at the session level to accurately record attendance in the event that learners do not attend all the sessions, select the session level when you select the status for the learner.

1. Select the checkbox beside the registered learners who **did not attend** the class.



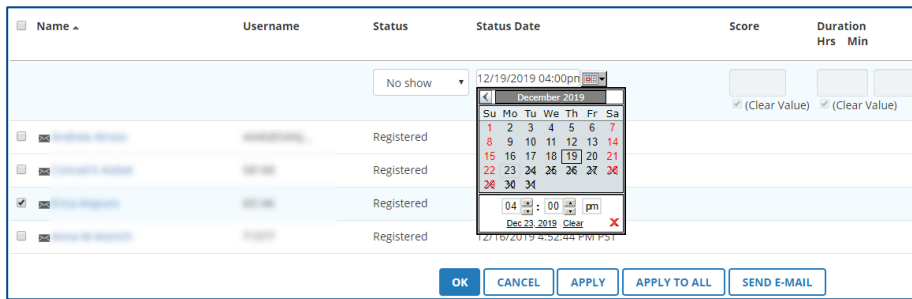
Add Remove Unlock			
<input type="checkbox"/> Name ^	Username	Status	Status Date
		<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	[blurred]	Registered	12/16/2019 4:52:44 PM PST
<input type="checkbox"/>	[blurred]	Registered	12/16/2019 4:52:44 PM PST
<input checked="" type="checkbox"/>	[blurred]	Registered	12/16/2019 4:52:44 PM PST

2. Select **No Show** (or **Canceled**) from the Status drop-down selection.



<input type="checkbox"/> Name ^	Username	Status	Status Date
		<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	[blurred]	Attended	12/16/2019 4:52:44 PM PST
<input type="checkbox"/>	[blurred]	No show	12/16/2019 4:52:44 PM PST
<input checked="" type="checkbox"/>	[blurred]	Canceled	12/16/2019 4:52:44 PM PST
<input type="checkbox"/>	[blurred]	Registered	12/16/2019 4:52:44 PM PST
<input type="checkbox"/>	[blurred]	Waived	12/16/2019 4:52:44 PM PST

3. The **Status Date** field will become available to edit. Click the calendar to select the end date and time of the class. Click “x” to close the calendar.



4. Click **APPLY** followed by **OK** to the confirmation message.

Note:

- Do **NOT** click **APPLY TO ALL** as this will apply the no show status to ALL learners registered for the class.

Multi-Day Class:

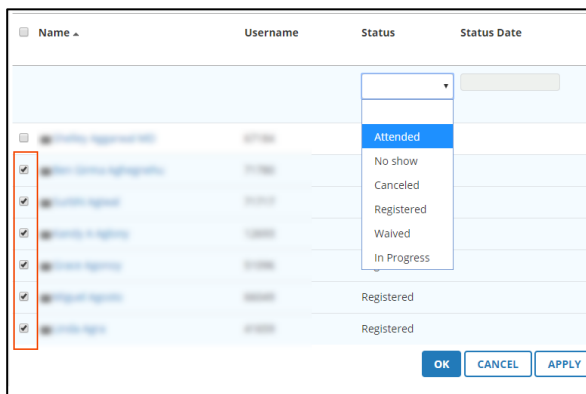
If you are marking attendance for a Multi-Day Class, you will receive a message indicating: *“This change will be applied to both the parent activity and all of its child activities.”*

5. Verify the roster is updated to show the selected learner status as “No Show”.

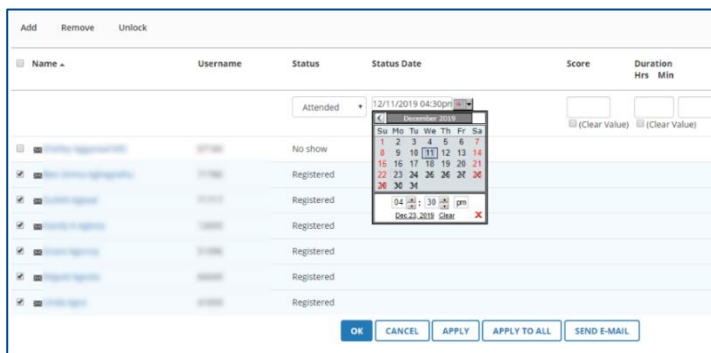
Name	Username	Status	Status Date
		<input type="text" value="No show"/>	<input type="text" value="12/19/2019 4:00:00 PM PST"/>
<input type="checkbox"/>	[blurred]	Registered	12/16/2019 4:52:44 PM PST
<input type="checkbox"/>	[blurred]	Registered	12/16/2019 4:52:44 PM PST
<input type="checkbox"/>	[blurred]	No show	12/19/2019 4:00:00 PM PST

Registered Learners that Attended

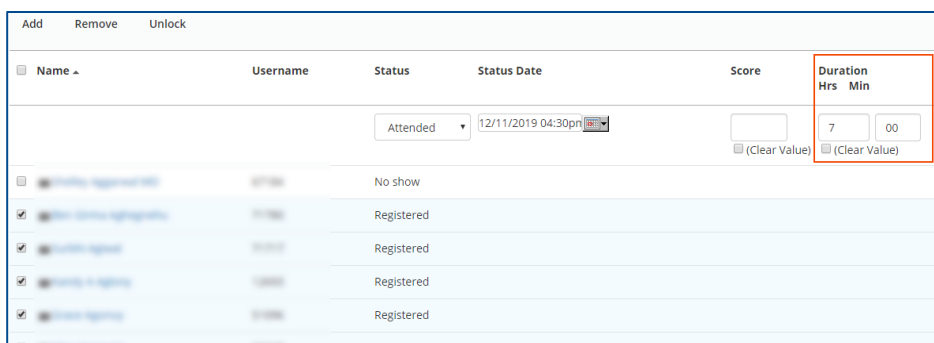
1. Select the checkbox beside the registered learners that **attended** the session. Select **Attended** from the Status drop-down selection.



2. The **Status Date** field will become available to edit. Click the calendar to select the end date and time of the class. Click “x” to close the calendar.



3. Enter the **Duration** of the class.



Multi-Day Class:

If this is a Multi-Day Class with each session having the same duration, enter the duration for one session. If this is a Multi-Day Class with sessions of different durations, the attendance will need to be marked on each individual session.

4. Change the status of:

Passed to Yes.

Completed to Yes.

The screenshot shows a web interface for managing a class roster. At the top, there are fields for 'Status' (set to 'Attended'), 'Status Date' (12/11/2019 04:30pm), 'Score', and 'Duration' (7 Hrs, 00 Min). Below these are two dropdown menus for 'Passed' and 'Completed', both currently set to 'Yes'. A table below lists learners with columns for Name, Username, Status, Status Date, Score, Duration, Passed, Completed, and Signature Status. The 'Passed' and 'Completed' columns have dropdown menus. At the bottom, there are buttons for 'OK', 'CANCEL', 'APPLY', 'APPLY TO ALL', and 'SEND E-MAIL'.

Notes:

- If these are both left blank, sccLearn assumes both will be set to **Yes**.
- Some departments reflect learners that **unsuccessfully** completed an activity by marking the learner as:
 Completed: **YES**
 Passed: **NO**
- Confirm with your department before marking learners with unsuccessful completion.

5. Click **APPLY** for a confirmation message indicating the changes have been applied, followed by **OK**. The Activity Roster will be updated to show the selected learner status as “Attended”.

Note:

- Do **NOT** click APPLY TO ALL as this will apply the attended status to ALL learners registered for the class.

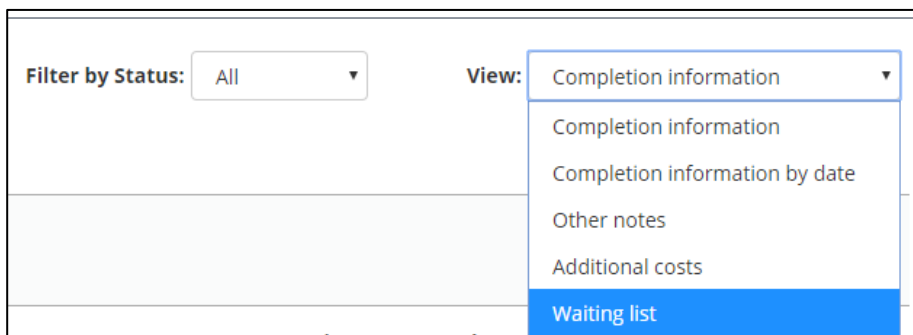
Multi-Day Class:

If you are marking attendance for a Multi-Day Class, you will receive a message indicating: *“This change will be applied to both the parent activity and all of its child activities.”*

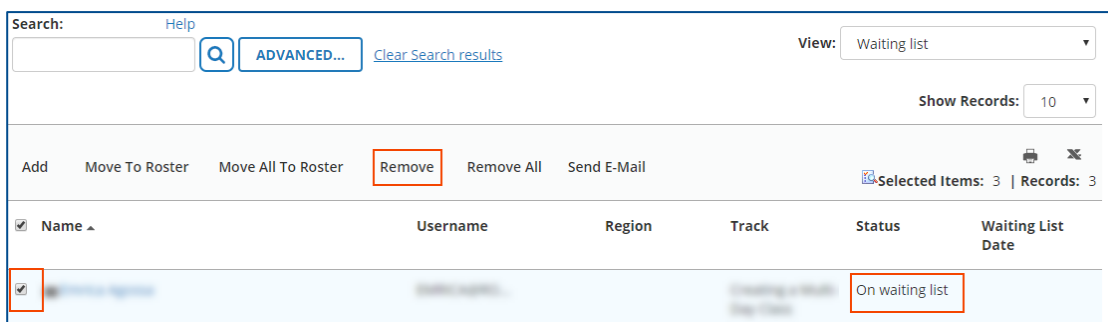
Wait Listed Learners that did Not Attend

Learners who were wait listed but did not attend, need to be released from the class before they can register for another class (offering of the same course).

1. Click the View drop-down selection box and select **Waiting List**.



2. Select the checkbox beside each learner and click **Remove** and click **OK** to continue from the confirmation message.



Notes:

- Once the Waiting List is cleared, click **Cancel** to close the message indicating there are no records to display and return to the Activity Management page.
- Wait listed learners will remain on the course waitlist as well unless they are removed by an administrator.

Correct Status of Completed Class

You can change the status of a learner after the class attendance has been marked. This occurs if a status was set incorrectly or if a learner forgot to sign the roster and realized it after receiving a No Show status.

1. Click on the **learner name** whose status you want to adjust

Name	Username	Status
<input type="checkbox"/>		Attended
<input type="checkbox"/>		Attended
<input type="checkbox"/>		Attended
<input type="checkbox"/>		No show

2. Correcting the status varies for Single and Multi-Day Classes.

Single Day Class:

Select the **class title** when the learner profile is displayed.

Latest attempt				
Name	Registered Status	Status Date	Score	Duration Hrs Min
			(Clear Value)	(Clear Value)
<input type="checkbox"/> Instructor Led Training Class A Sample for Training	No	No show	1/29/2020 11:10:00 AM PST	

Multi-Day Class:

Each child session will be displayed individually and will need to be adjusted to reflect the status change in the parent class. Select the checkbox beside the session title(s) you need to change.

Name	Registered Status	Status Date	Score	Duration Hrs Min
			(Clear Value)	(Clear Value)
<input type="checkbox"/> Instructor Led Training Class Creating a Multi-Day Class				
<input type="checkbox"/> Session Creating a Multi-Day Class - Day 1	No	No show	3/10/2020 1:48:04 PM PDT	
<input type="checkbox"/> Session Creating a Multi-Day Class - Day 2	No	No show	3/10/2020 1:48:36 PM PDT	

3. Select the new status from the Status drop-down selection.

Name	Registered Status	Status Date	Score	Duration Hrs Min	Passed	Completed
<input type="checkbox"/> Instructor Led Training Class A Sample for Training	No	1/29/2020 11:10:00 AM PST	<input type="text"/> (Clear Value)	<input type="text"/> (Clear Value)	<input type="text"/>	<input type="text"/>

Attended
No show
Canceled
Registered
Waived
In Progress

APPLY CANCEL

Single Day Class:

If you select the status to be:

No Show: The Status Date, Duration, Passed and Completed fields **will be reset** to blank.

Attended: The Status Date, Duration, Passed and Completed fields **will need to be entered** to reflect the correct status.

Multi-Day Class:

If you select the status to be:

No Show for each session: The Status Date, Duration, Passed and Completed fields **will be reset** to blank.

Attended for each session: The Status Date, Duration, Passed and Completed fields **will need to be entered** to reflect the correct status.

Different for each session: The Status will display as **In Progress** for the class when viewing the activity roster, while each session will reflect the individual status.

4. Click **APPLY** followed by **OK** to the confirmation message.
5. Click **Cancel** to close the Learner Profile window and return to the Activity Roster, which will be updated to show the new learner status. Click **Cancel** again to return to the Learning Activities page.

6 - Miscellaneous Activity Related Tasks

Once your courses and classes have been created, there may be occasions when you need to:

- View Express Interest List
- Edit the activity
- Copy an existing class
- Cancel the class
- Deactivate the course

These instructions are written with the assumption that you are familiar with creating courses and classes as well as roster management. Refer to those sections if you need guidance as you work through these tasks.

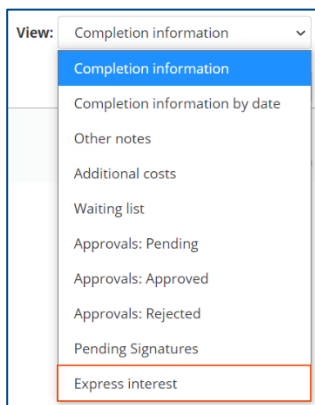
You are highly encouraged to complete the Orientation to sccLearn Administration web based training AND practice the activities in this guide in the sccLearn Sandbox System (<https://scclearn.stage.sumtotal.host>) to become familiar with the tasks before working in the production sccLearn system (<https://scclearn.sccgov.org>)

View Express Interest List

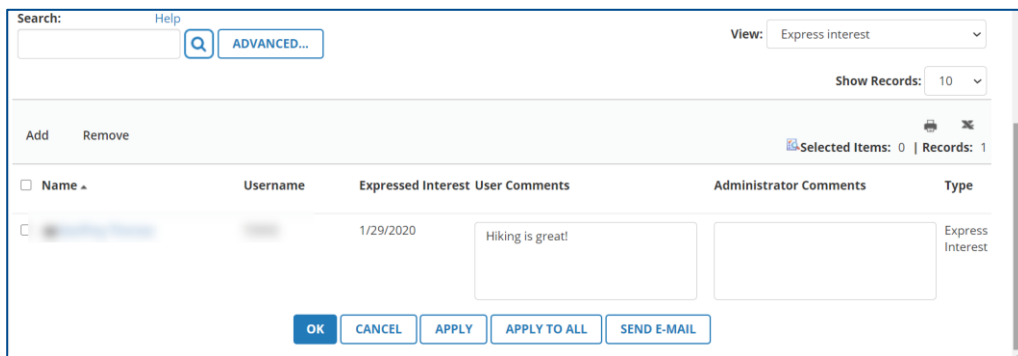
The Express Interest list is useful to gauge how many learners may be interested in taking the course. The Express Interest property is configured when the course is created, so it may not be available for all courses. If configured at the course level, during the creation of classes (or offerings of courses), an option to notify the learners that have expressed interest will be provided.

Refer to the Orientation to Administration Training in sccLearn for how to navigate the Roster Management page.

1. Having opened the roster for the course, change the view from **Completion Information** to **Express Interest**.



2. The Express interest list will be displayed with the comments that the user entered when they expressed interest.



Edit Activity

The process for editing **published** activities, whether webinars, courses, or classes, is very similar.

Notes:

- If you edit a course, the changes will reflect in any classes created after.
- The changes will not reflect in previously created classes.
- If you want the changes reflected in previous classes, you will need to edit each class manually.

As the activity has already been published, you will be editing a **copy of the activity**. While editing the copy, the **current version** will remain visible to the learner. Once you have edited and validated the activity, selecting **Moving to Production** will update the current version for consumption.

Impact to Learners

An email confirmation notification will be sent out to learners when the title, location, or time of a class has been changed.

Edit Class

On the Activity Management page, click **EDIT** beside the activity name.

The screenshot shows the 'ACTIVITY MANAGEMENT' interface. At the top, there are buttons for 'FILE UPLOAD' and 'NEW ACTIVITY'. Below that is a search bar with 'sample' entered and an 'ADVANCED' filter button. A table lists activities with columns for Name, Activity Type, Start Date, End Date, Code, Primary Domain, Facility, Published Date, Last Updated Date, and Actions. The second row's 'EDIT' button is highlighted with a red box.

Name	Activity Type	Start Date	End Date	Code	Primary Domain	Facility	Published Date	Last Updated Date	Actions
• A Sample for Training	Instructor Led Training Class	2/4/2020 8:30 AM PST	2/4/2020 4:30 PM PST	SCC-00002046-00000001	SCC	SCC: 2310 N 1st Street Suite 102; San Jose 95131, San Jose, CA, USA	12/10/2019 11:15 AM PST	12/10/2019 11:15 AM PST	EDIT
• A Sample for Training	Instructor Led Training Class	1/21/2020 8:30 AM PST	1/21/2020 4:30 PM PST	SCC-00002046-00000002	SCC	SCC: 2310 N 1st Street Suite 102; San Jose 95131, San Jose, CA, USA	12/11/2019 10:56 AM PST	12/11/2019 10:56 AM PST	EDIT

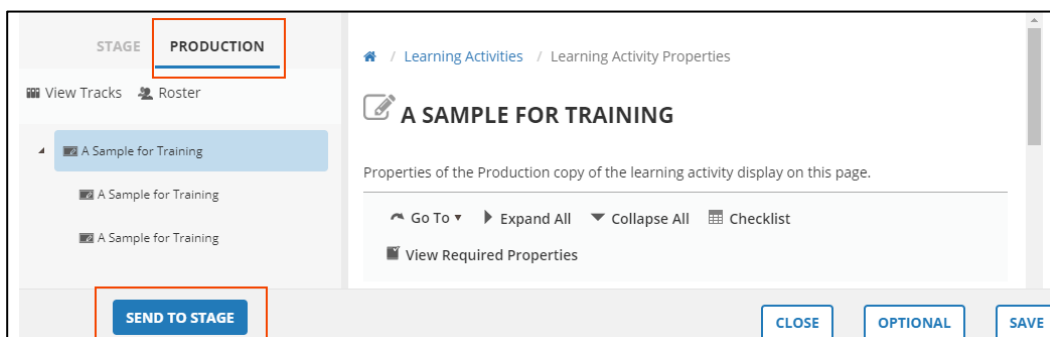
Changing Class Date

If you need to reschedule a class, it is highly recommended to create a new class instead of changing the date of the existing class. There are two reasons for this:

1. You do not know if the new date works for all learners registered to the existing class.
2. The system sends out a notification telling registered learners that the class has changed, but it does not send out a new Outlook calendar invite, nor does it update the existing calendar invite.
3. The cancelation deadlines for existing registered learners does not change with the schedule change. This can result in registered learners not being able to cancel their own registration.

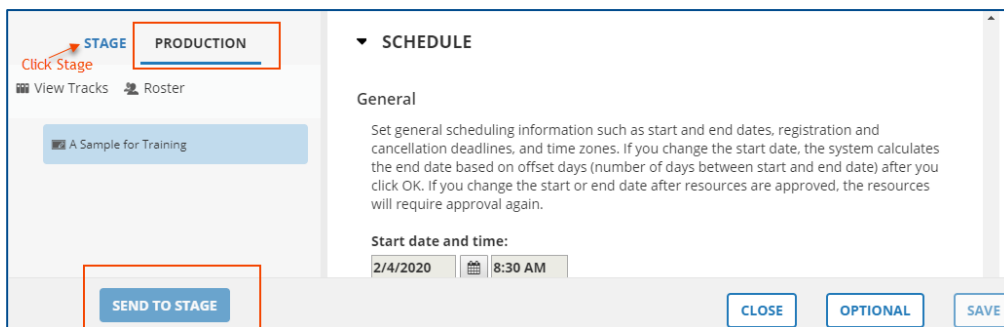
Send to Stage

Click **Send To Stage** once the Learning Activities properties are displayed and make any necessary edits to the class in stage. Verify the details are correct and **SAVE** the changes.



Note:

- If **Send To Stage** is greyed out, the activity has already been sent to stage for editing. Click **Stage** across the top.



Validate for Production

Click **Validate for Production** to ensure there are no errors and you have entered all necessary details for your activity.

Note:

- As is the case when creating the activities, you are encouraged to resolve the errors before proceeding.

Move to Production

Considerations Before Proceeding:

- Moving to production will **update the settings** for the class that is visible for registration, unless the visibility for the class was changed.
- An email confirmation notification will be sent to the mailbox of the Activity Owner identified for the class.
- An email confirmation notification will be sent to the learner **only** if the title of the class, the location of the class or the time of the class have changed.

Click **Move to Production** to update the current version of the activity for your selected audience to see in sccLearn. Close the validation message to return to the Activity Management page in Learning Activities.

Copy Existing Class

If you are offering a class multiple times, it may be easier to create a copy of the class than create a new class.

1. Click the radio button next to the class name and click the **Copy** icon.

Note:

- The copy icon is only available if the **“Can be Copied” Status** was selected in the existing class.
- Copying the class does **not** send out express interest notifications. To notify learners that have expressed interest, you **must** create a new class.

The screenshot shows the 'ACTIVITY MANAGEMENT' interface. At the top, there are buttons for 'FILE UPLOAD' and 'NEW ACTIVITY'. Below that is a search bar with 'sample' entered and an 'ADVANCED' filter button. The interface displays 'Displaying 10 of 12 Records' and has pagination options for 10, 25, 50, and 100 records. There are also icons for 'Export', 'Print', 'Copy', and 'Delete'. A dropdown menu shows 'Instructor Led Training Class' and 'Active'. The main table has the following columns: Name, Activity Type, Start Date, End Date, Code, Primary Domain, Facility, Published Date, Last Updated Date, and Actions. Two rows are visible, both for 'A Sample for Training'.

Name	Activity Type	Start Date	End Date	Code	Primary Domain	Facility	Published Date	Last Updated Date	Actions
A Sample for Training	Instructor Led Training Class	2/4/2020 8:30 AM PST	2/4/2020 4:30 PM PST	SCC-00002046-00000001	SCC	SCC: 2310 N 1st Street Suite 102; San Jose 95131, San Jose, CA, USA	12/10/2019 11:15 AM PST	12/10/2019 11:15 AM PST	EDIT
A Sample for Training	Instructor Led Training Class	1/21/2020 8:30 AM PST	1/21/2020 4:30 PM PST	SCC-00002046-00000002	SCC	SCC: 2310 N 1st Street Suite 102; San Jose 95131, San Jose, CA, USA	12/11/2019 10:56 AM PST	12/11/2019 10:56 AM PST	EDIT

Class Dates

You have three options by which to select the dates for the next class.

- **Keep the same dates and times** allows you to keep the date and time of the session. This could be useful if you are creating a concurrent class at another location.
- **Offset the dates and times by** allows you to create classes every week or on the same day each week.
- **Offset the dates and times relative to** allow you to select the date and time of the next class by clicking on the calendar icon.


Note:

- The recommended best practice is to use **Offset the dates and times relative to**.

The 'DATES' configuration form has three radio button options. The first is 'Keep same dates and times'. The second is 'Offset dates and times by:', followed by three input fields for 'Day(s)', 'Hour(s)', and 'Minute(s)'. The third option is 'Offset dates and times relative to:', which is selected. Below this is a calendar icon and a dropdown menu showing 'America/Los Angeles'.

Quantity

Select the number of copies based on the dates selected.

Offset dates and times relative to:
 

NUMBER OF COPIES

Make the following number of copies:

Properties to Copy

Click **OK** to copy all properties for the original class.

Notes:

- If you have planned a different resource or location for the class, uncheck the resource selection.
- Do **NOT** change any other default properties on this page.

EDIT PROPERTIES FOR THE NEW COPY

<input checked="" type="checkbox"/> Configure general properties for your activity	<input checked="" type="checkbox"/> Registration	<input checked="" type="checkbox"/> Resources	<input checked="" type="checkbox"/> Skills and Competencies	<input checked="" type="checkbox"/> Notifications	<input checked="" type="checkbox"/> Management
<input checked="" type="checkbox"/> General	<input checked="" type="checkbox"/> Availability	<input checked="" type="checkbox"/> Instructors	<input checked="" type="checkbox"/> Skills	<input checked="" type="checkbox"/> System	<input checked="" type="checkbox"/> Users
<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> Audiences	<input checked="" type="checkbox"/> Locations	<input checked="" type="checkbox"/> Competencies	<input checked="" type="checkbox"/> User Defined	<input checked="" type="checkbox"/> Organizations
<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/> Allocations	<input checked="" type="checkbox"/> Vendors			<input checked="" type="checkbox"/> Jobs
<input checked="" type="checkbox"/> Certification	<input checked="" type="checkbox"/> Prerequisites	<input checked="" type="checkbox"/> Equipment			<input checked="" type="checkbox"/> Topics
<input checked="" type="checkbox"/> Grading and Completion	<input checked="" type="checkbox"/> Evaluations	<input checked="" type="checkbox"/> Virtual Lab			<input checked="" type="checkbox"/> Audiences
<input checked="" type="checkbox"/> Translated Properties	<input checked="" type="checkbox"/> Rating				<input checked="" type="checkbox"/> Manager Assignment Setting
<input checked="" type="checkbox"/> Metadata	<input checked="" type="checkbox"/> Auto-Registration				
<input checked="" type="checkbox"/> System Defined	<input checked="" type="checkbox"/> Auto-Cancellation				
<input checked="" type="checkbox"/> Optional Information	<input checked="" type="checkbox"/> EHRI Settings				
<input checked="" type="checkbox"/> User Defined	<input checked="" type="checkbox"/> Jobs				
<input checked="" type="checkbox"/> Activity Filters	<input checked="" type="checkbox"/> Organizations				
<input checked="" type="checkbox"/> Costs					
<input checked="" type="checkbox"/> General					
<input checked="" type="checkbox"/> Related Activities					
<input checked="" type="checkbox"/> Fulfillment Links					
<input checked="" type="checkbox"/> Subscription Links					
<input checked="" type="checkbox"/> Continuing Education					
<input checked="" type="checkbox"/> Associated Bundles					
<input checked="" type="checkbox"/> Schedule					
<input checked="" type="checkbox"/> General					

Name and Owner

Remove **Copy (x)** of from the name of the course and update the Activity owner to reflect your department.

Start Date, End Date, Registration and Cancelation Deadlines

These dates will be pre-populated based on the Offset date you selected during the copy process but may need to be updated.

Single Day Class:

Confirm that the dates for the class are correct or adjust as needed.

Multi-Day Class:

Ensure that all date details are correct to reflect the start of the class for first session and end of the class for the last session. Also verify that the deadlines reflect the first session.

Locations and Instructors

The location and instructors will be pre-populated when the session was copied if the properties were not deselected. Confirm the resources are correct or adjust as needed.

Multi-Day Class:

If you copied a Multi-Day Class, ensure that all child session details are correct.

Notes:

- Confirm the resources **prior to** associating them with the class.
- sccLearn does **not** connect with Outlook or any external system to coordinate with calendars or booking systems.

Waiting List Properties

Confirm the wait list information is correct or adjust as needed before validating and publishing the class.

Publish the Class

Confirm that everything for the class has been entered correctly. Click **Validate for Production** to ensure you have entered all necessary details and there are no errors. Resolve any errors before proceeding to **Move to Production**.

Notes:

- Moving to Production will **open the class for registration**. If you are **NOT** ready to launch the class, leave the class in Stage until you are ready to move to production.
- An email confirmation notification will be sent out to the mailbox of the Activity Owner identified for the class.
- Copying an existing class does not send out Express Interest notifications regardless of how the original class was configured.
- To notify learners that have expressed interest, you **must** create a new class.

Configure Additional Copies

If you made more than one copy of the class, be sure to configure all remaining copies of the copied class.

Cancel Class

Classes can be canceled for various reasons. Typically, you will be canceling a class that learners have already registered for. Therefore, you would need to notify all registered and wait listed learners that the class will no longer be offered. In addition, you will need to clear the waiting list before canceling the class, so it is no longer visible to learners.

Notes:

- It is assumed you are familiar with performing Roster Management tasks.
- Refer to the [Pre-Class Roster Management](#) section for instructions if you need guidance on the individual tasks.

Notify and Remove Wait Listed Learners

1. View learners on the **Waiting List** for the class being canceled. Select all learners and click **Send E-mail** to notify them of the reason for being canceled from the class (i.e. the class is no longer being offered). Provide alternate dates that they may register for.

Note:

- It is best practice to notify the learners **prior to** removing them from the class wait list as sccLearn will send them a notification when they are removed.

2. Select all learners again (if not already selected) and click **Remove**.

Notify and Cancel Registered Learners

1. View **Registered** learners for the class being canceled. Select all learners and click **Send E-mail** to notify them of the reason for being canceled from the class (i.e. the class is no longer being offered). Provide alternate dates that they may register for.

Note:

- It is best practice to notify the learners **prior to** canceling them from the class as sccLearn will send them a notification when they are removed.

2. Select all learners again (if not already selected) and click the drop-down arrow beside **Status** and select **Canceled**. Click **APPLY**.

Cancel Class

1. **Edit** the class to be canceled and modify the **Status** properties of the class so it is not visible and cannot be registered for.
 - Status setting **required** to be **NOT** selected: **Active**
 - Status setting **required** to be selected: **Canceled**

Status

Control the availability of this activity for use in other activities

Active

Hide from search results for Learners and Managers

Canceled

No registration required

Hide in Manager mode

Hidden from Transcript

Can be copied

2. **Save** the class and click **Validate for Production** to identify where additional configurations are needed for canceling the activity.

Notes:

- It is normal to see warnings and/or errors when canceling a class.

Issues

Error ❌ Track includes activity Painting Sunflowers with Dipti 20200810 that is either canceled or inactive. Please remove the activity from the track or inactivate the track.

Warning ⚠️ The activity that you are moving to production is inactive while the offering source is active.

[MOVE TO PRODUCTION](#)

- The **MOVE TO PRODUCTION** button will **not** be available until the errors have been resolved.

3. Click the **Error Message** to navigate to the property causing the error. Deselect the **Active** property and click **OK**. You will be returned to the Validation Results page.

A screenshot of a form with the following elements: a checked checkbox labeled 'Active' (highlighted with a red box), an unchecked checkbox labeled 'Requires Approval', a text input field labeled 'Default approver:' followed by a 'BROWSE...' button, and two buttons at the bottom: 'CANCEL' and 'OK'.

4. Click **Validate for Production** again.

A screenshot of an 'Issues' section. It contains a warning icon and the text: 'The activity that you are moving to production is inactive while the offering source is active.' Below the message is a blue button labeled 'MOVE TO PRODUCTION'.

5. Click the **MOVE TO PRODUCTION** button which should now be available.

Note:

The Warning message is informational and does not require resolving.

Multi-Day Class:

You may receive an error notification prompting you to also configure these Status settings for the individual sessions. Follow the steps to click on the notification message and resolve the errors before proceeding to validate and move the class to production.

Deactivate Course

Deactivating a course that is no longer offered, will remove the course from the catalog and learners will not be able to find the course using the search feature.

Prior to deactivating the course, you should:

1. Ensure all delivered/completed classes have been marked as attended.
2. Cancel all future classes.
3. Notify all registered and wait listed learners and those that have expressed interest that the course will no longer be offered.
4. Clear all upcoming registrations, so the activity no longer appears on the schedule for those learners.

Notes:

- It is assumed you are familiar with performing Roster Management tasks.
- Refer to the **Pre-Class Roster Management** section for instructions if you need guidance on the individual tasks.

Notify and Remove Wait Listed Learners

1. View learners on the **Waiting List** for the course being deactivated. Select all learners and click **Send E-mail** to notify them of the reason for being removed from the list (i.e. the course is no longer being offered). Include alternative courses that they may register for.

Note:

- It is best practice to notify the learners **prior to** removing them from the class wait list as sccLearn will send them a notification when they are removed.

2. Select all learners again (if not already selected) and click **Remove**.

Notify and Cancel Registered Learners

1. View **Registered** learners for the course being deactivated. Select all learners and click **Send E-mail** to notify them of the reason for being canceled from the course (i.e. the course is no longer being offered). Include alternative courses they may register for.

Note:

- It is best practice to notify the learners **prior to** canceling them from the class as sccLearn will send them a notification when they are removed.

2. Select all learners again (if not already selected) and click the drop-down arrow beside **Status** and select **Canceled**. Click **APPLY**.

Notify and Remove Express Interest Learners

1. View learners who have **Expressed Interest** for the course being deactivated. Select all learners and click **Send E-mail** to notify them of the reason for being removed from list (i.e. the course is no longer being offered). Include alternative courses that they may register for.

Note:

- It is best practice to notify the learners **prior to** removing them from the express interest list as sccLearn will send them a notification when they are removed.

2. Select all learners again (if not already selected) and click **Remove**.

Deactivate Course

1. **Edit** the course to be deactivated and modify the **Status** properties of the course so it is no longer active.

Status setting **required** to be NOT selected: **Active**:

The screenshot shows a dialog box titled 'Creating a Course' in the 'PRODUCTION' stage. The 'Status' section is expanded, showing a list of status options. The 'Active' checkbox is selected and highlighted with a red box. Other options include 'Hide from search results for Learners and Managers', 'Canceled', 'No registration required', and 'Hide in Manager mode'.

2. **Save** the course and click **Validate for Production** to identify where additional configurations are needed for deactivating the course.

Notes:

- It is normal to see warnings and/or errors when deactivating the course.

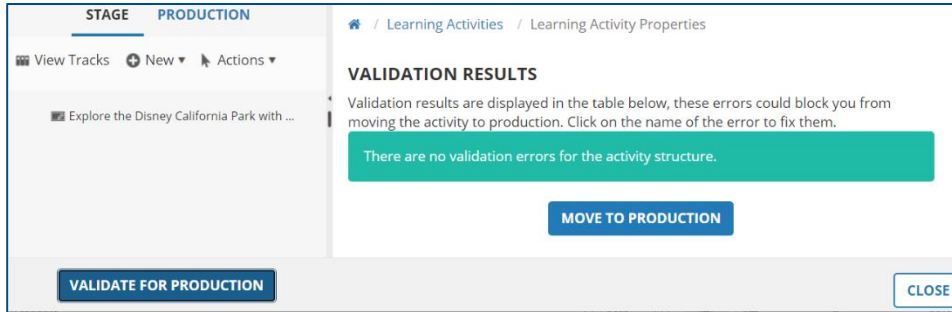
The screenshot shows the 'Issues' section of the 'Validate for Production' dialog. It contains a warning message with a red 'x' icon: 'Track includes activity Explore the Disney California Park with Dipti that is either canceled or inactive. Please remove the activity from the track or inactivate the track.' Below the message is a blue button labeled 'MOVE TO PRODUCTION'.

- The **MOVE TO PRODUCTION** button will **not** be available until the errors have been resolved.

3. Click the **Error Message** to navigate to the property causing the error. Deselect the **Active** property and click **OK**. You will be returned to the Validation Results page.

The screenshot shows the 'Status' section of the 'Validate for Production' dialog. The 'Active' checkbox is selected and highlighted with a red box. Below it are options for 'Requires Approval' and 'Default approver'. The 'Default approver' field is empty, and there is a 'BROWSE...' button next to it. At the bottom are 'CANCEL' and 'OK' buttons.

4. Click **Validate for Production** again.



5. Click the **MOVE TO PRODUCTION** button which should now be available.

Note:

- While it may seem counter intuitive to be moving the deactivated course to production, this step applies the settings that have changed such as deactivating the course.