

# LMS Configura- tion

Service Description

**imc Learning Suite**

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# Preface

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This document describes the **LMS configuration** services provided by the imc project team as part of an implementation project for the Learning Management System (LMS) imc Learning Suite. The LMS has an initial configuration / initial database, which already contains the basic roles and necessary settings for basic processes. Within the framework of an implementation project, the aim of the project team is to adapt the configuration of the LMS to the requirements of the customer. The scope of the project must also be considered, as (i) the LMS consists of basic modules and basic functions as well as additional functions and add-on modules (**scope of the configuration**) and (ii) there are different configuration levels that define the scope of the individual configuration areas (**complexity of the configuration**).

The configuration of the LMS includes (a) the listing of the areas that are configured as basic modules and basic functions within the framework of each implementation project, as well as the listing of the optional functions and add-on modules that are only part of the scope of the configuration in the case of an explicit project order, and (b) the definition of the different configuration levels with regard to the complexity of the configuration.

For this reason, the service description includes the work packages under consideration of the following aspects:

- **Description of the services to be provided** by the imc project team within the scope of the implementation project. The document also describes additional options that may be provided as additional services within the scope of the implementation project.
- **Description of the competences and responsibilities**, which are partly on the part of imc and partly on the part of the customer.
- **Description of the procedure, the process and time dependencies** for the configuration of the LMS, so that a transparent view of the individual steps is possible for all participants.

## Scope of the Configuration

This section describes which basic functions and basic modules (which also do not require separate licensing in the system), are configured by the imc project team within the scope of an implementation project, as well as which additional functions and add-on modules are not part of the project scope, unless there is an explicit order.

All basic functions and basic modules that are configured within the scope of the implementation project based on the customer's requirements are also addressed in the basic admin training, although not every topic can be covered in full depth. The following table lists the basic functions and basic modules - divided into areas.

Areas	Description
Access Management	<ul style="list-style-type: none"> <li>- Setup of the <b>dashboard pages</b> before and after login in combination with the configuration of the URL (technical setup). The existing system panels (including <b>news</b>) are used, and customer-specific images and texts are stored so that the customer can take over the maintenance of this content alone. This also includes portal pages in the footer if desired by the customer. Authentication procedures such as SAML2 or OIDC are separate modules.</li> <li>- If the customer scenario provides for <b>self-registration</b> of (mostly) external users, this is also part of the scope. Automated or manual user imports (CSV / SCIM) are separate services that must be listed in the project order.</li> <li>- The configuration of the <b>privacy policy</b> and <b>password policies</b> (when using local authentication) as well as general settings for <b>security</b> require the customer's input.</li> <li>- Provided that the LMS is operated in the CLOUD and a local login is used, the use of the imc <b>Learning Apps</b> (Android, iOS - standard apps) is possible.</li> </ul>
System Management	<ul style="list-style-type: none"> <li>- While <b>adapting the wording</b>, the imc project team does not conduct any system-wide replacements of terms. Only changes to individual texts at the customer's request are conducted by imc. In principle, the aim is for the customer to be able to make minor changes independently. To this end, the imc project team will guide the customer. Wording changes or naming of objects including navigation will be conducted by imc in the two basic languages German and English.</li> <li>- The <b>implementation of the design</b> is part of the technical setup. In addition, the project team will coordinate and configure the available platform and execution languages as well as implement the system behaviour and the display of language specifications.</li> </ul>

<b>Organisation Management</b>	<ul style="list-style-type: none"> <li>- Configuration of the necessary <b>clients</b> with corresponding differentiation of the client settings as well as setting up the necessary <b>organisers</b> for the learning offer.</li> <li>- Configuration of the <b>group and role structure</b> starting from the basic structure of learner, manager, tutor, administrator, and system administrator. An automatic or manual import of groups (via CSV or XML) requires a separate project order. <b>Automatic assignments to groups</b> (if possible) must also be implemented or be part of automatic user imports.</li> <li>- Configuration of <b>group- or role-specific navigation</b> is also part of the implementation project.</li> <li>- The creation of customer-specific <b>target groups</b> (based on rules), which are updated nightly and can be used to map approvals or assignments, is the responsibility of the customer, with the project team providing technical support.</li> <li>- Defining the <b>general access rights</b> (Access Control List / ACL) based on the roles and rights concept.</li> </ul>
<b>User Management</b>	<ul style="list-style-type: none"> <li>- The creation of customer-specific <b>user attributes</b> as well as the adaptation of existing <b>user lists</b> and <b>profile pages</b> is also conducted within the framework of the implementation project, whereby this is based on the input of the customer.</li> <li>- <b>Automated or manual user imports</b> (CSV / SCIM) are separate services that must be listed in the project order. However, during the implementation, <b>registration rules</b> are defined that (a) perform value assignments, (b) perform assignments to groups and clients, and (c) set access right on user objects.</li> </ul>
<b>Content Management</b>	<ul style="list-style-type: none"> <li>- The setup of the existing <b>media types</b> is limited to the licensed areas of the LMS, i.e., additional modules / add-ons such as interfaces to third-party systems must be considered separately. Also excluded - unless otherwise commissioned - is the set-up and training of On-The-Job Trainings (OJT).</li> <li>- In the area of <b>tests / test series</b> as well as <b>feedbacks</b>, the system standard will be used. It should be noted that the use of effectiveness checks is an additional module that requires licensing.</li> <li>- Within the scope of the implementation project, imc supports the use of <b>certificates</b> (e.g., courses), whereby the creation of the certificates is the responsibility of the customer.</li> <li>- The use of <b>export templates</b> is the responsibility of the customer and is not dealt with as part of the implementation project.</li> </ul>

<b>Learning Management</b>	<ul style="list-style-type: none"> <li>- The implementation project involves setting up the relevant <b>course types</b> based on the system's own types. It is advisable to use a separate course type for each <b>learning form</b> (scenario). A separate <b>course room type</b> should also be used for each course type.</li> <li>- Unless otherwise ordered, setting up scenarios with external courses (<b>recording and approving external courses</b>) is not dealt with in the implementation project. Also excluded - unless otherwise instructed - is the set-up of scenarios for <b>seat allocation</b>.</li> <li>- The definition of available <b>tutor roles</b> is discussed and implemented together with the customer.</li> <li>- Part of the implementation project is also the setup of a content-based <b>learning path type</b> based on the system's own types. The handling of further scenarios (especially level-based learning paths) requires a separate assignment.</li> <li>- The imc project team provides support in the use of <b>locations</b> for courses and learning paths, whereby the actual creation of locations to populate the system is the responsibility of the customer.</li> <li>- <b>Catalogues</b> for mapping self-booking processes are created in the implementation phase based on customer requirements and integrated into the navigation with the appropriate approvals.</li> <li>- The project team assists in the creation of <b>classifications</b>, whereby the customer does the creation of the actual classifications.</li> <li>- The LMS configuration includes the set-up of a maximum 2-stage <b>escalation model</b> (two reminder emails) with the corresponding escalation messages. Adaptations to the texts can be implemented by the customer himself - with the support of the project team. More complex scenarios including re-certifications are not part of the scope of an implementation project.</li> </ul>
<b>Booking Management</b>	<ul style="list-style-type: none"> <li>- The <b>notifications</b> offered by the LMS are discussed in the implementation project and activated according to the customer's requirements. Adaptations to the texts can be implemented by the customer himself - with the support of the project team.</li> <li>- As part of the implementation project, the project team provides support in the technical set-up of <b>enrolment forms</b> and the relevant <b>enrolment data</b>, whereby the actual creation of the forms / data is the responsibility of the customer.</li> <li>- Unless otherwise defined, the implementation project does not include any changes to the LMS's own <b>enrolment processes / enrolment mails</b>. The project team assists with the activation of required /</li> </ul>

	<p>deactivation of non-required enrolment processes as well as with the activation / deactivation of enrolment transitions and their booking mail texts.</p> <ul style="list-style-type: none"> <li>- The adaptation of the existing <b>cancellation, exception and approval reasons</b> is planned in the implementation project, whereby the customer must provide input here and this depends on the requested scenario.</li> </ul>
<b>Report Management</b>	<ul style="list-style-type: none"> <li>- The LMS configuration includes <b>role-specific reporting</b> and thus the activation of relevant standard reports for the agreed groups / roles in the system. The customer is also enabled to update reports in user lists and metatag lists independently.</li> <li>- The customisation of <b>report categories</b> as well as the project team will address the set-up of an exemplary report subscription (if required).</li> <li>- <b>Index-based reports</b> will only be set up if the customer has ordered them accordingly.</li> </ul>

In the following, additional functions and add-on modules are listed that are not dealt with, not configured, and not trained during the implementation project, unless they are explicitly listed in the project order.

**Note:** Some of these add-on functions do not require their own licensing and can therefore be used independently by the customer. If add-on modules are already included in the customer's licensing scope - but without accompanying services - the consulting services (requirements analysis, configuration, training) can be added at a later stage, but are not included in the actual project scope.

- Resource Management
- Skill & Competency Management
- Gamification
- On-the-job training
- Custom App
- Report Designer
- Certification Management
- Effectiveness Control
- Task Management
- Channels
- LTI 1.3
- Learning Analytics
- Shopify Connector
- Paypal Connector
- Avetmiss Connector
- Virtual Classroom Connector
- LinkedIn Learning Connector

- Microsoft Teams Connector
- Examity Connector

**Note on the use of the REST API:** The implementation project does not include professional or technical support for the use of the REST API of the LMS. This can be done via a separate order during the implementation or at a later point in time.

## Complexity of the Configuration

To better address the actual needs of our clients, an LMS implementation project also considers the complexity of the LMS configuration.

Unless otherwise agreed in the project order, the configuration of the LMS considers the scope described in the previous section. However, there are limits and restrictions in terms of the number of mapped scenarios and complexity in a **standard project**:

- No new course types are introduced that are not already provided for in the product standard and the number of catalogues is limited to two.
- The number of clients (up to two clients) and the number of roles/groups is based on the roles already provided in the product standard (learner, supervisor, tutor, admin). However, the authorisation concept is agreed in detail with the customer and exemplary objects (e.g., booking forms, locations) are already created together with the customer.
- The creation of up to twenty customer-specific user attributes and the coordination of user lists / profile pages is planned.

The aim of the implementation project is to enable the customer to make certain configurations without imc, including changing system texts, booking mail texts / notification texts, changing the navigation, creating certificates, and customising profile pages / and user lists.

In addition to the assumed complexity of a standard project, there is also the option to reduce the complexity of the LMS configuration, which then also affects the scope of the implementation project. The two options / configuration levels **Out-of-the-box** and **Starter** offer a reduced level of complexity, i.e., there is either no coordination at all or limited coordination.

### Configuration Level Out-of-the box

- For customer scenarios that are based directly on the system standard (vanilla / blueprint), the implementation project only includes the coordination of a course type for mapping the online scenario, including a catalogue and a start page. **All other configuration topics are not covered by the project.**
- Beyond that, **no further coordination / adjustment of the configuration of the LMS takes place with the project team** - except for agreed interfaces and technical setup including design implementation.
- This configuration level offers the customer the possibility to update the configuration independently after the implementation project has been completed.
- As an additional service, imc can offer coaching packages to support the customer in configuring the system. The coaching packages then offer the customer the opportunity to make use of consulting services on demand (time & material).

### Configuration Level Starter

- This configuration level is suitable for customers who decide to start with a limited scenario. For this, a maximum of two clients and a maximum of two organisers (providers) are

coordinated and set up. The role and group concept are based on the standard roles (learner, supervisor, tutor, admin) with a coordinated authorisation concept.

- Overall, this configuration level is limited to up to two scenarios with two course types and up to two catalogues with coordinated search criteria. The setting up of learning path types is not provided for. User properties are limited to up to ten additional user attributes.
- All other configuration topics (e.g., dashboard page configuration or guidance how to change system texts) of a standard project are also addressed in the Starter implementation level.

In addition to the two options / configuration levels **Out-of-the-box** and **Starter**, which offer a reduced complexity, more complex scenarios that go beyond the described complexity of a standard project are also possible. The configuration level **Individual** offers the possibility to consider an individual complexity. Based on the known requirements, the imc sales department will consider the complexity and incorporate the additional aspects into the project order. Of course, the complexity can also be adjusted at any time during an implementation project and additional aspects can be added by additional order. However, it must be checked individually whether the change in complexity, as well as changes in scope, can have an impact on the project duration.