This job aid allows learning administrators to schedule training (in-person/virtual) and make it available for learners and managers to self-register and register team members respectively.

**View Training on the LMS – [add link created in articulate]**

**Prerequisite**

You have to be in a **Local Administrator role** to be able to perform the steps outlined below. You cannot create a new **item** as that is done by the **1 super admin.** Make sure any new item that doesn’t exist in the catalogue is created before you follow the steps below.

**STEP 1**

Click on the **Learning Activities** dropdown and then **items**. You will see a familiar window on your right-side window. Click either **item title** or **item ID** to search for your courses. Click on the course when you find it.

*Tip: use keywords to search*

**Name Change: Scheduled offering is now Classes**

---

1 lms.help@utoronto.ca
STEP 2

1. Click the **Actions** drop down tab on the top right. Click on **Schedule**.

   ![Schedule Tab]

   **Tip:** Edit, Update, Fill **Item details** after you edit the class details. See Step 4.

2. Fill the required information. Enter the **Start Date** and **Start Time**. Select the **Facility**, **Primary Location** and **Primary Instructor**.

3. Click **Save** at the bottom of the window.
Tip: Enter time format as 9:00AM. Use magnifying glass to search for the instructor you want to add.

Optional 1 - Adding Costs for No-Shows

1. If you plan to charge for No Shows or perform Chargebacks for classes, custom columns will need to be added to the registration form.

2. In the Registration Form Custom Columns section of the screen at the bottom, click the green Add button next to Custom Columns and select Custom Columns in the dropdown list.

3. Email lms.help@utoronto.ca if this is your first-time adding costs for guidance.

STEP 3 – Edit Class details

Layout Change: View all tab replaced by new interface. Please see below.

You will be taken to the Classes Detail page to make additional changes.

After you create your class, you will have to make adjustments and additions to the class details. This is similar to the view all tab in the previous scheduled offering, but the layout has been changed slightly. Highlighted in yellow in the image below is what you need to enter.
**University of Toronto, LLC**  
**SuccessFactors LMS**  
**Admins - Create Classes**

### 3.0 - Job Aid

This job aid allows learning administrators to schedule training (in-person/virtual) and make it available for learners and managers to self-register and register team members respectively.

---

**Class Search**  
**Organizational Management**  
223

**Start Date:** 5/22/2020 09:00 AM  
**End Date:** 5/22/2020 12:30 PM  
**Time Zone:** Eastern Standard Time (Canada/Eastern)  

**Instructor:** Luke Pereira  
**Location:** OOLC Main Conference Room 610 (STGHR-UON-610)  
**Enrolled:** 0  
**Status:** Active  
**Waitlisted:** 0  
**Open Seats:** 15

---

**Class Time Zone:**  
**Eastern Standard Time (Canada/Eastern)**

**View Times in the Class Time Zone:**
- Yes  
- No

**General**

**Description:**

**Primary Instructor:** Luke Pereira

**Registration Close Date:**

**Last Date to Withdraw:**

**Withdraw End Time:**

**Facility:** 215 Huron St., Toronto (STGHR-UON)

**Registration Close Time Zone:**
- Eastern Standard Time (Canada/Eastern)

**Withdraw End Time Zone:**
- Eastern Standard Time (Canada/Eastern)

**Require Withdrawal Reason:**
- Yes  
- No

**Access Settings**

**Security Domain:** VP Human Resources (VP-HR)

**Status:**
- Active

---

**Email Confirmation for Admin-Initiated Actions**

**Email confirmation to the Instructor:**
- Yes  
- No

**Email confirmation to the Contacts:**
- Yes  
- No

---

**Email Confirmation for User-Initiated Actions**

**Email confirmation to the User:**
- Yes  
- No

**Email confirmation to the Instructor:**
- Yes  
- No
**3.0 - Job Aid**
This job aid allows learning administrators to schedule training (in-person/virtual) and make it available for learners and managers to self-register and register team members respectively.

<table>
<thead>
<tr>
<th>Email confirmation to the Contacts:</th>
<th>Email Confirmation to the Reservation Owner:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Yes  [ ] No</td>
<td>[ ] Yes  [ ] No</td>
</tr>
</tbody>
</table>

**Email Confirmation for User-Initiated Actions**

<table>
<thead>
<tr>
<th>Email confirmation to the User:</th>
<th>Email confirmation to the Manager:</th>
<th>Email confirmation to the Instructor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Yes  [ ] No</td>
<td>[ ] Yes  [ ] No</td>
<td>[ ] Yes  [ ] No</td>
</tr>
</tbody>
</table>

**VLS Settings**

- Automatically add to learning history as part of VLS Attendance Processing:
  - [ ] Inactive

**Minimum Percentage Attendance for Credit:**

<table>
<thead>
<tr>
<th>Registration Settings</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Minimum Enrollments:</th>
<th>Maximum Enrollments:</th>
<th>Registration Status:</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>15</td>
<td>D of 15 enrolled, 0 waitlisted</td>
</tr>
</tbody>
</table>

**User can Self-Register:**

- [ ] Yes  [ ] No

**Manager can Register Others:**

- [ ] Yes  [ ] No

**Auto Enroll from Waitlist:**

- [ ] Yes  [ ] No

**Unassign Item When Admin Withdraws:**

- [ ] Yes  [ ] No

**Approval Process**

<table>
<thead>
<tr>
<th>Approval Required:</th>
<th>Approval Required to Withdraw:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Yes  [ ] No</td>
<td>[ ] Yes  [ ] No</td>
</tr>
</tbody>
</table>

**Withdraw Approval Process:**

- [ ] One Level of Approval for Internal Items (1 Step)  [ ]

**Completion**

<table>
<thead>
<tr>
<th>Certificate Template:</th>
</tr>
</thead>
</table>

**Administrative Use Only**

<table>
<thead>
<tr>
<th>Default Price:</th>
<th>Cancelled:</th>
<th>Cancelled Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00 Canadian Dollar (CAD)</td>
<td>No</td>
<td>-</td>
</tr>
</tbody>
</table>

[Save]  [Cancel]
3.0 - Job Aid
This job aid allows learning administrators to schedule training (in-person/virtual) and make it available for learners and managers to self-register and register team members respectively.

STEP 4 – Changing and Adding Locations

1. Changing location is still a 2-step process. Under the Class, click on facility and select a physical location. Please note, these just provide you with a list of the buildings. If your building available, please email lms.help@utoronto.ca to have it added in. You still have to change the Primary Location to the left of it. This is done by clicking on the Agenda tab.

   **TIP: If you have a virtual session, select Virtual Online under Facility**

2. After you click the Agenda tab, you will be taken to the screen where you can edit the date, time and location further by clicking the 3 dots on the right and clicking on Edit Time Slot.
3.0 - Job Aid
This job aid allows learning administrators to schedule training (in-person/virtual) and make it available for learners and managers to self-register and register team members respectively.

3. You can edit the date time. Add location corresponding to the facility in the previous screen. Add additional instructor also. Click **Save** when done.

<table>
<thead>
<tr>
<th>Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational Management</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Start Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/14/2020</td>
<td>09:00 AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>End Date</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/14/2020</td>
<td>12:30 PM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time Zone</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern Standard Time (Can)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Virtual</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Off</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resources</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Resource Type &amp; Resource</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>INSTRUCTOR</td>
<td></td>
</tr>
<tr>
<td>Luke Pereira</td>
<td></td>
</tr>
</tbody>
</table>

| LOCATION | ODLC Main Conference Room 610 |  |

<table>
<thead>
<tr>
<th>Add Location</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>INSTRUCTOR</td>
<td></td>
</tr>
<tr>
<td>Luke Pereira</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add Location</th>
<th>Delete</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>INSTRUCTOR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luke Pereira</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Save</th>
<th>Cancel</th>
<th></th>
</tr>
</thead>
</table>


4. Resend registration confirmation to staff after editing existing classes.

**Resend Registration: The location has changed on the UI. Now under Actions.**

*If you are editing an existing session* with new date, time or location only *with staff already registered*, you will want to click on re-send the registration confirmation details. Else they will not receive the updated email and calendar invites.

A pop up will follow. Click Yes.
3.0 - Job Aid
This job aid allows learning administrators to schedule training (in-person/virtual) and make it available for learners and managers to self-register and register team members respectively.

For your classes to show up in the catalog, make sure to check the libraries tab and that Global library is showing. If not, click the plus icon to add your class to the category.