Course-Planer

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Actions in a course plan

Once the assignments within a course plan have been completed and the learners have started processing the learning contents, following actions are possible within the course plan for an administrator/subadministrator:

Select the **Overview** screen of your course plan to create various <u>reports</u> with learning progress information

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Select the **Reset**, **Complete** and **Delete** screens of your course plan to edit or delete the listed assignments.

- **Reset:** The course status is completely reset for the selected persons
- **Complete:** The course status is set to "completed". The achieved results will remain unchanged.
- **Delete:** The course is removed from the person and the assignment is deleted. Thereby, it does not matter whether the course has been assigned via the course planner or the "Persons" screen.

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Select the **Validity period** screen of your course plan to see the set validity periods of the assignments (grouped and summarized). If the course plan contains multiple courses, for each course there will be a separate group containing all persons with the same validity period.

Manually changing the validity period on the "Persons" screen may create exceptions. Individual persons might thus receive different validity periods. Changing the validity period of an assignment on the "Persons" screen also changes its validity period in the course plan. Such exceptions will be displayed in separate groups in the course plan. This way, it is easy to recognise and consolidate exceptions.

In a course plan, the validity period can only be entered for the listed groups, and not for individual persons. It is not possible to see the persons included in a specific group.

Consolidation of validity periods: All exceptions can be combined into a single group by setting all their dates to exactly the same value.

Setting the validity period:

- Select the group
- Select "Process from" and/or "Process until"

- Enter date(s) and time(s)
- Click on the "Set" button

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Resetting the validity period: To set back the validity period of a group select the "Process from" and "Process until" radio buttons, leave the date and time fields empty and click the "Set" button.

Validity periods can only be set for courses that have already been assigned.

Create course plan (manual route)

The **Course Planner** is ideal for bulk processing of course assignments, whereby persons and courses are added to a course plan within which the assignment can take place. This can either be done manually or the assignment can be automatically generated via one or more rules set within the course planner. It also serves to compile an overview of the current learning progress states of the persons and courses listed in the course plan.

To create a new course planner, go into the **Administration panel > Tools > Course planner** and click on the **New course plan** button. If you wish to reuse the course plan, it is important you enter a name and save it, otherwise it will get lost (however, any assignments done within the course planner will remain active)

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If you decide to manually organize the planner, you can go through the following steps:

1. Add persons via the Persons panel
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2. Select and add the intended courses via the Courses panel
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3. Select the "Assign" screen of your course plan to see all possible assignments. Each person-course combination is listed separately. Select the person you wish to assign a course to and click the "Assign" button to finalise the process.
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   Persons with existing assignments are displayed on the "Overview" screen in the "Links" menu.

> Bulk processing, especially when large numbers of assignments are involved, requires a lot of ressources. Depending on the server, a mass assignment of approx. 5000 persons to a course may take up to 10 minutes. Therefore, be patient when you see the respective information message.

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> If you close a course plan without saving it, your selection of persons and courses will be lost. As they don't depend on the course plan, all related course assignments will remain active. Deleting a course plan only deletes the selected persons and courses. By

reassembling the persons and courses you can create a new course plan.

Should an administrator want to delete a course plan that he doesn't own (for ex. one that was created by a Subadministrator) he will be shown a "Warning - Shared course planner"

Manage e-mail templates

E-mail templates can be used for courses in a course planner. There are 2 default templates for Welcome & Reminder mails, but others can be added by an administrator in the **Administration panel > More > E-mail templates**. Click on **New e-mail template** and in the empty template form:

- select type of e-mail: Welcome or Reminder e-mail
- chose a default language (the language used if there is no translation for a specific language within the template)
- for each language, a subject for the e-mail and the contents you wish to add. By selecting the lables suggested below the editor, in the form of for example [[person prename]] within the content section, the data will be dynamically retrieved and populated based on the created assignments in the course planner
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Click **Save** when you have finished the e-mail definition and the new template will become available for you in the courses within the course planner.

> **Changes in the email template**
> If you make changes in the email template, they will not be applied to an already added email. To do this, the mail must be removed from the course and added again to the course from the email template.

Sending a Welcome mail via Course Planner

In the Course Planner it is possible to define Welcome mails that are sent to the learners' e-mail addresses as soon as a course has been assigned to them. These mailing rules can only be defined in the Course Planner. The mailing rule and mail content added to a course are linked to this course and function only as long as the rule is connected to the course.

1. In the course section of the course plan select the required course for which you wish to define the Welcome mail.
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2. In the course details, scroll down to reach the E-mail rules section, then click on Add, select the E-mail template you would like to use and confirm by clicking on Select

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3. Click on the required mail template on the list to display the text to be dispatched. img
4. As you can see, the mail content was created according to the email template. You can now edit the content further. Click on the Edit button at the bottom. Text changes can now be made here.
   Via the default language you define the e-mail language to be used in case a learner selected a language in his or her profile for which there is no e-mail translation available.
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5. To edit the dispatch time of a Welcome mail, insert the required time difference in the respective fields (first field for number of days, the second for number of hours). If more than 24 hours are inserted into the "hours" field, they will be converted into days / hours. Therefore, 25 hours will become 1 day / 1 hour.
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6. When the template is added to the list, it is displayed with the status "deactivated". In order to enable email sending once you've configured it to your wishes, you need to click on the Actions dropdown, select Enable e-mail rules, select the email and click Save. The status will now be changed to "activated" and the email can be sent out according to your previous settings
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Sending a Reminder mail via Course Planner

In the Course Planner it is possible to also define Reminder mails that are sent to the learners' e-mail addresses to remind them of the assignment according to your defined rules. These mailing rules can only be defined in the Course Planner. The mailing rule and mail content added to a course are linked to this course and function only as long as the rule is connected to the course.

1. In the course section of the course plan select the required course for which you wish to define the Reminder mail.
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2. In the course details, scroll down to reach the E-mail rules section, then click on Add, select the E-mail template you would like to use and confirm by clicking on Select
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3. Then click on the just added mail to see its content. img
4. As you can see, the mail content was created according to the email template. You can now edit the content further. Click on the Edit button at the bottom. Text changes can now be made here.
   Via the default language you define the e-mail language to be used in case a learner selected a language in his or her profile for which there is no e-mail translation available.
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5. Currently, Reminder mails can only be dispatched if a validity period (start/end date) has been defined for the courses. You set up this definition with the function "Validity period"

while assigning the courses to learners (see appropriate section in <u>Actions within a course plan (reporting, setting validity periods)</u>

Effective Date: Define the key event to which the rule will be aligned (the start time of the course, the end time of the course or the moment of assignment to the course)

Distribution: Define whether the dispatch will take place before or after the defined date in the previous step.

Time difference: The time difference indicates the difference to the key event with which the mail is to be dispatched.

For Reminder mails, please don't define a dispatch date before the assignment date.

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6. When the template is added to the list, it is displayed with the status "deactivated". In order to enable email sending once you've configured it to your wishes, you need to click on the Actions dropdown, select Enable e-mail rules, select the email and click Save. The status will now be changed to "activated" and the email can be sent out according to your previous settings

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Conditions for an email to be sent

If a user has not yet assigned the course, an e-mail will be sent as soon as the course is assigned and the following conditions are met:

1) Mail rule is activated
2) User has not started the course yet or
3) User has already started the course but not yet finished

If a user has already assigned the course, an e-mail is sent as soon as the mail rule is activated and the following conditions are met:

1) User has not started the course yet or
2) User has already started the course but not yet finished

Changes directly in the mail
Changes made directly in the mail are only valid *for this mail in this course and will **not** be included in the email template*. If you delete this mail, the changes made will also be lost.

Changes in the email template
Conversely, if you make changes in the email template, they will **not** be applied in an already added email. To do this, the mail must be removed from the course and added again from the email template.

Course planner (rules and automatic assignments)

For creating bulk assignments, you can always manually add persons and courses to a course planner and then create the assignment. However, there is also an easier, rules-based way to create the assignments without a lengthy search process.

Description of the automatic assignment process

- Within the saved course plan, on the **Rules** screen you can define the criteria to be used for adding persons to the course planner and for automatically assigning them to the pre-selected courses within the planner
- The first step involves the definition of rules. The criteria you can chose from are the property groups **organisation unit** or **jobdescription**, **language**, as well as criteria from the **optional property groups**, which refer to persons and were previoulsy created by SLH. For these criteria you can specify whether you wish to include their child-elements (activate toggle "*Including child elements*") or whether you use the criterion to create a negative rule ("*does not contain*")
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- If you look at the screenshot with the "Criterion combination" rule, you can see that all persons will be added in the course planner that are part of the organisation unit "Management" **AND** have the job description "Manager" **AND** have selected their profile language to be German or Italian (therefore the "does not contain" French and English criterion)
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- You can save as many rules as wanted, but please take into consideration the fact that the rules have an "**OR**" behavior between each other, which means that hits to each rule will be added to the course
- Add the desired courses to the courseplan via the Courses panel
- The course assignment will happen either automatically during the night or it can be triggered manually by clicking on the button "Execute"
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> Pre-existing assignments will not be affected by the rule execution * Deleting a rule after its execution will not delete the assignments created on its base