

ILS Easy Course Creation (ECC) Overview

Configuration and Administration

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Table of Contents

1	Introduction	4
2	Easy Course Creation Overview	5
2.1	What is Easy Course Creation?	5
2.2	Easy Course Creation Use Cases	5
2.3	Benefits of Easy Course Creation	6
2.4	Considerations of use	6
3	Configuring Easy Course Creation	7
3.1	External Course Configuration	7
3.1.1	External Course Type	7
3.1.2	External Course Templates	10
3.1.3	External Course Creation Workflows	11
3.1.4	External Course Navigation	14
3.1.5	External 'Booking requests' panel	15
3.2	Easy Course Creation Configuration	17
3.2.1	Course Type / Course Template Updates	17
3.2.2	Course Creation Workflows	18
3.2.3	Easy Course Creation Navigation	23
4	Easy Course Administration	27
4.1	Recording and Requesting External Courses	27
4.2	External course approvals	30
4.3	Easy Course Creation (Manager / Admin)	31
4.4	Easy Course Management	38
4.4.1	Easy Course Attendance Tracking	39
4.4.2	Easy Course Reporting	39
4.5	Course tutoring	40

1 Introduction

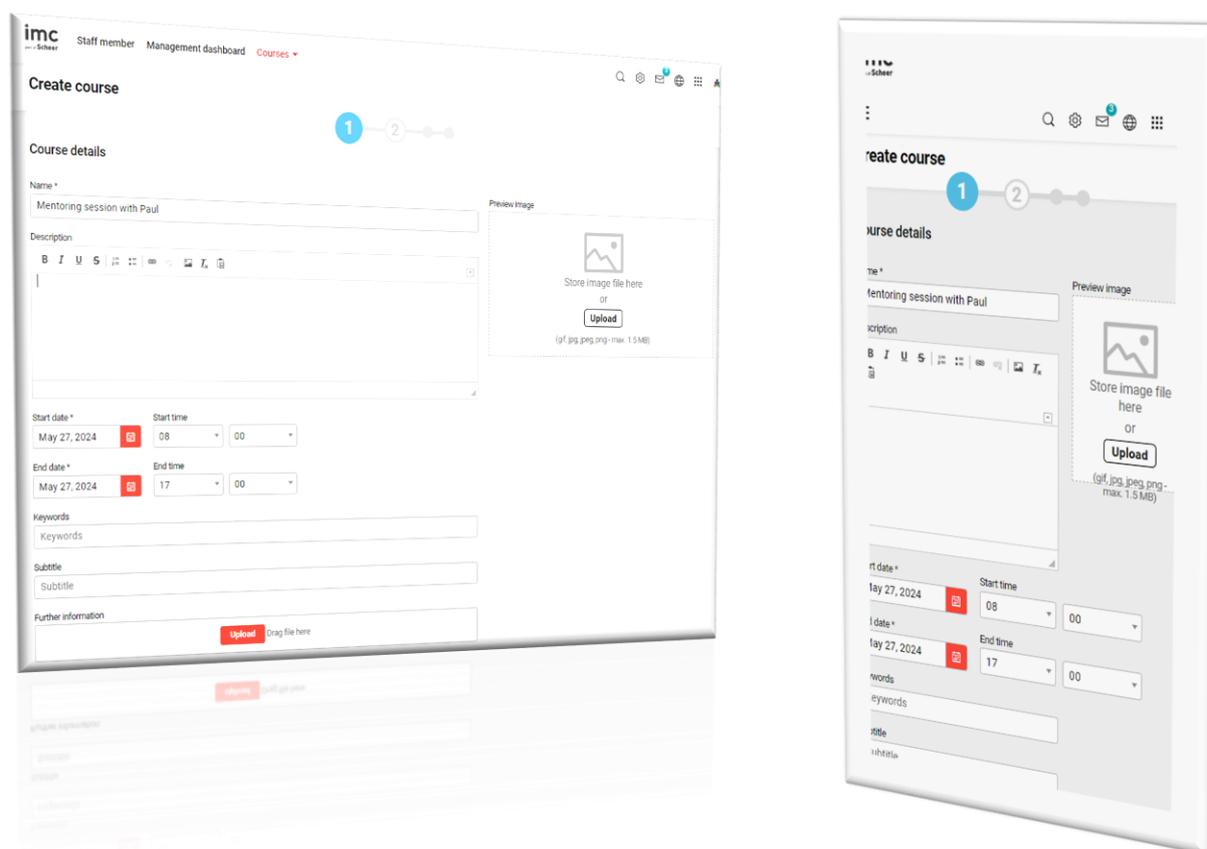
This document is an overview guide for the imc Learning Suite 'Easy Course Creation' function. The guide includes sections with functional overviews including use cases, details on how to configure the functions from scratch, and steps for administering each function.

2 Easy Course Creation Overview

This chapter provides an overview of the Easy Course Creation functionality including the benefits and possible use cases, before educating on configuration and administration steps.

2.1 What is Easy Course Creation?

The 'Easy Course Creation' is a modernised and simplified method to create courses from existing templates in the Learning Suite front end view using a step-based approach. Management of courses to add participants and mark attendance is also simplified. The simplified design is additionally responsive to ensure that creation and management of courses is possible on mobile devices.



2.2 Easy Course Creation Use Cases

The original requirement stemmed from a client in the Sports sector where volunteer coaches needed to be able to create training sessions on mobile devices with planned activities selected from a library of drills (media) and mark attendance against the attending athletes. Since the initial release Easy Course Creation has evolved into a more flexible solution that considers the following main use cases:

- **External courses** (Learner)
 - Request trainings not held in LMS with approval process.
 - Record external training activities with/without approval process.

- This includes ability to track Certification points/hours (Add-on module), add linked Skill assessments, and upload external acquired certificates.
- **Quick course session creation** (from existing templates)
 - Admins and Trainers to quickly create own date-dependent sessions.
- **Course management by tutor** to view and edit components.

Some other possible use cases for Easy Course Creation include:

- **User generated courses**
 - The function could be used to allow learners to create their own courses. For example, the templates available to learners could be directly assigned to an own catalogue with courses automatically displayed in catalogues via the assigned course template.
- **Setting up mentoring sessions** where senior staff could create courses to represent available times to help other staff.
- **Staff training** with managers creating/recording ad hoc trainings for their staff.

2.3 Benefits of Easy Course Creation

There are many benefits related to using Easy Course Creation including:

- Quicker method to create courses.
- Simple step by step process removes complexities.
- Responsive design enables course creation on any device.
- Simplified interface is intended more for managers, trainers and learners.
- Direct linking of specific workflows to navigation points, E.g. pre-selected templates.

2.4 Considerations of use

Before deciding whether to use Easy Course Creation there are a couple of key considerations. The most important consideration with Easy Course Creation is that only 'single' language course templates can currently be used to describe the course, but multi-language media content is considered.

Execute clearances to course templates must be granted to groups that need to create courses via Easy Course Creation functions.

If on existing course template 'Description' tabs the 'Usable for course creation workflow' is not active and not editable the course templates will not be usable. This occurs when the course type from which the course template is derived does not have the 'Usable for course creation workflow' setting active and in the 'Process complexity' tab the setting is not ticked as editable. In cases where such course templates are definitely required a database script might be required; if so, raise with the imc Support team; this would require 2nd level support.

3 Configuring Easy Course Creation

Like many functions the Easy Course Creation is not configured by default. There are a few steps involved in the configuration process including creation of navigation points, creation of workflows, and updating course types as well as course templates. All of these steps will be explained in detail below:

3.1 External Course Configuration

External Courses also use the Easy Course Creation function. These External Courses allow learners to 'Request' or 'Record' external training activities against their learning records, but by default these courses are not visible elsewhere in the LMS such as in the 'Courses' admin function or course reports; however it is possible to enable a setting in 'Settings > Configuration > Course' called 'Show external courses' that will display external courses in 'Admin > Content > Course administration > Courses' where administrators will be able to edit to make changes.

The screenshot shows the 'Record' page in the LMS. At the top, there is a navigation bar with the imc logo and several menu items: Home, Catalogue, Learning status, Calendar, Create mentor sessions, Record external course (highlighted in red), and Request external course. There are also search, settings, and notification icons. Below the navigation bar, the page title is 'Record'. Underneath, there is a section titled 'Select template' with a search input field and a red 'Search' button. Below this, it says '2 Content(s) available'. There are two content items listed: 'Conference' with a sub-tag 'Classroom training' and 'Practical experience' with a sub-tag 'Online'. Each item has a small icon and a dropdown arrow on the right.

3.1.1 External Course Type

The first configuration step is the creation of new external course types in the 'Course types' menu. New course types will need to be created where the checkbox meta tags 'External course' and 'Usable for course creation workflow' are ticked; note the 'External course' meta tag must be ticked before saving. If both 'Date dependent' and 'Duration of use' release modes are required, then two external course types will need to be created. In terms of 'Languages' the Easy Course Creation on supports single language course types / course templates so only ensure a single language is used.



New: Course type

Course type

Description
Meta tags and attributes
Languages
Default values
Process complexity
Cancellation fees

Created	Update	Object ID
19-Mar-2024 00:54 (imc Super)	19-Mar-2024 00:54 (imc Super)	123652

Status (i)

Active
▼

Learning mode* (i)

☰

External course (i)

Usable for course creation workflow (i)

Release mode (i)

Date-dependent
▼

Conditional pre-booking (i)

No
▼

Language-specific area:

English (GB), French, German

English (GB)

Name* (500 characters max.)

It's recommended to keep the number of meta tags available for learner population to a minimum to avoid any unnecessary confusion. This is performed in the 'Meta tags and attributes' tab 'Editable for course' column by only setting the display option 'Editable' for required meta tags; all other metatags can be set to 'Do not display'.

External date dependent
 Edit Course type 123676 saved: 19-Mar-2024 09:00:33

Description **Meta tags and attributes** Languages Default values Process complexity Cancellation fees

Name	ID	Editable for course templ...	Editable for course	Automatic...	Visible before enrolment	Visible after enrolment	Visible in course room
Basic information	123679				Do not display title	Do not display title	
Name	10000	Required	Required	<input type="checkbox"/>	Description area	Description area	<input checked="" type="checkbox"/>
Description	10001	Editable	Editable	<input type="checkbox"/>	Description area	Description area	<input checked="" type="checkbox"/>
Preview image	10950	Editable	Editable	<input type="checkbox"/>	Do not display	Do not display	<input type="checkbox"/>
Planning status	10072	Required	Do not display	<input type="checkbox"/>	Description area	Description area	<input checked="" type="checkbox"/>
Course room type	10750	Required	Do not display	<input type="checkbox"/>	Do not display	Do not display	<input type="checkbox"/>
Administrator	10007	Do not display	Do not display	<input type="checkbox"/>	Description area	Description area	<input type="checkbox"/>
Provider	10069	Do not display	Do not display	<input type="checkbox"/>	Description area	Description area	<input type="checkbox"/>
Enrolmentform set	11817	Editable	Do not display	<input type="checkbox"/>	Description area	Description area	<input type="checkbox"/>
Cost centre	10141	Do not display	Do not display	<input type="checkbox"/>	Description area	Description area	<input type="checkbox"/>
Location	10097	Do not display	Do not display	<input type="checkbox"/>	Description area	Description area	<input type="checkbox"/>
Training execution	10073	Editable	Do not display	<input type="checkbox"/>	Do not display	Do not display	<input type="checkbox"/>
Allow rating	10770	Editable	Do not display	<input type="checkbox"/>	Do not display	Do not display	<input type="checkbox"/>
Progress display	11805	Editable	Do not display	<input type="checkbox"/>	Do not display	Do not display	<input type="checkbox"/>
Enable content preview	11803	Do not display	Do not display	<input type="checkbox"/>	Do not display	Do not display	<input type="checkbox"/>
Alternative Location	112235	Editable	Editable	<input type="checkbox"/>	Description area	Description area	<input checked="" type="checkbox"/>
Pricing/cost	123680				Do not display title	Do not display title	
Price	10033	Do not display	Do not display	<input type="checkbox"/>	Do not display	Do not display	<input type="checkbox"/>
External price	10128	Do not display	Do not display	<input type="checkbox"/>	Do not display	Do not display	<input type="checkbox"/>
Duration and access	123681				Do not display title	Do not display title	
Start date	10004	Do not display	Required	<input type="checkbox"/>	Description area and ke	Description area and k	<input checked="" type="checkbox"/>
End date	10005	Do not display	Required	<input type="checkbox"/>	Description area and ke	Description area and k	<input checked="" type="checkbox"/>
Duration of use	10068	Do not display	Do not display	<input type="checkbox"/>	Do not display	Do not display	<input type="checkbox"/>

With external course types the standard meta tags 'Name' and 'Description' are most important along with 'Start date' and 'End date' if date-dependent. Other important standard meta tags are 'Price' for request workflows, 'Enrolment type' if approvals are required, and 'Course may be concluded by' to determine how the course is set as completed. It's likely required to configure some new meta tags in the 'Meta tags' menu to better enable learners to describe the external trainings. For example, new text fields for External Provider and External Location are common as the standard meta tags for these relate to internal objects.

Once the meta tags display settings are complete move to the 'Description' tab to set the meta tag default values. This is especially important for settings that will not be visible to the learner when creating the external courses; E.g. setting the 'Enrolment type' with manager or administrator approvals and 'Course conclusion by' learner or administrator. Also ensure the 'Planning status' is set to 'Released'.

The 'Process complexity' tab is the final area of the course type to configure and determines the tabs/steps available when the learner is creating external courses. Typically, options enabled would be 'Modifiable template attributes' and 'Meta tag' to enable administrators changing settings at the course template level; 'Components' can be enabled if allowing the learner to upload media, also 'Skill management' and 'Certifications' are important if the learners are permitted to record external activities that award required Skills or for tracking of 'Certification' points/hours for assigned accreditations.



External Course

Edit Course type 119231 saved: 20-Jun-2024 10:11:42

Description
Meta tags and attributes
Languages
Default values
Process complexity
Cancellation fees

Modifiable template attributes ⓘ

- Learning mode
- Usable for course creation workflow
- Release mode
- Conditional pre-booking

Meta tag

- Meta-tag settings can be changed at course-template level

Components

- Display component tab to define syllabus at course-template and course level

Learning logic

- Learning logic can be defined at course-template and course level

Classifications

- Classify courses of this type

Skill management

- Display skill tab for course templates and courses

Certifications

- Displays the certification tab for course templates and courses

Social media

- Display social-media tab at course-template and course level

Library

- Display library tab at course-template and course level

Offline tests/feedback forms

- Display offline-test/feedback-form tab at course-type and course level

Tutors / Partners

- Display tutor tab at course-template and course level

3.1.2 External Course Templates

The next step is to create course templates from the new external course types. This is because the learner must create their external courses from existing course templates that are flagged for 'External course' use. When creating the course templates think of all the types of external training that will be required for a learner to select from when requesting or recording and the fields that will be required to populate; E.g. Seminar, Conference attendance, External qualification, Mentoring session, Self-study, Certification, Online course...

Adjust the meta tags and the default values as required for the type of external course template being created. When approvals are required from some external course request or recording the 'Enrolment type' will need a self-enrolment workflow with the desired approver (Supervisor or Administrator). Also ensure the planning status is 'Released' and on saving use the 'Save & Publish' option.

If using the 'Skills' or 'Certification' functions to allow learners to add skill achievements or acquired points/hours against assigned accredited certifications, specific course templates can be created with the relevant skills or certification pre-assigned to reduce the need for the learner to add the certification.

Finally, as general users will be using these external course templates ensure 'Execute' clearance is provided to the groups or client that will need to use them.

3.1.3 External Course Creation Workflows

The Easy Course Creation menus use pre-defined workflows to determine what steps will be possible when creating courses. These workflows are defined in the 'Course creation workflow' function generally found in the 'Settings > Content' menu path.

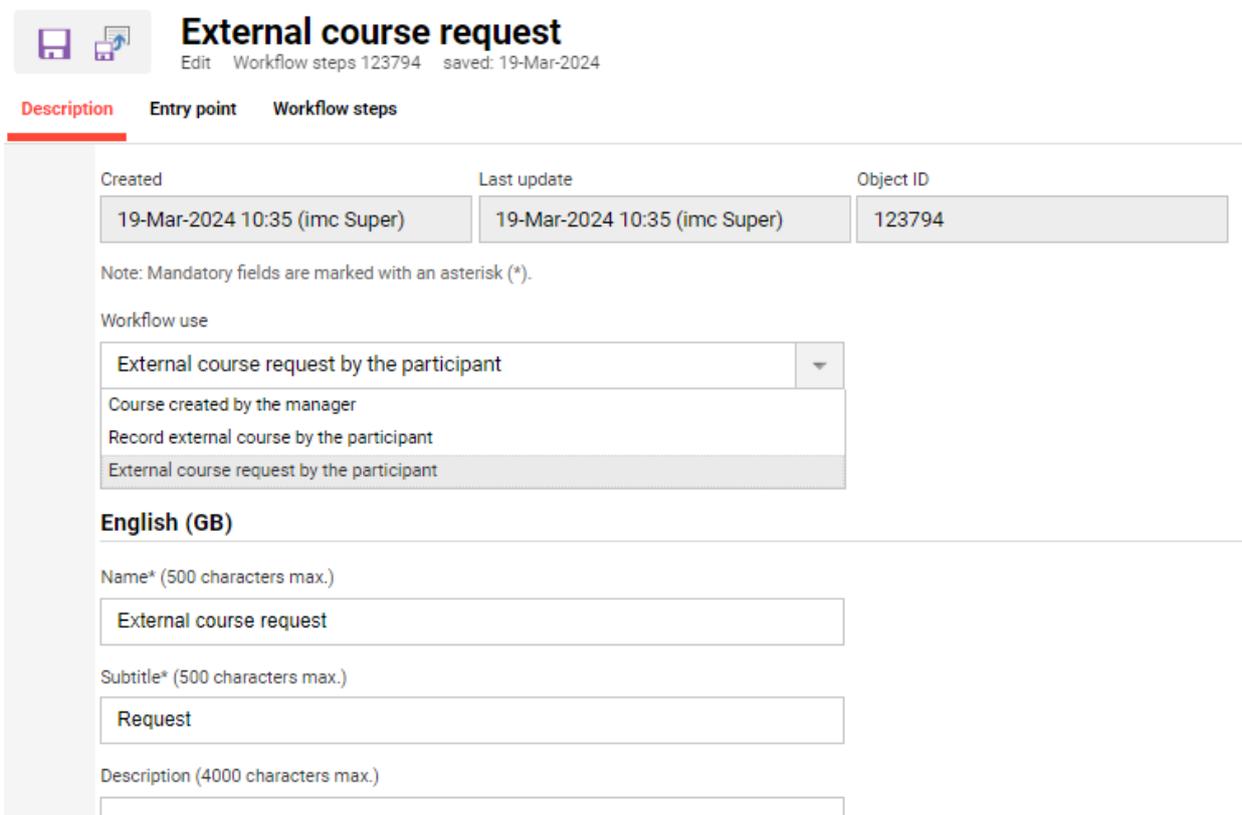
The screenshot shows the 'Course creation workflow' management interface. At the top, there is a navigation bar with 'imc part of Scheer' and menu items: People, Content, Assignment, Tutoring, Reports, Videos. On the right, there are icons for search, settings, notifications (3), and a globe. The main content area is titled 'Course creation workflow' and features a search bar with 'All contents' selected and a search term field. Below the search bar is a table with the following data:

Name	ID	Last update
External course request	123794	19-Mar-2024 10:35
Mentoring session	123824	19-Mar-2024 11:06
OB Test Workflow	115763	15-Nov-2023 10:33
Record external course	123653	19-Mar-2024 02:00

At the bottom of the table, there is a pagination control showing 'Hits per page: 100' and 'Page 1 of 1'. On the right side, a navigation menu is visible with the following items: Content, Course types, Learning modes, Learning path types, Course room types, Course creation workflow (highlighted), Media types, Offline layouts, Test player, Feedback-form player, Meta elements, Cost centres, Meta tags, External service providers, Classifications, and Certificates and notification templates. The bottom right corner of the menu shows '- 4 of 4'.

Note: If the 'Course creation workflow' navigation point is not available it might be 'Inactive' or require creation. The latter can be created in the navigation by creating a new Default menu (Navigation > Create > Menu), choosing 'Course creation workflow' as a default menu type and set the identifier as 'course_creation_workflow'.

The first step when creating a new course creation workflow in the 'Description' tab is deciding the 'Workflow use' setting which for external courses this is either 'Record external course by the participant' or 'External course request by the participant'. Select the desired 'Workflow use' option, then enter values in the 'Name' and 'Subtitle' fields. The text defined as subtitle for the workflow will be the text displayed as a workflow name in the front end. For each step, the name and the description will be displayed to the user while navigating through the steps in the workflow.



External course request
Edit Workflow steps 123794 saved: 19-Mar-2024

Description Entry point Workflow steps

Created	Last update	Object ID
19-Mar-2024 10:35 (imc Super)	19-Mar-2024 10:35 (imc Super)	123794

Note: Mandatory fields are marked with an asterisk (*).

Workflow use

External course request by the participant

Course created by the manager

Record external course by the participant

External course request by the participant

English (GB)

Name* (500 characters max.)

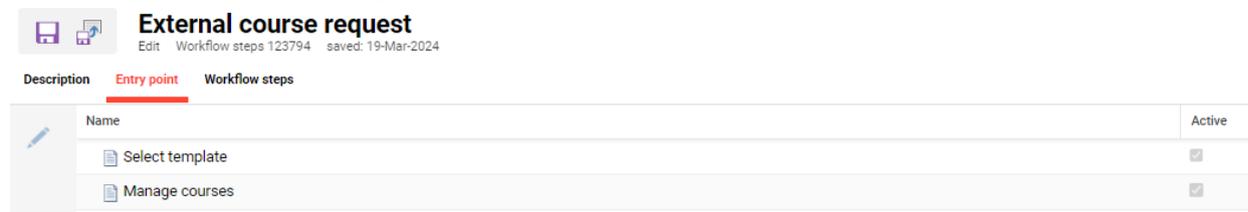
External course request

Subtitle* (500 characters max.)

Request

Description (4000 characters max.)

Next is the 'Entry point' tab whereby default the 'Select template' and 'Manage courses' steps are active with further edit options.



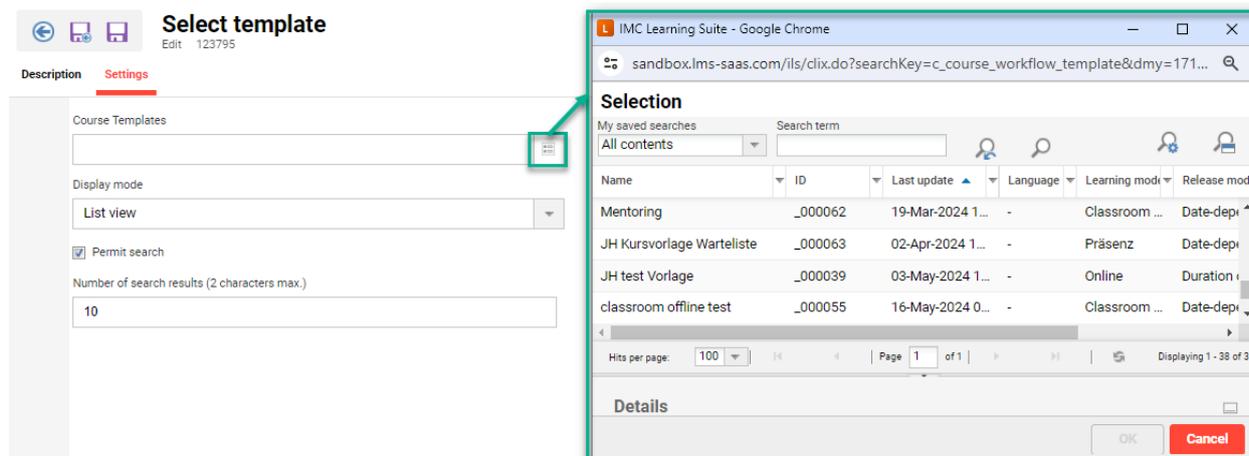
External course request
Edit Workflow steps 123794 saved: 19-Mar-2024

Description Entry point Workflow steps

Name	Active
Select template	<input checked="" type="checkbox"/>
Manage courses	<input checked="" type="checkbox"/>

Highlight 'Select template' and click the 'Edit' icon. The step can be renamed in the 'Description' tab and options defined in the 'Settings' tab.

- **Course Templates:** Allows limiting the workflow to automatically select a specific course template. If a course template is selected the following options are irrelevant.
- **Display mode:** Determines if course templates are shown in list or tiled (map) view.
- **Permit search:** Shows a search box to search for course templates by name and description. This option makes more sense for Easy Course Creation rather than external course workflows.
- **Number of search results:** Limits the number of search results and if there are further non-displayed results a 'Show more' button will be presented.

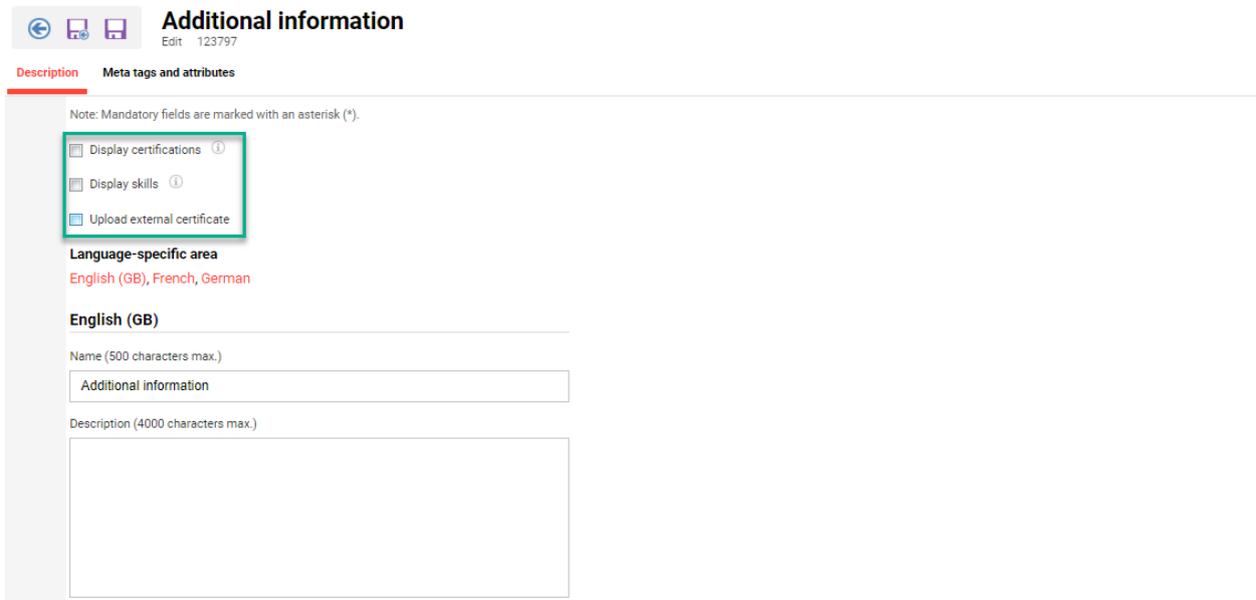


Once options are set click the 'Save & back' icon to return to the 'Entry point' screen. The remaining option of 'Manage courses' is not so relevant to external courses and can be ignored.

Finally, the 'Workflow steps' are to be defined which control the tabs shown during the creation process. For external course workflows the 'Additional information' is the only important option to edit and the others can be ignored unless it is desired to allow users to upload content.



In the 'Description' tab are three important checkboxes that are relevant to some external course recording scenarios. These are 'Display certifications' for where accredited certification points/hours can be earned via external training activities, 'Display skills' where external training can deliver a skill managed in the LMS (E.g. First aid, Project Management), and 'Upload external certificate' to serve as evidence of completion. The 'Meta tags and attributes' tab enables adding additional meta tags for the user to populate that may not be available in the external course templates.

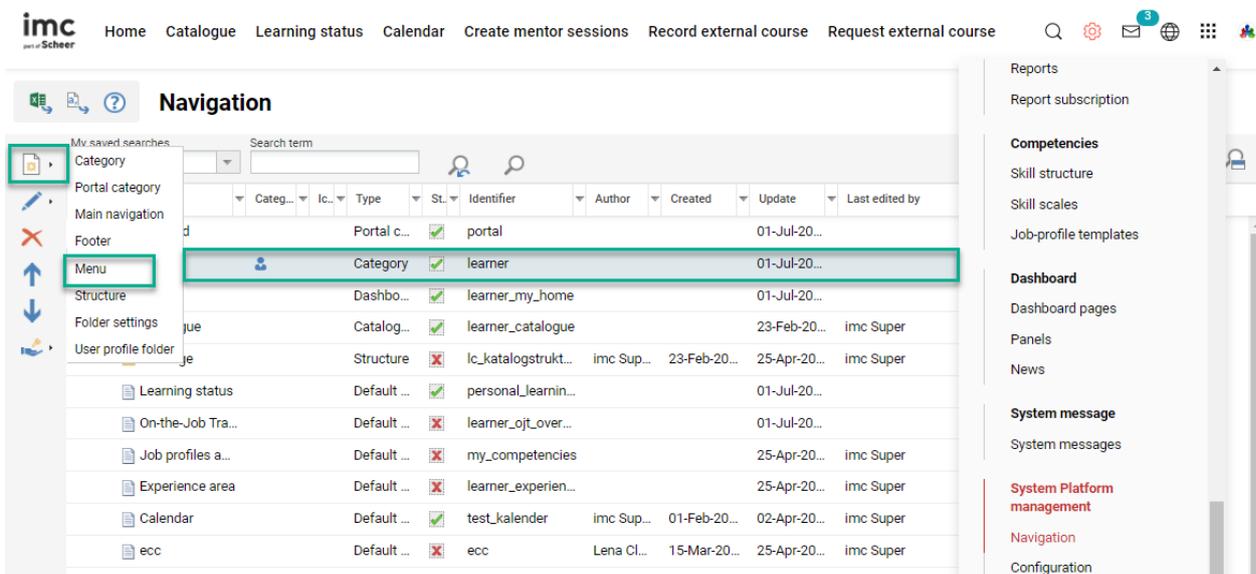


Once finished click 'Save and back' and then 'Save and close' to finalise the workflow. Like with external course templates, clearances will need to be provided on the workflows for the learner groups requiring access to record or request external courses.

If additional external workflows are required duplicating an existing workflow can save time.

3.1.4 External Course Navigation

Once the external course types, external course templates, and external course creation workflows are created, then next step to configure is the navigation points for the users to record or request their external trainings. To configure this either search for 'Navigation' or go to 'Settings > System Platform management > Navigation'. The new navigation points would normally be in the 'Learner' category. To start the creation process, click on the 'Learner' category to highlight, then click the 'Create' icon and select the 'Menu' option.



When creating a new menu complete the following steps:

1. The first field to populate is the 'Identifier' which will require a unique text value to be entered without spaces; it is recommended to name similar to the workflow.
2. The 'Status' will need to be Active for the menu to be usable.

3. The 'Menu type' will need to be set as 'Default menu' as Easy Course Creation is a standard function and this will then display a 'Default menu' selection field.
4. Click the 'Default menu' to launch a popup window that contains all standard functions. Search for 'Easy' or 'Simplified', select 'Simplified course creation' and click 'OK'.
5. The 'Use' option for external courses will be 'Created'.
6. Next choose the 'Workflow' to be used for the new navigation point.
7. Decide if the 'Destination' will be 'Same tab' or 'New tab'.
8. Enter a 'Name' for the new navigation point in each system language.
9. In the 'Access rights' tab add the groups that will require access to the new menu.
10. Once population is complete click 'Save and back'.

The screenshot displays the 'Navigation' configuration interface. The 'Default menu' is set to 'Simplified course creation', and the 'Workflow' is set to 'External course request'. Two popup windows show search results for 'easy' and 'external' respectively, with 'Simplified course creation' and 'External course request' selected.

The new navigation point will now be ready, but to view this will require logging out and then logging back into the system as navigation will not update live during a session.

Note: In a default configuration this would require a 'System administrator' or 'Super administrator' role to perform navigation configurations.

Note: If multiple external workflows are required for different workflows repeat the above process to create multiple navigation points.

Note: If creating multiple navigation points it can be neater to structure these by first creating a 'Structure' instead of a 'Menu'.

3.1.5 External 'Booking requests' panel

If external course record and request workflows will require Supervisor or Administrator approval it will be needed to create a new 'Booking request' panel. This is done in the 'Panels' function by duplicating the standard 'Booking request' panel with ID 173.

ID	Updated	Type
148	01-Jul-2023 00:00	Report panel
135	01-Jul-2023 00:00	Report panel
134	01-Jul-2023 00:00	Report panel
149	01-Jul-2023 00:00	Report panel
177	01-Jul-2023 00:00	System panel
173	01-Jul-2023 00:00	System panel
105	01-Jul-2023 00:00	System panel
155	01-Jul-2023 00:00	Report panel
171	01-Jul-2023 00:00	System panel

Change the 'Request type' setting to 'External course request', change the 'Grouping' to 'Users', name the panel and title as required then 'Save and close'.

External course requests
 Edit System panel 125576 saved: 30-May-2024

Description

Created: 30-May-2024 09:53 (imc Super) | Last update: 30-May-2024 09:53 (imc Super) | Object ID: 125576

Note: Mandatory fields are marked with an asterisk (*).

Display all visible registration requests as they are released ⓘ

Request types
 External course request

Grouping
 Users

Language-specific area
 English (GB), French, German

English (GB)

Name* (400 characters max.)
 External course requests

Description (2000 characters max.)
 This panel allows authorised persons (e.g. supervisors, course administrators and HR managers) to decide on booking requests from learners in the Learning Portal and mobile apps. The prerequisite for this is access rights to the relevant user/participant administration of the respective course or a superordinate relationship.

Keywords (2000 characters max.)

Title* (50 characters max.)
 External course requests

The final step is assigning the new external course approval panel to either an existing or new dashboard page.

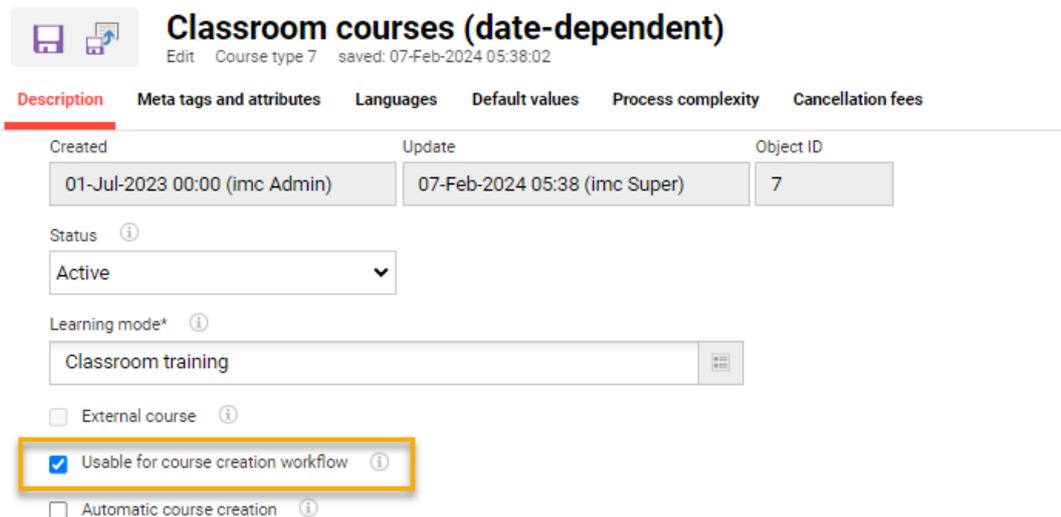
3.2 Easy Course Creation Configuration

The Easy Course Creation workflows are created very similar to the external course workflows with some subtle differences in the configuration of course types, course templates, course creation workflows and the navigation.

3.2.1 Course Type / Course Template Updates

With Easy Course Creation it does require a setting 'Usable for course creation workflow' to be enabled in the 'Description' tab of course templates. For this to be possible the course types must allow this by either:

1. In the 'Description' tab enabling the 'Usable for course creation workflow' which will default the setting for future course templates created from the course type.



Classroom courses (date-dependent)
Edit Course type 7 saved: 07-Feb-2024 05:38:02

Description Meta tags and attributes Languages Default values Process complexity Cancellation fees

Created	Update	Object ID
01-Jul-2023 00:00 (imc Admin)	07-Feb-2024 05:38 (imc Super)	7

Status ⓘ
Active ▼

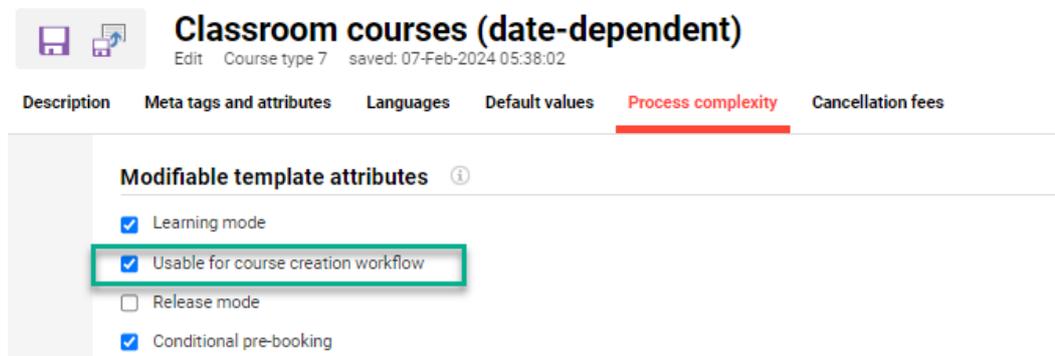
Learning mode* ⓘ
Classroom training

External course ⓘ

Usable for course creation workflow ⓘ

Automatic course creation ⓘ

2. In the 'Process complexity' tab enable 'Usable for course creation workflow'. This will allow the setting to be enabled and disabled in future course templates derived from the course type.



Classroom courses (date-dependent)
Edit Course type 7 saved: 07-Feb-2024 05:38:02

Description Meta tags and attributes Languages Default values Process complexity Cancellation fees

Modifiable template attributes ⓘ

Learning mode

Usable for course creation workflow

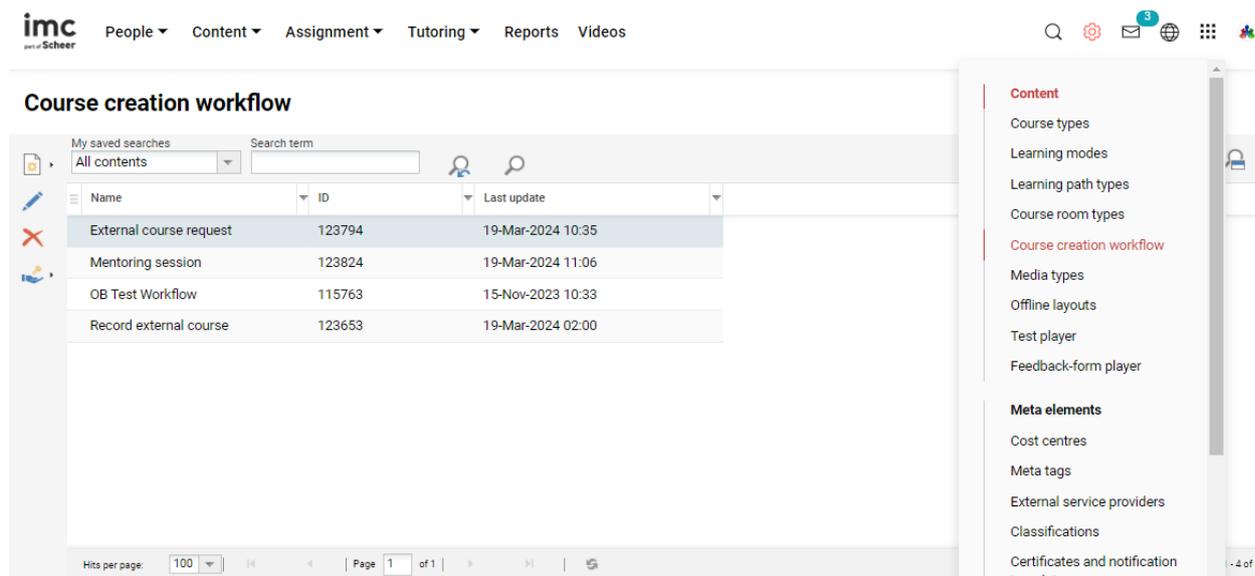
Release mode

Conditional pre-booking

Other than ensuring 'Usable for course creation workflow' is enabled the main needs are simplifying the number of editable meta tags at the course level by defining defaults at the course template and setting many non-important meta tags to 'Do not display' or 'Not editable'. Like with the standard course creating workflows clearances to the course templates will also be needed to create courses.

3.2.2 Course Creation Workflows

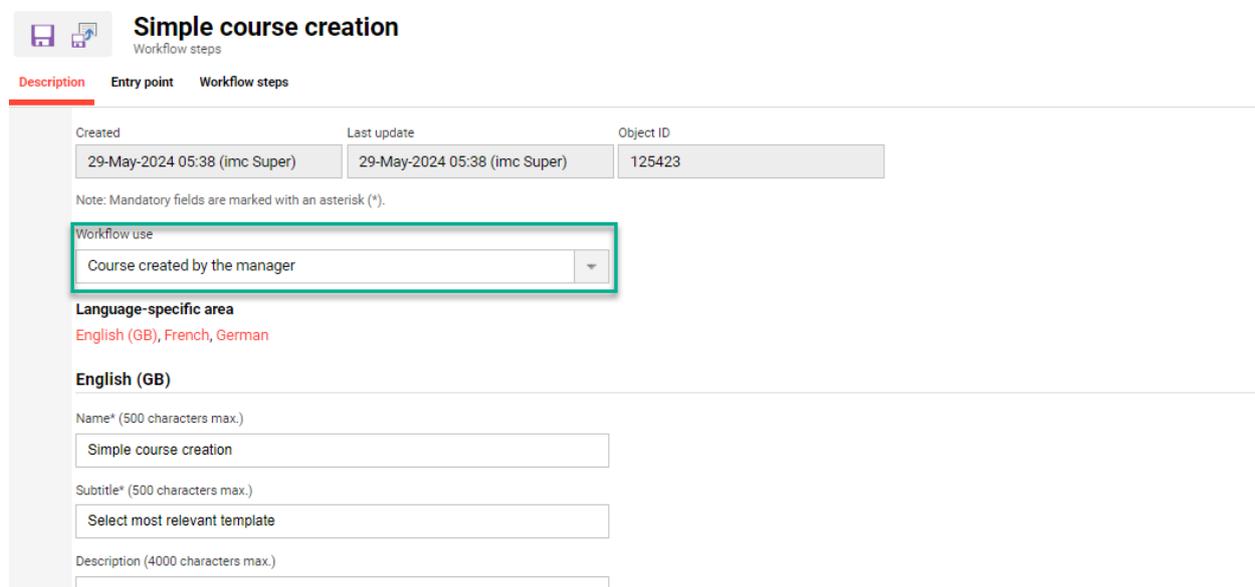
As mentioned in 3.1.3 the Easy Course Creation menus use pre-defined workflows to determine the steps that will be possible when creating courses. These workflows are defined in the 'Course creation workflow' function generally found in the 'Settings > Content' menu path.



Note: If the 'Course creation workflow' navigation point is not available it might be 'Inactive' or require creation. The latter can be created in the navigation by creating a new Default menu (Navigation > Create > Menu), choosing 'Course creation workflow' as a default menu type and set the identifier as 'course_creation_workflow'.

With Easy Course Creation consider the new workflows that will be required; E.g. are there workflows for specific course template selection or specific/limited steps needed in the creation process. Once identified start the creation process by clicking the 'Create' icon.

In the 'Description' tab the 'Workflow use' for Easy Course Creation will be 'Course created by the manager' which can basically be any user with access rights to the menu and clearance to course templates. Enter values in the 'Name' and 'Subtitle' fields as these will be displayed as a workflow name in the front end.

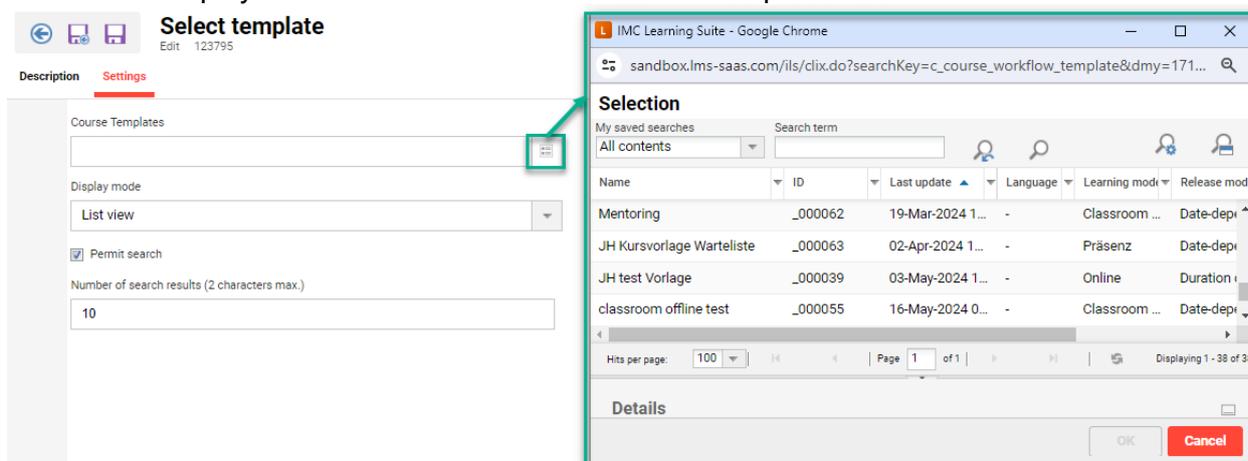


Next is the 'Entry point' tab whereby default the 'Select template' and 'Manage courses' steps are active with further edit options.



Highlight 'Select template' and click the 'Edit' icon. The step can be renamed in the 'Description' tab and options defined in the 'Settings' tab including:

- **Course Templates:** Allows limiting the workflow to automatically select a specific course template. If a single course template is selected the following options are not considered as the creation process automatically begins once navigation is clicked.
- **Display mode:** Determines if course templates are shown in list or tiled (map) view.
- **Permit search:** Shows a search box to search for course templates by name and description. This option makes more sense for Easy Course Creation rather than external course workflows.
- **Number of search results:** Limits the number of search results and if there are further non-displayed results a 'Show more' button will be presented.



Once options are set click the 'Save & back' icon to return to the 'Entry point' screen. Unlike external courses the remaining option of 'Manage courses' is important as the courses are intended to be managed. Editing the 'Manage courses' option will enable creating tabs based on the planning statuses of courses.



Finally, the 'Workflow steps' are to be defined which control the tabs shown during the creation process. With easy course creation all of the options are important and explained below:

- **Course details:** Default tab to enter details into editable course meta tags.
 - Not all meta tags are supported in the easy course creator.
- **Additional information:** Enables adding Certifications, Skills and other meta tags if not already contained in the selected course template when creating.

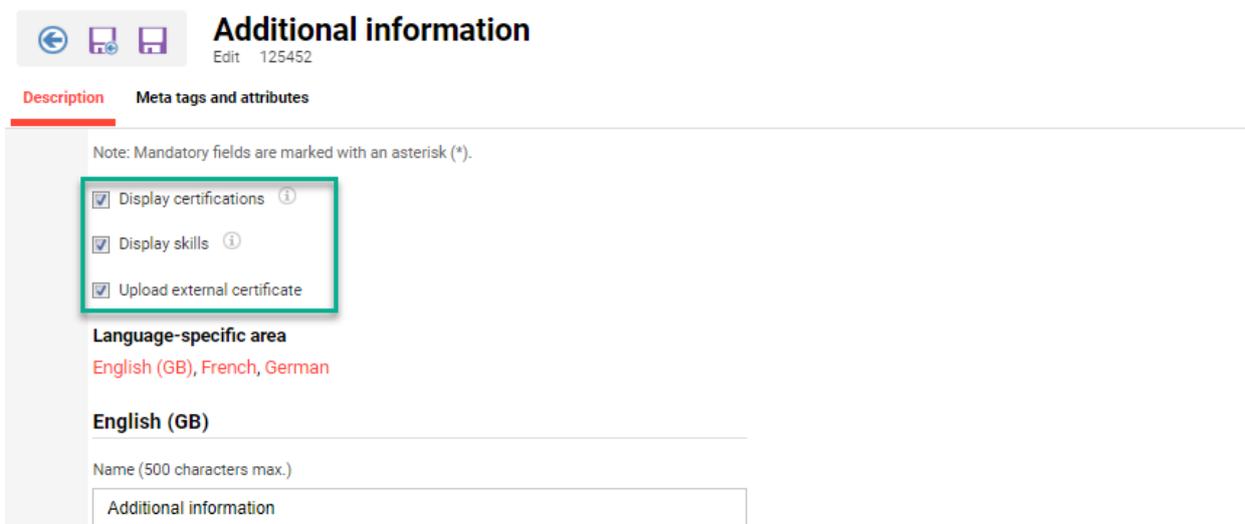
- **Add content:** Enables adding or uploading extra content to the course syllabus.
 - No component learning logic or scheduling rules are supported.
- **Add participants:** Enables directly adding participants by individual user search or finalised target groups (with assigned users) based on clearances.
- **Insert tutors:** Enables adding tutors based on clearances. No 'role' can be set.
- **Course overview:** Default tab that summarises the created course and provides an edit icon per section if changes are to be made.

Note: Administration in course manager depends on configuration. If those courses are displayed in the course manager, when clicking on edit a pop-up window opens where only description can be edited and editing of syllabus is not possible. Normal courses are opening in a new browser tab.

Tick the required workflows and each can then be further edited to define settings.



The 'Additional information' option 'Description' tab has three important checkboxes which are 'Display certifications' for where accredited certification points/hours can be earned by completing the course, 'Display skills' where completion can award skills, and 'Upload external certificate' to serve as evidence of completion. The 'Meta tags and attributes' tab enables adding additional meta tags for the user to populate that may not be available in the external course templates.



The 'Add content' option is important to Activate if the creator needs to update the course syllabus components. There are three options which are 'Add folder' to allow creation of syllabus folders, 'Add content' to allow adding existing content, and 'Create content' to allow uploading limited content formats.

Add content
 Edit 125427 saved29-May-2024 07:00:19

Description

Note: Mandatory fields are marked with an asterisk (*).

Add folder
 Add content
 Create content

Language-specific area
 English (GB), French, German

English (GB)

Name (500 characters max.)

Description (4000 characters max.)

Note: With the 'Create content' setting there is further configuration required in the 'Clients' function under the 'Settings' icon called 'Easy media upload' which requires linking of a single media type to five media formats.

People ▾ Content ▾ Assignment ▾ Tutoring ▾ Reports Videos

Clients

My saved searches: All contents | Search term:

Name	Object ID	Last update	Design	Overwritten in
Admin	2	22-May-2024 10:40	default	PROD
Customer	1	22-May-2024 10:36	default	
Support	125266	28-May-2024 11:36	default	

- Catalogue settings
- Learning area settings
- Competence settings
- Tiles settings
- Easy media upload

This is done in the 'Media type configuration for easy course creation' section.

Customer
 Edit Easy media upload 1

Media types

Created	Last update	Object ID
01-Jul-2023 00:00 (imc Super)	System	1

Media type configuration for channels

- Multimedia*
- File*
- Link*

Media type configuration for easy course creation

- Multimedia*
- File*
- Link*
- Event
- Activity

Media type configuration for IMC Express

- WBT (SCORM)

The 'Add participants' option has a few settings which are 'Allow saving of favourite groups' which is ideal for business unit supervisors, 'Allow changes to the booking status' which can be important in scenarios such as on-the-job training in courses that requires participants to have a 'Started' status to manage the tasks, and 'Show option for presence tracking'.

Add participants
 Edit 125428

Description **Settings**

- Allow saving of favourite groups
- Allow changes to the booking status
- Show option for presence tracking

The final configurable workflow option is 'Insert tutors' to allow adding tutors to created courses. The ability to add tutors will be determined by whether the creator has clearance to any users in 'Tutor' groups and whether the selected course template enables tutor selection. A setting enables the creator to save tutors as favourites.

Insert tutors
 Edit 125429

Description **Settings**

- Allow saving of favourite groups

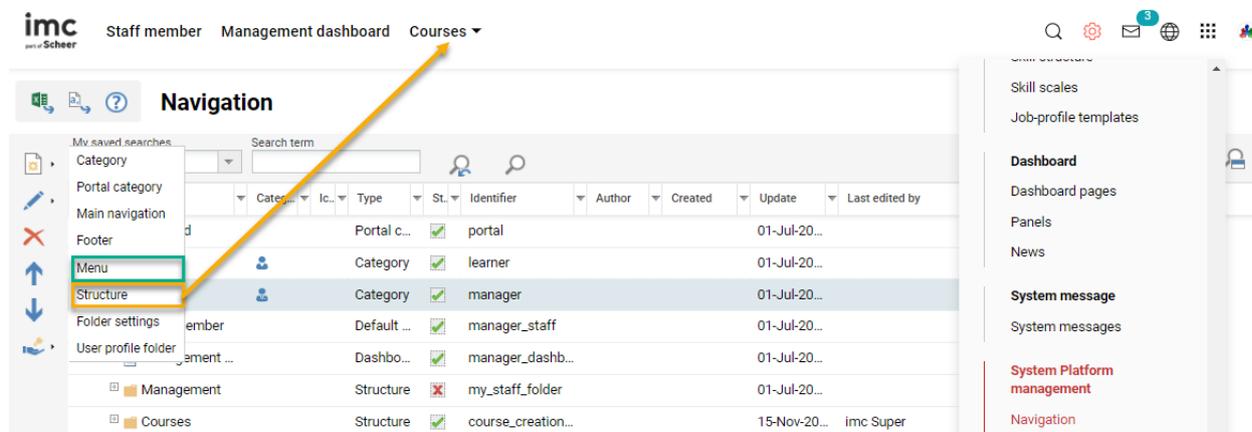
Once all workflow step configurations are complete click 'Save and close' to finalise the course creation workflow.

3.2.3 Easy Course Creation Navigation

Once the course creation workflows are complete the next configuration step is the creation of new navigation points if they do not yet exist. In terms of navigation points the easy course creation can be relevant to the Manager, Tutor and Admin roles meaning multiple navigation points are likely required.

Manager navigation:

To configure the manager navigation point search for 'Navigation' or go to 'Settings > System Platform management > Navigation'. To start the creation process, click on the 'Manager' category to highlight, then click the 'Create' icon and select the 'Menu' option; alternatively, if wanting to nest multiple menus under a structure first create a 'Structure'.

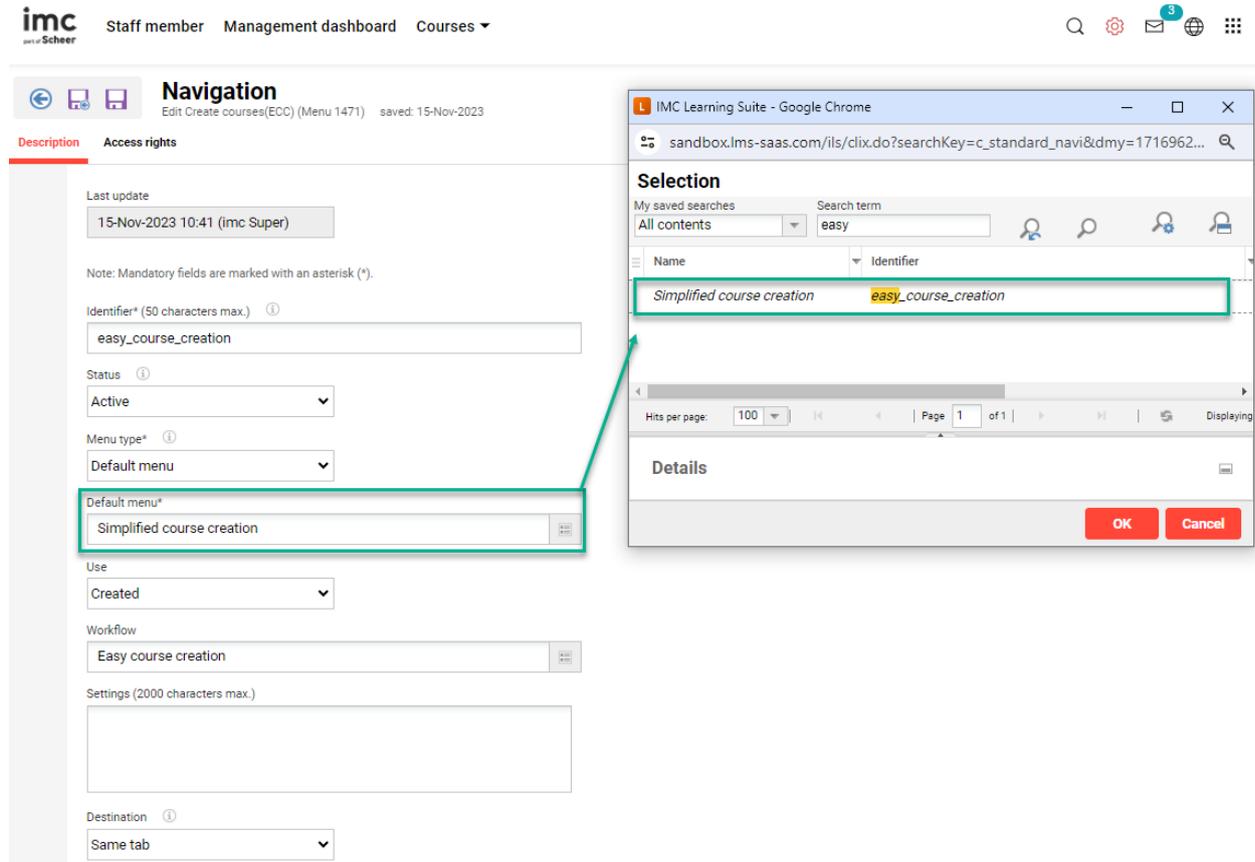


The screenshot shows the imc management dashboard. At the top, the user is logged in as a 'Staff member' and is viewing the 'Management dashboard' with a 'Courses' dropdown menu. The main content area is titled 'Navigation' and contains a table of navigation items. The table has columns for 'Category', 'Identifier', 'Author', 'Created', 'Update', and 'Last edited by'. The 'Menu' and 'Structure' options are highlighted in the left sidebar. An orange arrow points from the 'Courses' menu item to the 'Navigation' page.

Category	Identifier	Author	Created	Update	Last edited by
Portal category	portal		01-Jul-20...		
Main navigation	learner		01-Jul-20...		
Footer	manager		01-Jul-20...		
Folder settings	manager_staff		01-Jul-20...		
User profile folder	manager_dashb...		01-Jul-20...		
Management	my_staff_folder		01-Jul-20...		
Courses	course_creation...	imc Super	15-Nov-20...		

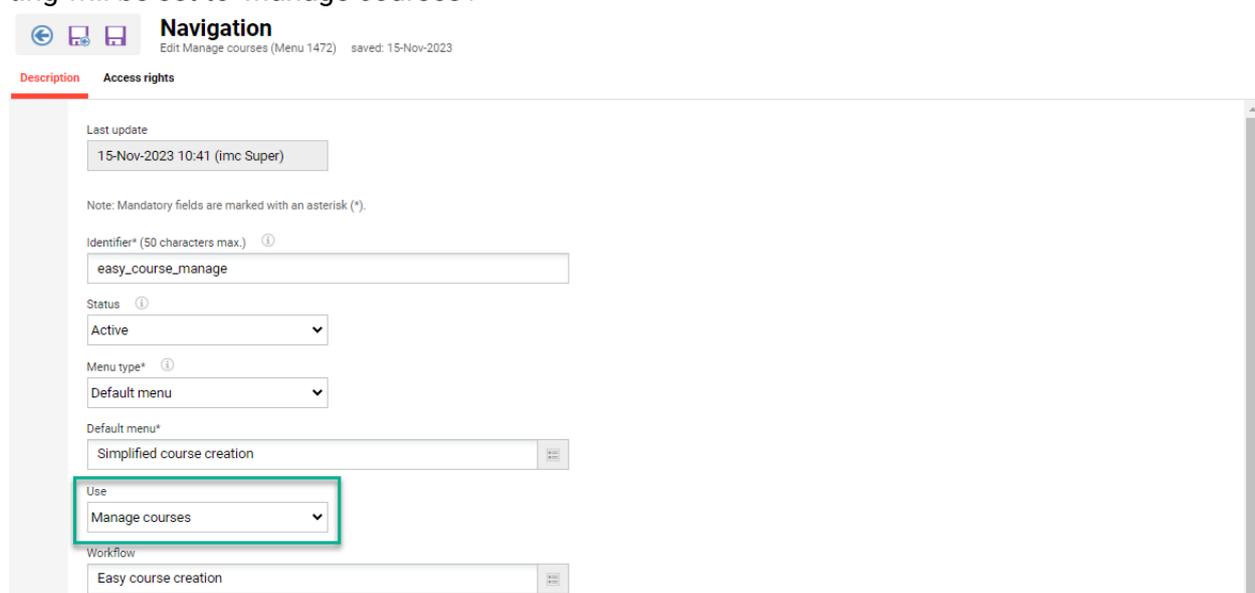
When creating a new menu complete the following steps:

1. The first field to populate is the 'Identifier' which will require a unique text value to be entered without spaces; it is recommended to name similar to the workflow.
2. The 'Status' will need to be Active for the menu to be usable.
3. The 'Menu type' will need to be set as 'Default menu' as Easy Course Creation is a standard function and this will then display a 'Default menu' selection field.
4. Click the 'Default menu' to launch a popup window that contains all standard functions. Search for 'Easy' or 'Simplified', select 'Simplified course creation' and click 'OK'.
5. The 'Use' option for easy course creation will be 'Created'.
6. Next choose the 'Workflow' to be used for the new navigation point.
7. Decide if the 'Destination' will be 'Same tab' or 'New tab'.
8. Enter a 'Name' for the new navigation point in each system language.
9. In the 'Access rights' tab add the manager groups that require access to the new menu.
10. Once population is complete click 'Save and back' to finalise.



The new navigation point will now be ready, but to view this will require logging out and then logging back into the system as navigation will not update live during a session.

Next repeat the above navigation point creation process to create a new 'Manage courses' navigation point. Outside of a different identifier and name, the only difference will be the 'Use' setting will be set to 'Manage courses'.



Note: In a default configuration this would require a 'System administrator' or 'Super administrator' role to perform navigation configurations.

Tutor navigation:

Note: In a default configuration this would require a System administrator or Super administrator role to perform navigation configurations.

Administrator navigation:

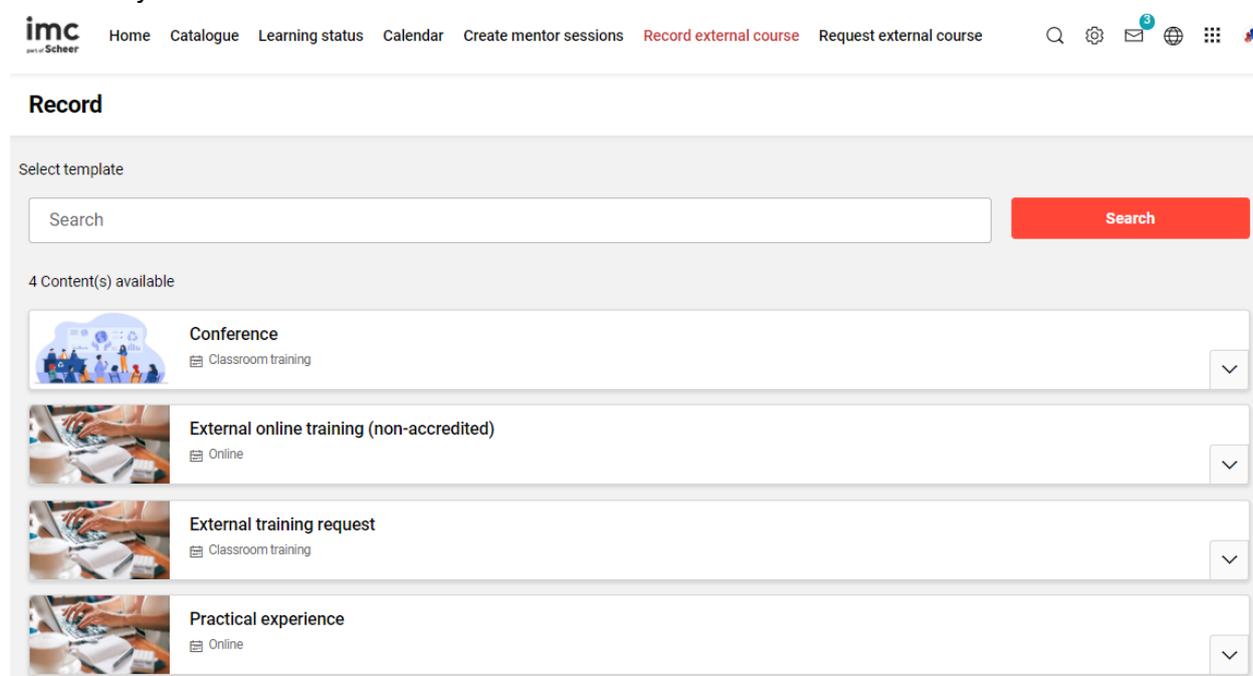
If Easy Course Creation is desired for administrators, then new navigation points can be configured in the 'Admin' category where required; likely 'Admin > Content > Courses'. To do this simply replicate the steps described in the 'Manager navigation' and update the identifiers to different values, as well as defining access rights for required administrator groups.

4 Easy Course Administration

This chapter will explain the key administrative steps involved in creating and managing courses via the easy course creation functions.

4.1 Recording and Requesting External Courses

Learners can record or request external courses via respective menus. The workflow linked to the navigation point will determine if population begins immediately in a pre-selected external course template, or if the learner will need to manually select an external course template for which they have clearance.



The screenshot displays the 'Record' section of the imc system. At the top, there is a navigation menu with the following items: Home, Catalogue, Learning status, Calendar, Create mentor sessions, Record external course (highlighted in red), and Request external course. To the right of the menu are icons for search, settings, notifications, and a globe. Below the navigation is a search bar labeled 'Select template' with a 'Search' button. Underneath, it indicates '4 Content(s) available'. The list of templates includes:

- Conference (Classroom training)
- External online training (non-accredited) (Online)
- External training request (Classroom training)
- Practical experience (Online)

A course template is selected simply by clicking anywhere on the list or tile object except the down arrow which expands. This will immediately load the 'Course details' step where the learner will populate details of the training activity they are recording or requesting. Like regular courses, the available meta tags and pre-defined values displayed when creating external courses are determined in the selected course template, but some additional meta tags can also be defined in the course creation workflow. Once meta tags are populated clicking the 'Save and close' button will save the external course and move to the next step of the process.

Request

1 2

Course details

Name *

Description
 B I U S | [Rich text editor icons]
 For a professional development activity I'd like to attend Learntec to learn more on latest learning trends with many exciting sessions by renowned keynote speakers.

Preview image


Start date *
 Start time

End date *
 End time

Further information
 Drag file here

Alternative Location
 B I U S | [Rich text editor icons]
 London, so I would require accommodation as well.

The next step of the process is largely determined by the course creation workflow linked to the navigation point, but also by the course type 'process complexity' settings from which the selected course template was derived. Normally for external courses the next step in the process would be 'Additional information' which can allow populating additional meta tags if added to the workflow.

Request

1 2 3

Additional information

Further possible steps in the process could include adding an internal Certification plus achieved hours/points the training relates to, adding an internal skill that the training awards, and adding externally awarded certificates as evidence. Once all available steps have been completed the final step displays the course overview which is a summary of entered information.

imc Home Catalogue Learning status Calendar Create mentor sessions Record external course Request external course

Request

2 3

Course overview

Course details



Learntec conference
03-Jun-2024 08:00 - 05-Jun-2024 17:00

Description
For a professional development activity I'd like to attend Learntec to learn more on latest learning trends with many exciting sessions by renowned keynote speakers.

Further information
Alternative Location
London, so I would require accommodation as well.

Upload course file 1
Upload course file 2
Upload course file 3
Upload course file 4
Price
560.00 EUR

Cancellation type
Self-cancellation

Cancellation by learning logic
Yes

Additional information

Close

If the selected course template defined an approval process in the 'Enrolment type' meta tag the external course would not immediately be assigned to the learner's 'Completed' courses in the 'Learning status' function, but actually have a 'Pending' status until approved or rejected by the supervisor or administrator.

imc Home Catalogue Learning status Calendar Create mentor sessions Record external course Request external course

Learning status

Current **Pending enrolments** Recommended Completed Cancelled All Wunschliste

Search term Search Filter

4 Results

- 

Helping colleagues
Requested on 19 Mar 2024 10:30
Unlimited English (GB) Requested Online
- 

Identifier Pattern Test Seq 1
Expired on 20 Dec 2023 18:00
Unlimited Free of charge Reserved Classroom training
- 

Learntec conference
3 Jun 2024 08:00 to 5 Jun 2024 17:00
Unlimited English (GB) Requested Classroom training
- 

LMS training
Requested on 19 Mar 2024 10:43
Unlimited English (GB) Requested Online

4.2 External course approvals

External course requests and recorded external courses that require approval must be viewed via a 'Booking request' panel that is configured to display external courses. For supervisors this is like contained within the Manager dashboard and for administrators this would likely be an own approval dashboard in the 'Admin' category. For external course approval panels, the pending approvals would normally be sorted by 'User' which makes more sense than by course given external courses are one to one ratio. The drop-down arrow on a user when clicked will expand to show pending approvals for the user. Approvals are performed by clicking the tick symbol and rejections by clicking the cross symbol.

Booking requests
Here you will find the tasks that require your attention.

List focus: Courses | **User** | Search: Username or ID | Filter

imc Super

imc Admin

External course requests awaiting approval from the superior

Course	Type	Price	Start date	End date	Location	Available places	Status
Learntec confe...	Classroom trai...		3 Jun 2024 08:...	5 Jun 2024 17:...		Unlimited	Confirmation p... <input checked="" type="checkbox"/> <input type="checkbox"/>
Skillfest	Classroom trai...		15 Jul 2024 08:...	15 Jul 2024 17:...		Unlimited	Confirmation p... <input checked="" type="checkbox"/> <input type="checkbox"/>

Clicking anywhere else on the request record will open the course details to provide a full description, along with any uploaded content such as additional information or certificates that complement the request. Once details are viewed either clicking '← Dashboard' or the browser 'Back' button to return to the previous screen where the Approval/Rejection can be processed.

imc part of Scheer Staff member Management dashboard Courses

← Dashboard imc Admin

Learntec conference

Classroom training Requested 3 Jun 2024 08:00 to 5 Jun 2024 17:00

Description Employee's syllabus

<p>Planning status Released</p> <p>Alternative Location London, will also require accommodation</p> <p>Start date 3 Jun 2024 08:00</p> <p>End date 5 Jun 2024 17:00</p> <p>Pre-start accessibility from the start of the course</p> <p>Post-conclusion accessibility unlimited</p> <p>Enrolment type External Course: confirmation by supervisor</p> <p>Maximum capacity unlimited</p> <p>Cancellation type Self-cancellation</p> <p>Identification code _000068_0002</p>	<p>My learning status</p> <p>Status Employee has applied for this course, but the confirmation is pending</p> <p>Start date 3 Jun 2024 08:00</p> <p>End date 5 Jun 2024 17:00</p> <p>Share this course</p> <p> </p>
---	--

4.3 Easy Course Creation (Manager / Admin)

Managers and Administrators can create courses via course creation menus. The workflow linked to the navigation point will determine if population begins immediately in a pre-selected course template, or if a course template will need to manually be selected for which they have clearance.

The screenshot displays the user interface for selecting a course template. At the top, the user is identified as a 'Staff member' and is in the 'Management dashboard' under the 'Courses' menu. A search bar and a 'Search' button are present. Below the search bar, it indicates '9 Content(s) available'. A list of course templates is shown, each with a title, a learning mode icon, and a description. The templates listed are:

- Datenschutz III** (Online)
- Finance training** (Blended learning) - Description: Update, Places available: unlimited
- makr Test Zusätzlicher Buchungs-Button** (Hybrid)
- Management** (Classroom training)
- Mentoring** (Classroom training)

A course template is selected by simply clicking anywhere on the list or tile except the down arrow which expands to show further details. This will immediately load the 'Course details' step to populate details of the course being created. Like regular courses, the available meta tags and pre-defined values displayed when creating external courses are determined in the selected course template, but some additional meta tags can also be defined in the course creation workflow. Once meta tags are populated clicking the 'Save and close' button will save the course and move to the next step of the process.

imc Staff member Management dashboard Courses

Select template for your course

1 2

Course details

Name *

Description

Start date *
 Start time

End date *
 End time

Keywords

Subtitle

Planning status *

Administrator

Preview image

The 'Addition information' step can enable uploading further information or populating further meta tags defined in the linked course creation workflow. Clicking 'Save and continue' proceeds to the next step.

imc Staff member Management dashboard Courses

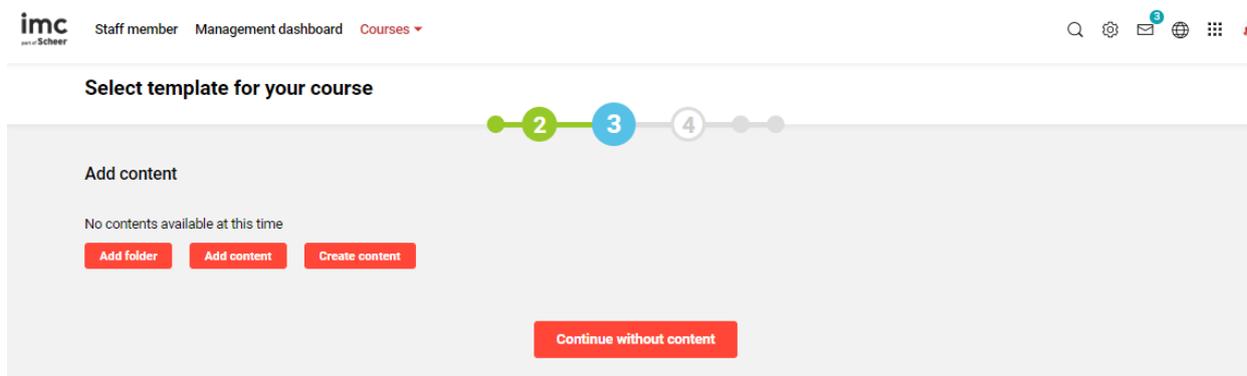
Select template for your course

1 2 3

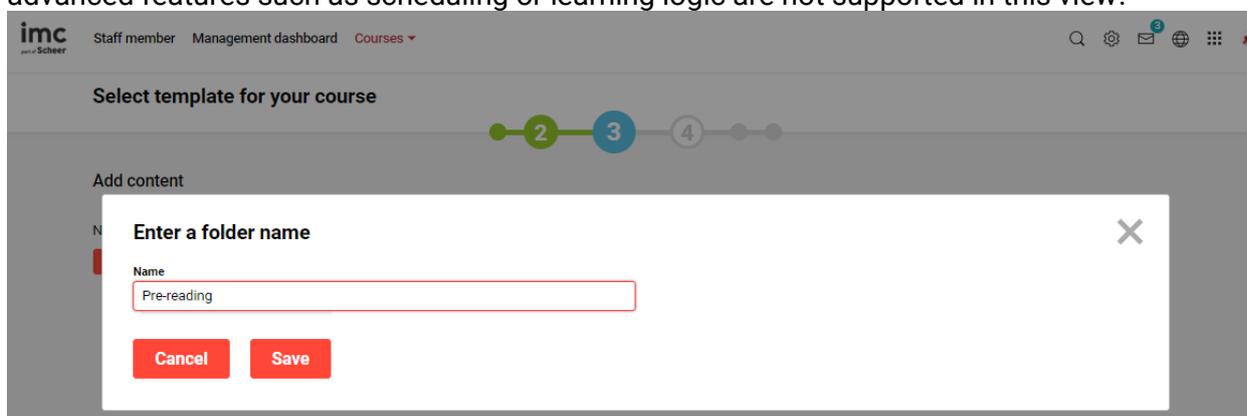
Additional information

Further information

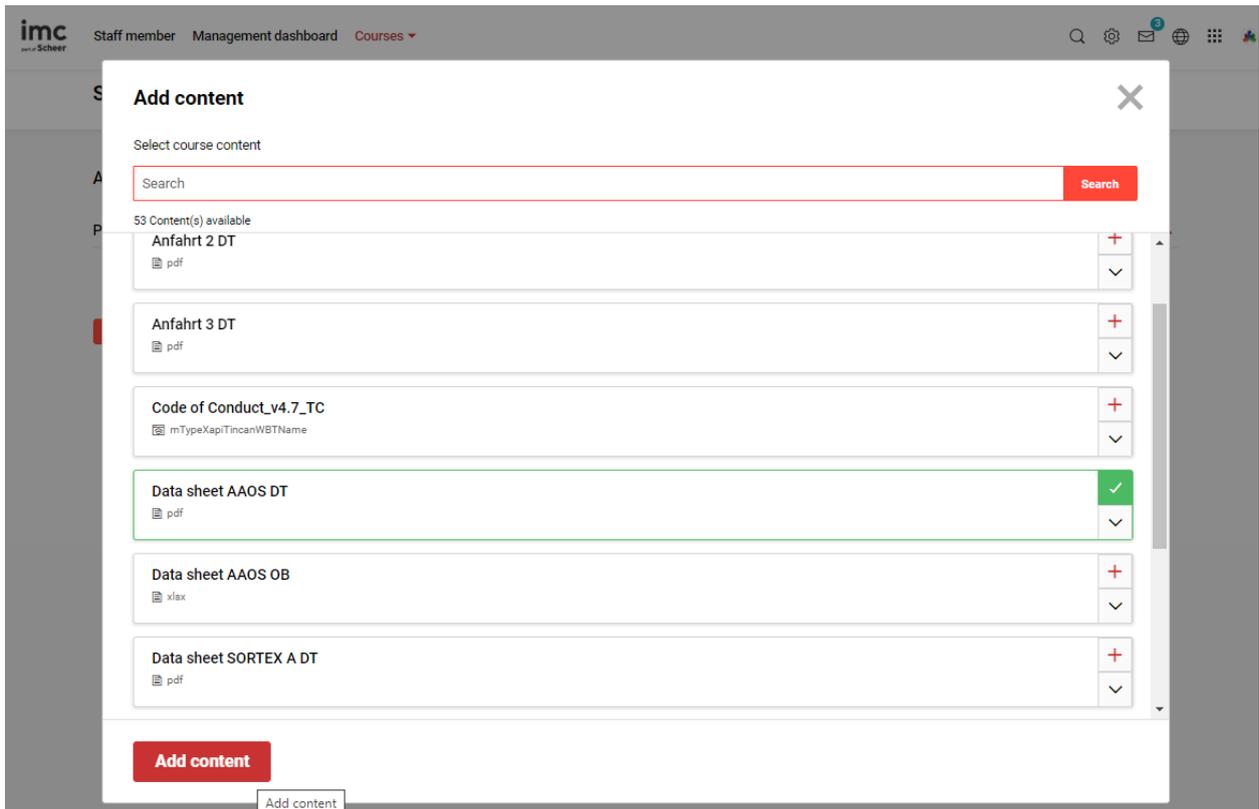
The 'Add content' step enables the manager or administrator to alter the syllabus of the course by creating folder structures, adding additional existing components they have clearance to from the media library, and also creating/uploading select new media components.



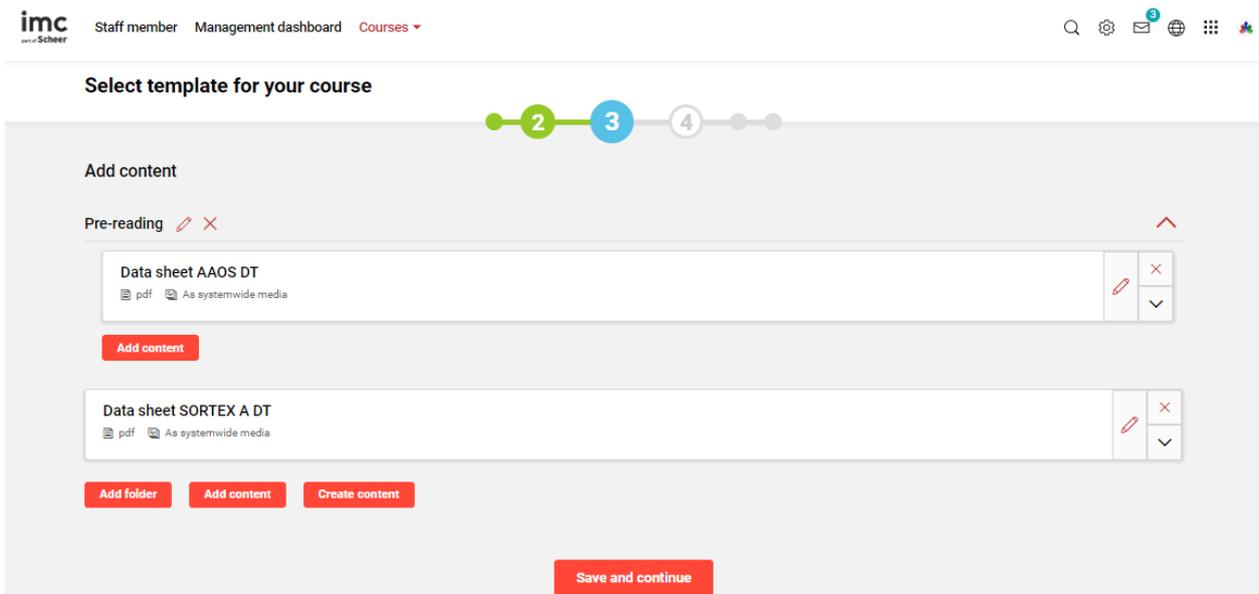
The 'Add folder' option creates sub-folders either from the main syllabus folder, but does not allow the creation of sub-folders from sub-folders as the standard course function allows. With the easy course creator, it's only possible to create the folders for structural purposes and other advanced features such as scheduling or learning logic are not supported in this view.



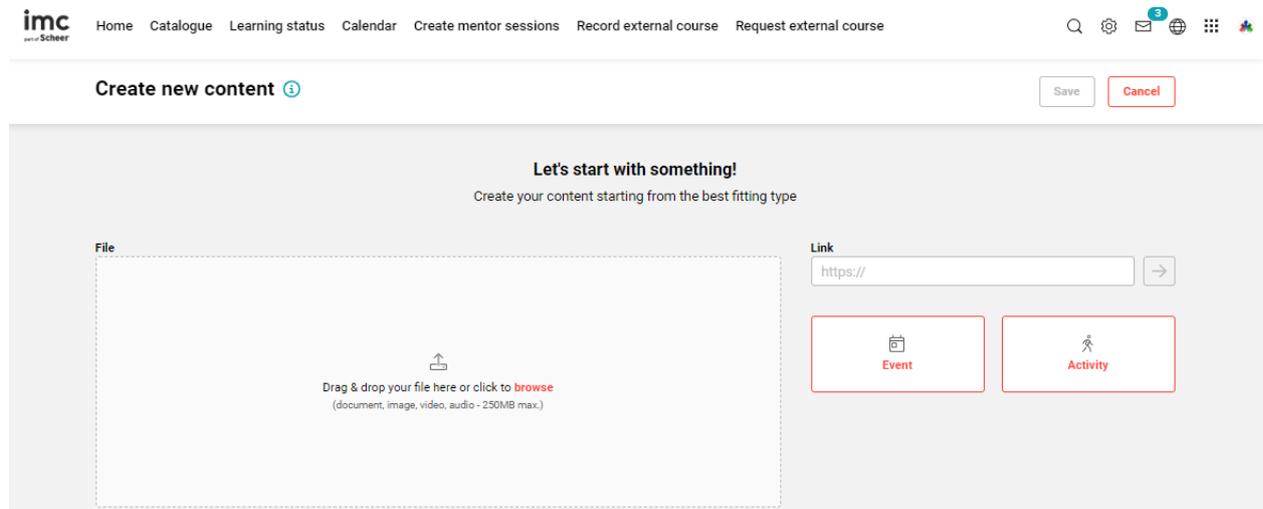
The 'Add content' button enables adding existing media items to the main folder or sub-folders. The displayed media is returned based on clearances. Click the '+' icon on the content to show a tick symbol and then click the 'Add' button to finalise.



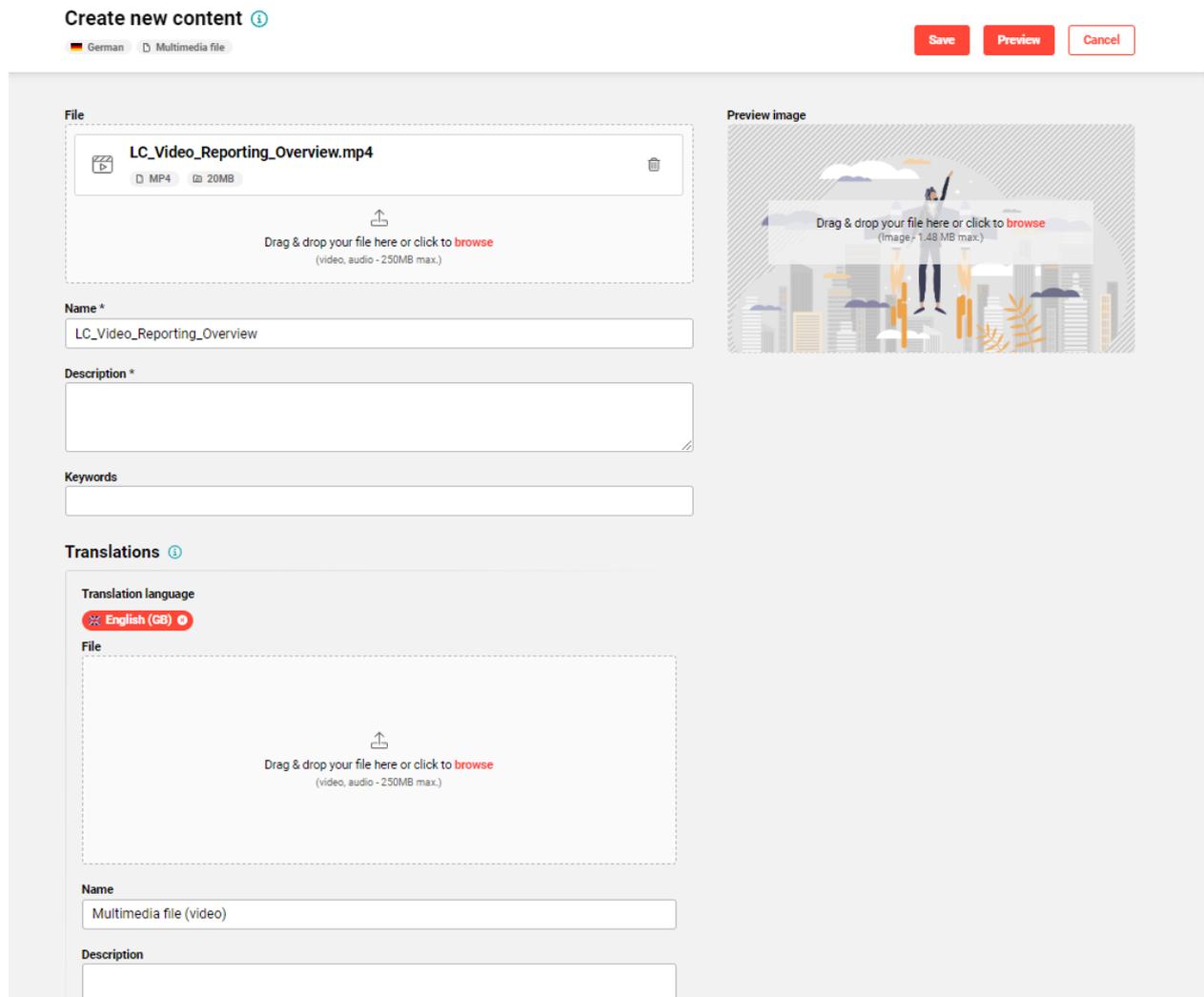
The added content will display as below where the parent folder is not visible, but it is definitely there. As there are not Up/Down arrows or Cut/Paste options drag & drop is used to move the content and folders to desired locations.



If 'Create content' is clicked, then a new screen will load with a main file area to either browse for or drag files into. When uploading here there is no need to pick the media type as it's automatically determined based on file extension types. Other options are creating Links, Events and Activities.



When describing new content, the default language will match that of the media type linked to the media format defined in 'Clients > Settings > Easy media upload'. Populations in other content languages enabled in the media type is also possible in the 'Translations' section. As with creating media directly in the 'Courses' function an option will be provided to save as either course specific or system wide.



The 'Add participants' step enables participants to be added to the course by either clicking 'Add groups' or 'Add participant(s)'. With groups only active target groups for which the user

clearance can be added and all included users will be added as participants with removal possible. The 'Add participant(s)' button will provide a list of all active users for which the logged in user has clearance to and searching is possible by first and last name.

For instructor-led courses the 'Insert tutors' step will allow adding tutors by clicking the 'Add tutors' button. This will enable searching for users assigned to groups with the 'Tutor' function enabled. It will be possible to add multiple tutors and the default tutor role defined in 'Configuration > Tutoring' will be applied as there is no role selection possibility or various checkbox options as with traditional course creation.

Once all details are populated, content is added, participants enrolled, and tutors assigned, a course overview will be displayed and the course creation can be closed as all details are saved at each step along the way.

imc Staff member Management dashboard Courses

Select template for your course

Course overview

Course details

Finance monthly update June 2024
05-Jun-2024 10:00 - 05-Jun-2024 12:00

Description

Regular monthly update to cover:

- Latest figures
- Projections
- Team update
- Process changes
- Software tip of the month

Keywords

Subtitle

Please attend

Planning status

Released

Administrator

No Administrator has been selected yet

4.4 Easy Course Management

All courses created with 'Usable for course creation workflow' enabled can be managed in the 'Course management' navigation described earlier in chapter 3.2.3. The logged in user will be able to view courses where they have 'Execute' clearance and only be able edit those where they have 'Edit' clearance. Clicking 'Edit' will reopen the same view as the creation workflow with the same steps enabled. By default, users who create a course will have full 'Unrestricted' clearance and will see all options including 'Edit', 'Attendance tracking' and 'Report'.

imc Staff member Management dashboard Courses

Select template for your course

Search

60 Content(s) available

Sorted by: Last update

Finance monthly update June 2024
05-Jun-2024 10:00 - 05-Jun-2024 12:00

Edit Attendance tracking Report

Description

Regular monthly update to cover:

- Latest figures
- Projections
- Team update
- Process changes
- Software tip of the month

Hours

2

Finance department training May 2024
30-May-2024 10:00 - 30-May-2024 12:00

4.4.1 Easy Course Attendance Tracking

The 'Attendance tracking' is actually separate, yet complimentary, function to easy course creation that can be directly launched via the easy course creation 'Create' and 'Manage courses' use menus. This is also a mobile friendly and responsive interface to simplify marking of participant component progress or course completion statuses by simply clicking on cells.

The screenshot shows the 'Attendance tracking' interface for the course 'Finance monthly update June 2024'. At the top, there are 'Save changes' and 'Cancel' buttons. Below is a table with columns for 'Course status', 'Data sheet: AAGS DT', and 'Data sheet: SORTEX A DT'. The table lists four participants with their respective statuses: Enrolled, In progress, Enrolled, and In progress.

Participant	Course status	Data sheet: AAGS DT	Data sheet: SORTEX A DT
Oliver Brückner (111683)	Enrolled	○	○
Bühler HQ (112660)	In progress	●	●
Maria Schulz (110837)	Enrolled	○	○
Marlen SORTEX A Test (121048)	In progress	●	●

4.4.2 Easy Course Reporting

The 'Report' option provides a basic overview of the percentage of participants that are complete (Compliant) or still in progress (Pending). Clicking on the respective bar chart status changes the list of participants to show only those with the selected status. Each participant can be clicked on to see an overview of all courses for which they have an enrolment status.

The screenshot shows the 'Easy Course Reporting' interface for the course 'Finance monthly update June 2024 (125532)'. It features a bar chart with a green segment (Compliant) and an orange segment (Pending). Below the chart are buttons for 'Compliant (1)' and 'Pending (3)'. A search bar is present, and a list of participants is shown below, including Brückner Oliver, HQ Bühler, Schulz Maria, and SORTEX A Test Marlen.

Comprehensive report
 Finance monthly update June 2024 (125532)

Compliant (1) Pending (3)

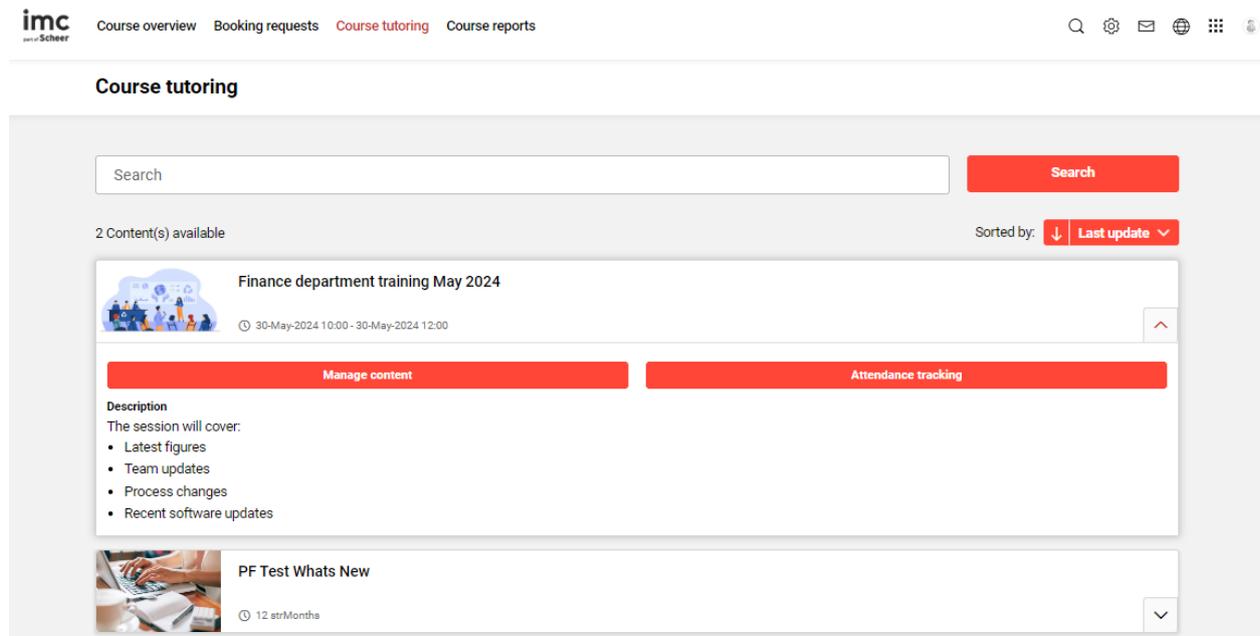
Search [] Search

All users (4)

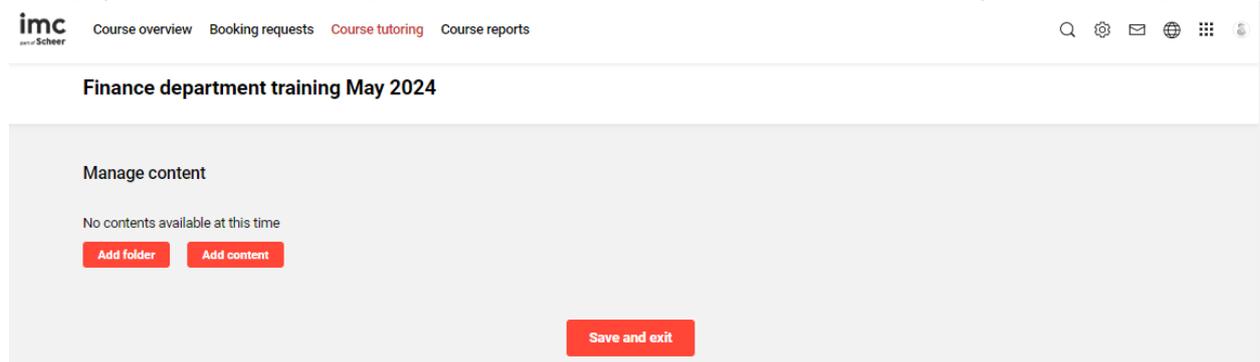
- Brückner Oliver (111683)
- HQ Bühler (112660)
- Schulz Maria (110837)
- SORTEX A Test Marlen (121048)

4.5 Course tutoring

The 'Course tutoring' function displays a list of all courses for which the logged in user is assigned as a tutor. The tutor, depending on access rights of their assigned tutor role, will be able to 'Manage content' to update the syllabus and/or view the 'Attendance tracking' to mark participant progress.



The 'Manage content' function essentially works the same way as the course creation workflow and is possible for tutor roles with the 'Syllabus' option enabled; the tutor role accesses are defined in 'Configuration > Tutoring'. Tutors will be able to personalise their courses by editing existing syllabus items, adding folders and further content to the courses they are delivering.



The 'Attendance tracking' function can also be directly accessed via the 'Course tutoring' function in addition to the standard 'Course overview > Course instruction' option. The functionality does not change between the two options and purely serves as an alternative access point.

- Course overview
- Booking requests
- Course tutoring
- Course reports

🔍 ⚙️ ✉️ 🌐 ☰ 👤

Finance department training May 2024

🕒 30 May 2024, 10:00 to 30 May 2024, 12:00

Save changes
Cancel

↓
2 Participants

			🎓 Course status
<div style="display: flex; align-items: center; gap: 5px;"> <div> <p>Marlen AAOS Test</p> <p><small>🆔 121047 🗄️ maaostest</small></p> </div> </div>	✔️	✎	Passed
<div style="display: flex; align-items: center; gap: 5px;"> <div> <p>Frank Mulan</p> <p><small>🆔 110838 🗄️ imc_frank</small></p> </div> </div>	✔️	✎	Passed

Summary

This is now the end of the document. Hopefully the overview information, configuration steps and administration hints have provided enough detail to enable successful setup and usage of the Easy Course Creation functions for external course usage or simplified course creation. If further support is required 2nd level support requests can be made via the imc Service Desk.