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Automatic enrolment and recertification

imc Learning Suite

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1 Summary

This document describes the process of Automatic enrolment and recertification in the imc Learning Suite. In addition to the configuration for the standard scenarios, the individual configuration parameters are described in detail and examples for the different settings are given.

2 Details

2.1 Basic scenarios and setups

2.1.1 Automatic enrolment

Automatic enrolment works with courses, course templates and learning paths. It allows to automatic the enrolment of participants to a courses, course templates and learning path by using the target group functionality. It supports among others the following scenarios:

- Enrol a learner to a courses, course template or learning path as soon as
  - he is registered at the the system,
  - another course is completed,
  - a specific skill is reached.

In general every condition based on attributes, course status or skills can be chosen which is supported by target groups.

2.1.2 Recertification

Recertification is an extension of automatic enrolment and only works for course templates supports the following scenario:

- A participant must regularly refresh a qualification acquired in the past after a certain time or by a certain date in the year.
- Which participants undergo recertification can be determined by rules in target groups.
- The period between recertifications can be freely determined.
- The compulsory course to be repeated may consist of the same or new learning content.
- If the course is completed, a competence or certificate can be assigned to it.

This is mapped in the imc Learning Suite in a simplified way as follows:

- Creation of a target group that uses rules to define the participants who are to take part in the recertification.
- Creation of a course template that is the basis for recertification.
- Creation of a first course based on the course template.
- Creation of an automatic booking in the course template for the created target group.
- Execution of the automatic booking, either manually or through the nightly, automated execution.
- Create or duplicate another course using the course template to which participants are booked based on the recertification settings.

2.1.3 Simplified setup

1. Create a Target Group.
2. Create a template.
3. Add Target group.
4. Add content to template.
5. Create a course based on the template (for the next re certification, duplicate the course).

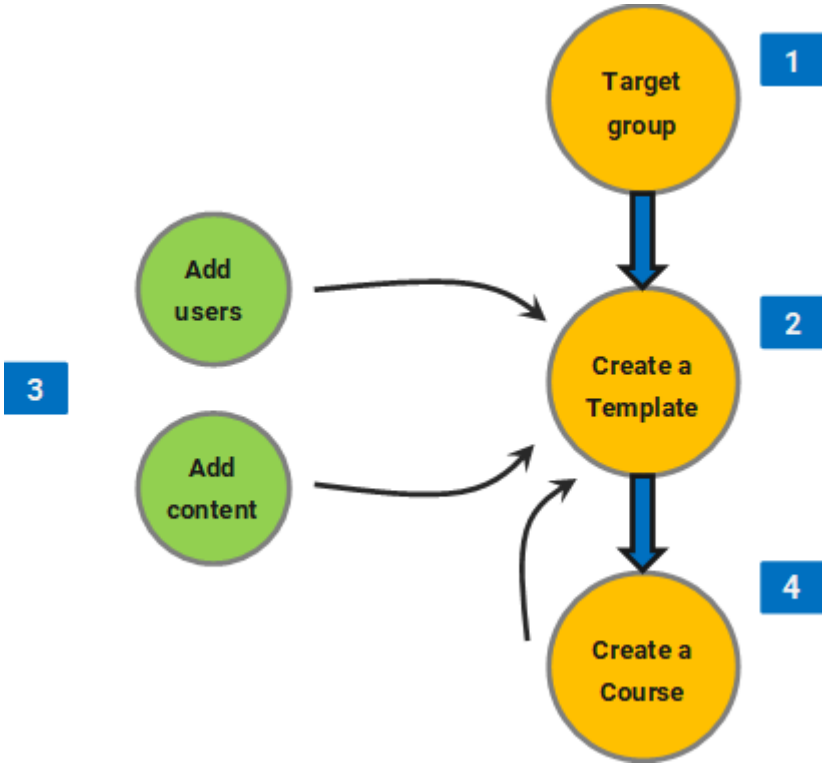

Fig. 2.1: Simplified setup: workflow.

2.2 Automatic booking settings

An important step is to set up automatic booking. The following figure shows the set-up dialogue for an automatic booking on a course template. The set-up consists of various parameters, including those important for recertification.

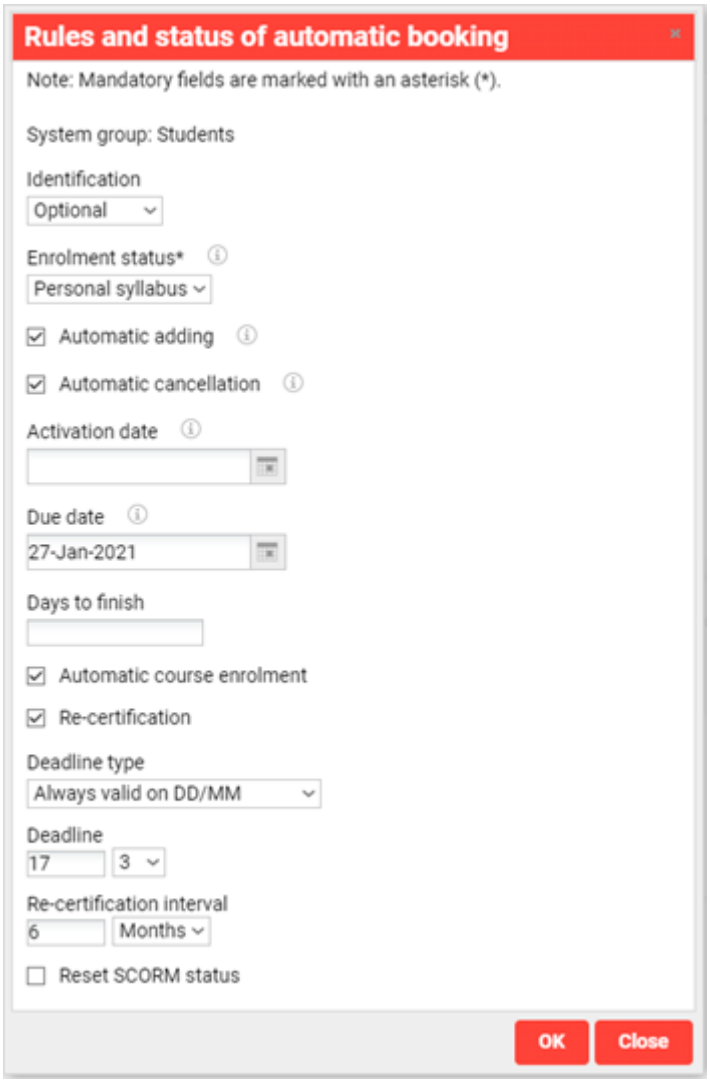

Fig. 2.2: Set-up dialogue for an automatic booking on a course template.

The settings visible in the screenshot are explained in detail in the following table.

Table 2.1: Settings for automatic booking

#	Parameter	Description
1	Labelling	Automatic booking flag (e.g. Mandatory, Optional) linked to the learner's display control. Different labels can be used for display in appropriately configured panels.
2	Enrolment status	Control of the learning level that the participant receives during automatic booking (learning target or preregistered).
3	Automatic adding	If activated, the current members of the deposited group are booked to the course/course template during operation according to the defined set of rules. If the setting is not activated, no initial booking of members who are in the group at the time of booking is carried out.
4	Automatic cancellation	When activated, the user is cancelled as soon as he is no longer a member of the deposited target group or when the group has been removed from the automatic booking.
5	Activation date	Sets the earliest date from which the automatic booking becomes active. If no date is set, this booking will be taken into account directly during the next run of the automatic booking job.
6	Due date	Defines the date from which the members of the group must have completed the course at the latest. If days to finish are also defined, the earlier date applies. **The due date only applies to the initial booking.** This means that in the case of recertification, this date is only taken into account if a user has not yet completed a course.
7	Days to finish	Determines the number of days a user has to finish a course. This automatically defines the due date. If the due date is also defined, the earlier date applies. In the case of recertification with a deadline, this value defines when a user is booked onto the course, i.e. deadline minus days to finish defines the booking date. If no value is entered, the default value stored in the system configuration (`businessprocess.xml`) applies, usually 30 days.

#	Parameter	Description
8	Automatic course enrolment	If this is activated, users who are stored on the course template are automatically booked into the next available and bookable (planning status "released" and course end date in the editing period) course.
9	Recertification	This activates recertification and triggers the calculation of a new next due date and possible booking for users who have successfully completed the course.
10	Deadline type	Here you can set whether the course is either "Due on a fixed date" or whether the date is calculated depending on the individual course completion of the participant.
11	Deadline	Day and month for the due date. Used in conjunction with the recertification interval to calculate the year of the next due date. **Mandatory field** if "Due on a certain date" is selected as the deadline type.
12	Recertification interval	For example, every 12 months or every 90 days. **Mandatory field** if recertification is ticked.
13	Reset SCORM status	If this is activated, the SCORM status of the content stored in the courses is reset for all participants when they automatically book a course. If this is not activated, the SCORM status is not reset. This means that a participant who has already worked with the learning medium can continue to work with this learning status after opening the course. In individual cases, this can mean that course parts are already marked as worked on / completed.

In addition to the above-mentioned parameters, there is a basic configuration for so-called buffer days, which are also stored in the businessprocess.xml. The default value is **7**.
Buffer days are used to bring forward the automatic booking in case of tight time windows for course processing by the learner or to move the due date back in time if the processing period is too short (see also chapter 3.2 Calculation of the due date and booking).
After automatic booking has been carried out on a template, the users of the corresponding target groups can be found in the learning template of the course template (Course templates > Participant management - see screenshot in Fig. 2.3). The meaning of the individual columns is explained in Table 2.2.

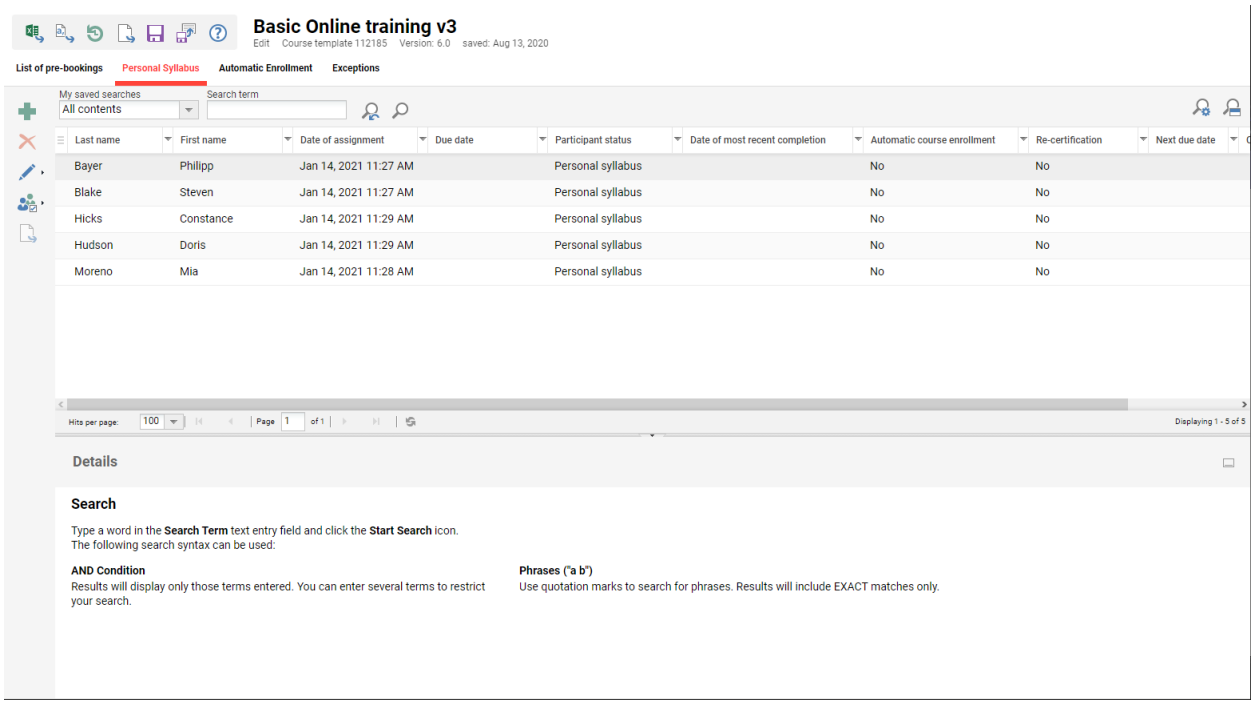

Fig. 2.3: Personal syllabus view.

The columns shown in the screenshot are explained in detail in the following table.

Table 2.2: Column explanation

#	Column name	Description
1	Assigned on	Date of assignment to the learning requirement of this course template.
2	Date of last conclusion	Date of the last conclusion of a course created from this template.
3	To be completed by	Due date for the current recertification run.
4	Next due date	Due date of the next run of the recertification.
5	Participant status	Status of the participant on the course template or the course if a course has been successfully completed in the current run.
6	Automatic course booking	Setting of the respective booking (see #8 in Table 2.1).
7	Recertification	Setting of the respective booking (see #9 in Table 2.1).
8	Current booking	Unique identification of the course the participant is currently booked on.
9	Underlying target group	Name of the target group through which the participant was booked onto the course template.
10	Labelling	Setting of the respective booking (see #1 in Table 2.1).

3 Calculation of the next due date and booking

3.1 Calculation of the next due date

If a user completes a course of a course template on which he is booked for recertification, the status display for this person in the course template changes to "Successfully passed". If the recertification check is now carried out manually or automatically, the system checks whether,

- the user has the status "Successfully passed" on the course template and
- the user is a member of a group for which recertification is activated.

If both apply, the next due date is calculated and entered for the user. This is done depending on the type of deadline:

- "Always valid on DD/MM"
  - "Year of next due date" = Year of " Date of last conclusion " + "Recertification interval".
  - "Next due date" = Deadline in "Year of next due date".
- Due date based on conclusion
  - "Next due date" = " Date of most recent completion " + "Recertification interval".

If a user has not yet completed any courses in the template, no next due date is set, but only the due date in the next step is calculated.

3.2 Calculation of the due date and booking

The second step is to check whether recertification is set for the user. Applies to a learner:

- - "Next due date" - "Days to finish" - "Buffer days" is before or on today's date.

Thus, the "Due Date" for this is calculated as follows:

- If the "Next due date" is at least the number of "Buffer days" in the future, the "Next due date" is taken directly as the "Due date".
- If the "Next due date" is not at least the number of "Buffer days" in the future, the "Current date" + "Days to finish" is set as the "Due date".

Further, the status of the course template is changed to "Personal syllabus". If "Automatic course enrolment" is activated in the automatic booking and a bookable course of the template exists, the user is booked directly onto the next course.

If a user does not have a "Next due date", the next of the following dates in the future is taken as the "Due date".

- " Date of assignment " + "Days to finish".
- The "initial" due date that was set during automatic booking.

Here it also applies that the status of the course template is changed to "learning requirement". In addition, the learner is booked directly onto the next course if "Automatic course registration" is activated in the automatic booking rule and a bookable course of the template is available.

3.3 Important notes

- A change in the automatic booking settings only applies to learners who have not yet been entered in the learning specification on the course template. This means only for "new" learners who have not yet been taken into account by the automatic booking.
- If automatic booking is started manually, it is carried out in two steps. In the first manual execution, the calculation of the next due date is carried out and in the second execution, the calculation of the due date and the booking are carried out.
- The number of buffer days is set to 7 by default and can be changed via the configuration.
- If no value is set for "Days to finish", the value from the configuration is taken (default: 30 days).
- For the deadline type "Always valid on DD/MM" it is recommended to always select a multiple of 12 months.
- Deadline, calculated due date and (initial) due date can easily be confused. As described above, the initial due date only applies to the first booking.
- The metatags "Release for automatic course booking" and "Allow multiple bookings" must be activated on the course template to enable recertification.
- If a user is initially booked and has not yet completed a course, the user is booked directly onto the course to ensure recertification.
- If users who have not yet completed a course are not to be booked directly, this can be ensured by adjusting the activation date annually.

If start or end is near the turn of the year enrolments need to be checked carefully. For example:

- User will get booked to a course on 15.01.2017
- User should finish a course until 30.09.2017
- User ends course on 01.01.2018
- Then the next due date will be 15.01.2019

This needs to be corrected automatically.

4 Examples

The following settings apply to all examples:

- Identification: Mandatory
- Enrolment status: Learning plan
- Automatically add: Yes
- Automatic cancellation: Yes
- Activation date: Blank
- Automatic course registration: Yes
- Recertification: Yes
- Reset SCORM Status: Yes

Further, the configuration Buffer Days = 0 and the default value for "Days to Exit" = 30.

4.1 Example 1

	Assigned on	Date of last conclusion	Due date	Next due date	Booking

– **Due date**
  – **2017-11-20**
– **Days to finish**
  – **2**
– **Deadline-type**
  – **Always valid on**
– **Deadline**
  – **11-10**
– **Recertification interval**
  – **12 months**
	2017-11-07	2016-12-31		2017-11-10	

	2017-11-07	2017-01-01		2018-11-10	
	2017-11-07	2017-11-06		2018-11-10	
	2017-11-07		2017-11-20		yes

4.2 Example 2

	Assigned on	Date of last conclusion	Due date	Next due date	Booking
– **Due date** – **empty** – **Days to finish** – **10** – **Deadline-type** – **Always valid on** – **Deadline** – **11-10** – **Recertification interval** – **12 months**	2017-11-07	2016-12-31		2017-11-10	yes
	2017-11-07	2017-01-01		2018-11-10	
	2017-11-07	2017-11-06		2018-11-10	
	2017-11-07		2017-11-17		yes

4.3 Example 3

	Assigned on	Date of last conclusion	Due date	Next due date	Booking
– **Due date** – **empty** – **Days to finish** – **368** – **Deadline-type** – **Always valid on** – **Deadline** – **11-10** – **Recertification interval** – **12 months**	2017-11-07	2016-12-31	2017-11-10	2017-11-10	yes
	2017-11-07	2017-01-01	2018-11-10	2018-11-10	
	2017-11-07	2017-11-06	2018-11-10	2018-11-10	
	2017-11-07		2018-11-07	2017-11-10	yes

4.4 Example 4

	Assigned on	Date of last conclusion	Due date	Next due date	Booking
– **Due date** – **empty** – **Days to finish** – **empty** – **Deadline-type** – **Always valid on** – **Deadline** – **11-10** – **Recertification interval** – **12 months**	2017-11-07	2016-12-31	2017-11-10	2017-11-10	yes
	2017-11-07	2017-01-01		2018-11-10	yes
	2017-11-07	2017-11-06		2018-11-10	yes
	2017-11-07	2016-12-31	2017-11-10		yes

4.5 Example 5

	Assigned on	Date of last conclusion	Due date	Next due date	Booking
– **Due date** – **empty** – **Days to finish** – **10** – **Deadline-type** – **Always valid on** – **Deadline** – **11-10** – **Recertification interval** – **1 month**	2017-11-07	2016-12-31	2017-11-10	2017-11-10	yes
	2017-11-07	2017-01-01	2017-11-10	2017-11-10	yes
	2017-11-07	2017-11-06		2017-11-16	
	2017-11-07	2016-12-31	2017-11-10	2017-11-10	yes

4.6 Example 6

	Assigned on	Date of last conclusion	Due date	Next due date	Booking
– **Due date** – **empty** – **Days to finish** – **empty** – **Deadline-type** – **Due date based on termination** – **Deadline** – **deactivated** – **Recertification interval** – **6 months**	2017-11-07	2016-12-31	2017-12-07	2017-06-30	yes
	2017-11-07	2017-01-01	2017-12-07	2017-07-01	yes
	2017-11-07	2017-11-06		2018-05-06	
	2017-11-07	2016-12-31	2017-12-07	2017-06-30	yes

4.7 Example 7

	Assigned on	Date of last conclusion	Due date	Next due date	Booking
– **Due date** – **empty** – **Days to finish** – **10** – **Deadline-type** – **Due date based on termination** – **Deadline** – **deactivated** – **Recertification interval** – **6 months**	2017-11-07	2016-12-31	2017-11-17	2017-06-30	yes
	2017-11-07	2017-01-01	2017-11-17	2017-07-01	yes
	2017-11-07	2017-11-06		2018-05-06	
	2017-11-07	2016-12-31	2017-11-07	2017-06-30	yes

4.8 Example 8

	Assigned on	Date of last conclusion	Due date	Next due date	Booking
– **Due date** – **empty** – **Days to finish** – **54** – **Deadline-type** – **Due date based on termination** – **Deadline** – **deactivated** – **Recertification interval** – **12 months**	2017-11-07	2016-12-31	2017-12-31	2017-06-30	yes
	2017-11-07	2017-01-01		2018-01-01	
	2017-11-07	2017-11-06		2018-11-06	
	2017-11-07	2016-12-31	2017-12-31	2017-06-30	yes

4.9 Example 9

	Assigned on	Date of last conclusion	Due date	Next due date	Booking
– **Due date** – **empty** – **Days to finish** – **55** – **Deadline-type** – **Due date based on termination** – **Deadline** – **deactivated** – **Recertification interval** – **12 months**	2017-11-07	2016-12-31	2017-12-31	2017-12-31	yes
	2017-11-07	2017-01-01	2018-01-01	2018-01-01	yes
	2017-11-07	2017-11-06		2018-11-06	
	2017-11-07	2016-12-31	2017-12-31	2017-12-31	yes

4.10 Example 10

	Assigned on	Date of last conclusion	Due date	Next due date	Booking

– **Due date**
  – **empty**
– **Days to finish**
  – **90**
– **Deadline-type**
  – **Always valid on**
– **Deadline**
  – **03-31**
– **Recertification interval**
  – **12 months**
	2018-10-11		2019-01-09	-	yes

	2018-10-11	2018-03-12		2019-03-31	
	2018-10-11	2018-10-12		2019-03-31	
	2018-10-11		2019-01-09	-	yes

5 Testing the recertification

The following steps can be used to test settings in advance:

- Creation of a template.
- Create Course 1 based on the template.
- Creation of Course 2 based on the template.
- Create a target group of 5 users.
- Booking 4 of the users on course 1, then manually setting the status of these users to completed.
- Edit the booking data of the 4 users via the tutor centre and adjust the end date. Interesting values here are:
  - 31.12. last year.
  - 01.01. this year.
  - 7 days ago.
  - Today.
- Create an automatic booking on the template with the target group.
- Start the automatic posting manually.
  - Now the calculation of the "Next due date" can be checked in the tab Learning target.
- Start the automatic booking manually a second time.
  - Now the calculation of the "due date" and the bookings can be checked in the learning target tab.