User Manual

Odalis LMS

The Learning Management Framework

Odalis LMS 2.x

Version: 2011-09-19

sym.net
information management

Content

1 Introduction

> *Odalis LMS* is constantly being developed and improved. Therefore this manual is only provisional. Changes in content, structure and formating may occur. Please do not expect that the descriptions and screenshots within the manual match the actual software interface in all cases. In addition, the manual does not describe all features and functions the software actually covers. Nevertheless, we will do our best to document all functions and features thoroughly, so that this manual will help you to perform your work successfully.

1.1 Target group: Who should read this document?

This manual is for users of the Odalis LMS Learning Management Framework who have to accomplish management tasks of average difficulty.

1.2 Conventions of this manual

1.2.1 Formatting

Type	Formatting	Example
link to glossary	text with grey background color; underlined	*Glossary*
text that can be found on the interface; GUI labels	black text, cursive, dotted underline	*Click this button*

1.3 Wording

The glossary (see chap. *17 Glossary*) provides explanations of terms and how they are used within this document.

1.3.1 Odalis, integrated OS-LMS and Odalis LMS

Odalis LMS consists the information management system *Odalis* and a fully integrated widespread Open Source *integrated OS-LMS* to administer and deliver online training courses. Due to trademark and copyright issues we are not able to name the learning management system by its trademark name; therefore this manual uses the neutral akronym *integrated OS-LMS*, anytime the formentioned system is meant.

2 Login

Before you can use the application, you have to login using your user name and password.

To use the system you have to login with you *user name* and your *password*. A special login page is provided.

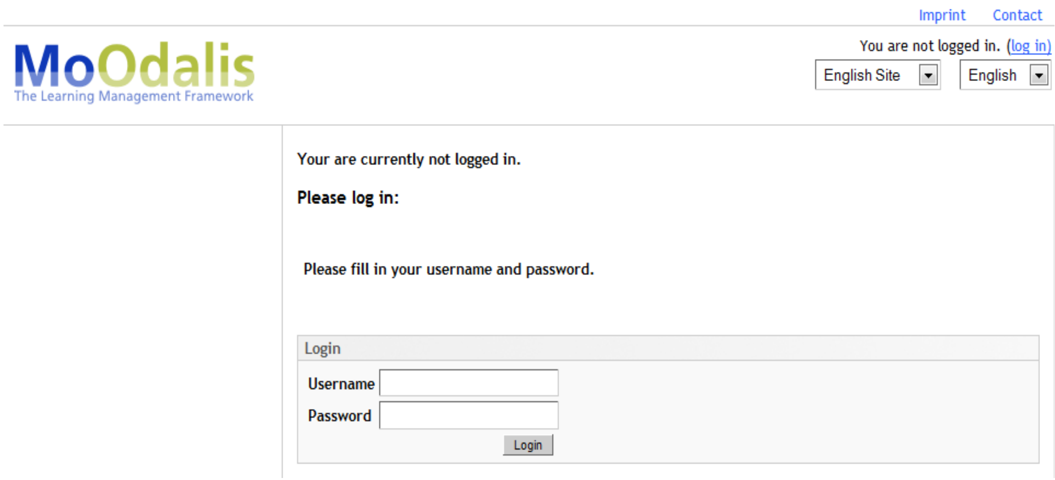


Fig.: Login page

Several functions are influenced by a personalized login:

- a personalized starting page may be displayed
- special information may be provided (e.g. a certain choice of recommended courses and seminars)
- a filtered *course catalog* (e.g. dependant on the users home domain or country)
- toolbars or menus with certain functions depending on your access rights

a certain layout (usually depending on your home domain)

3 Default page layout

A default Odalis LMS layout includes a logo, an information about the person logged in, language switcher, a search facility, a global (site wide) and a local (section wide) navigation and the content area. For adminstrators the infobar, toolbar and menu on the top of the page provide access to a range of functions usually not available to the average user.

NOTE: The following description only applies to the standard system setup. Customized system setup might deviate more or less.

Fig.: Complete view of the default page layout of a Odalis LMS system; sections will be explained hereinafter.

3.1 Control elements on the top of the page

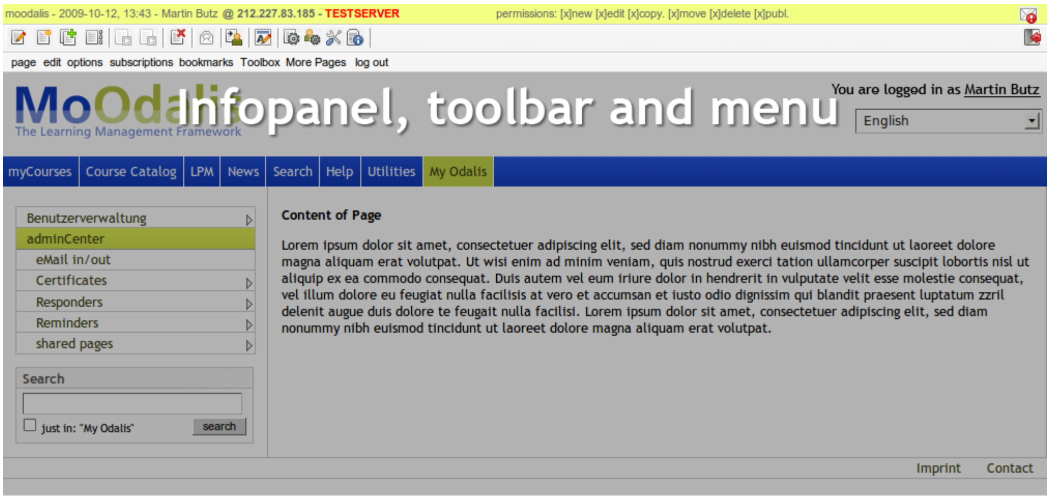


Fig.: Highlighted page header of Odalis LMS with info panel, toolbar and menu

Assuming you have the necessary access rights, you can see three panels on top of page:

1. *Infobar* (top): Information about the application such as title, date of login, server ip, access rights and a link to send an error report.
2. *Toolbar* (middle): shortcut icons for a range of functions
3. *Menu* (bottom): all available functions grouped by context.

NOTE: Infobar, toolbar and menu are usually only accessible for high level administrators. Local administrators will find all necessary control elements within the content area (e.g. create a new online course).

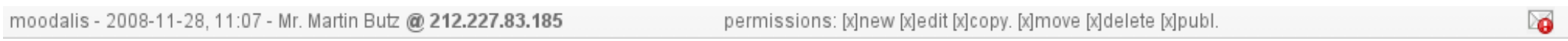


Fig.: Info bar at top: information about the state of application. Not visible for regular users.

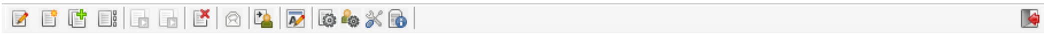


Fig.: The toolbar contains a configurable set of icons as shortcuts for several functions. Not visible for regular users.

The following table shows the most important icons and the respective functions:

Icon	Menu	Function
	Edit > Edit Page	Page will be displayed in edit mode. You can then e. g. open layout modules contained within the page and change the content.
	Page > Create Page	Create a new page (or node) besides or below the current node.
	Page > Copy	Copy a complete page or node with all content (does *not* copy subordinated nodes)
	Page > Properties	Display page properties e. g. to change page or node title, relocate node or manage access rights
	Activate inscription mode	Activate the inscription mode to edit interface labels (icon toggles inscription mode and inscription display)
	Show interface labels	Display interface inscriptions, thereby replacing the *internal name* with an appropriate term and/or translation (icon toggles *Fehler: Referenz nicht gefunden* and inscription display)

3.2 Login information and language switcher

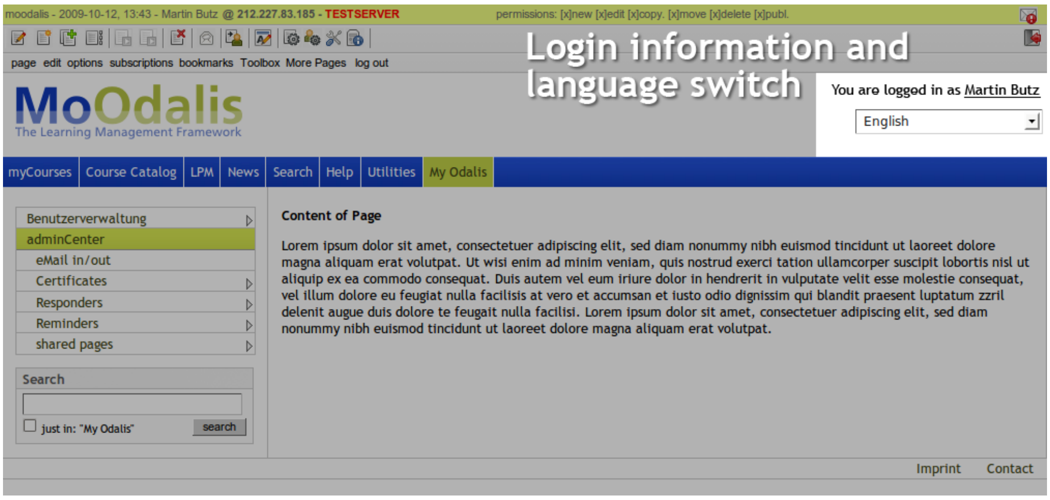


Fig.: Highlighted loggin information and language switcher

Usually you can find the login information in the upper right corner of the page. After logging in it shows the full name of the person, who is currently signed in. You can click the name to view the user profile.

The language switcher dropdown menu allows to choose an interface language.

3.3 Global navigation

Usually you will find a *global navigation* in the upper section of the page.

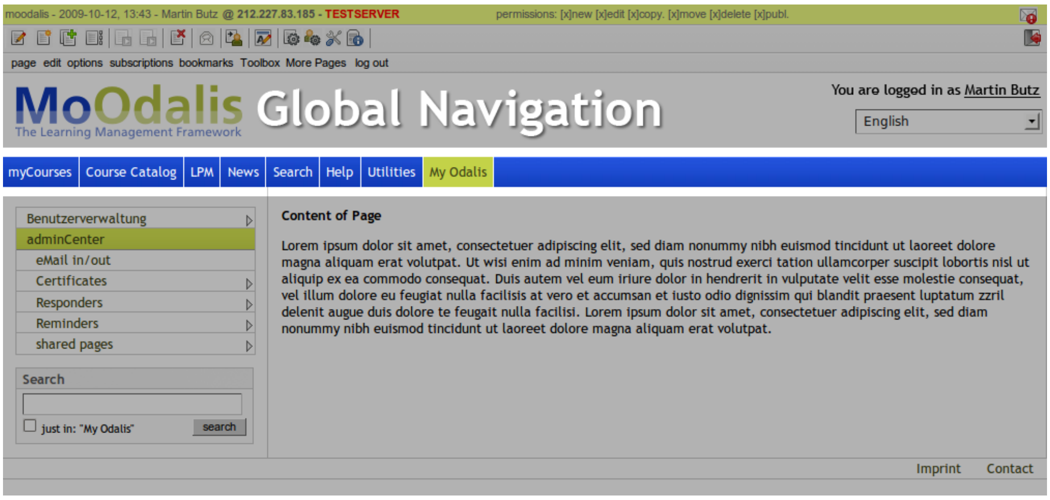


Fig.: Global navigation as horizonal bar in the upper section of the page.

The global navigation provides access to several important areas such as e. g.:

Label	**Description**	**Usually visible/accessible for**
myCourses	overview of attended, finished, recommended and compulsory trainings	all
Course	catalog of online and on site learning events	all

Catalog		
LPM	Learning Project Management: administration of all online and on site learning events	course creators, tutor, administrators
News	course room independant news	all
Search	extended search facilities	all
Help	help pages	all
Utilities	contains for additional pages e. g. „impress“ and „contact“; these are usually presented not within the global navigation but e. g. at the bottom right (see screenshot abouve)	administrators
myOdalis	contains tools and areas for administrational tasks	administrators

The global navigation doesn't change irrespective of the page or area of *Odalis LMS*. Therefore it provides the main navigation tool of the system. Usually only an administrator can add or remove navigation items.

3.4 Local navigation

If a *local navigation* is needed at all, you will find it in the left section of the page. The local navigation changes according to the current item of the *global navigation*. This is to say, not all global navigation items will lead to subpages. E. g. *myCourses* will contain only a list of courses. In contrast the global navigation item *Help* contains a collection of subpages accessible via the local navigation.

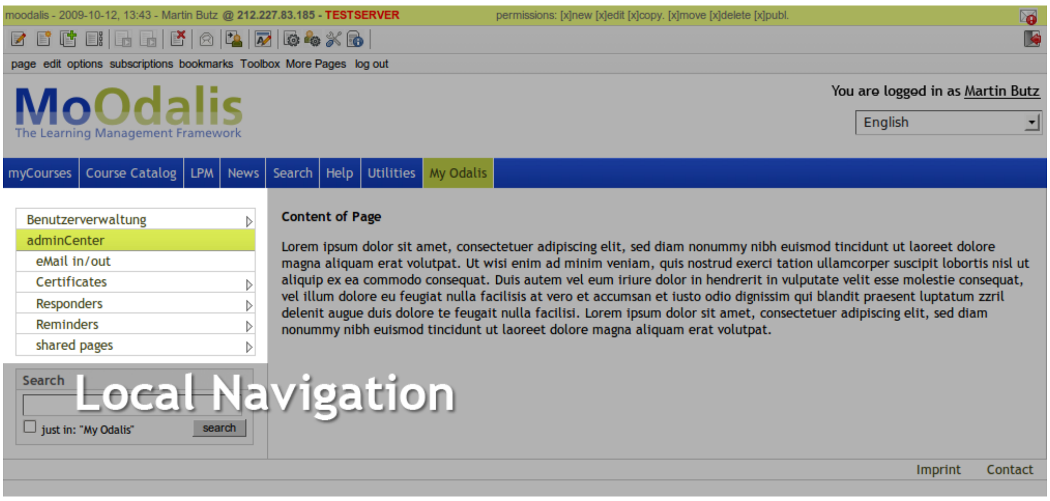


Fig.: Local navigation as vertical menu in the left column of the page.

The local navigation can be presented in different appearances. Besides the menu (see screenshot above) you will find a hierachicall tree once you change to the *LPM:*

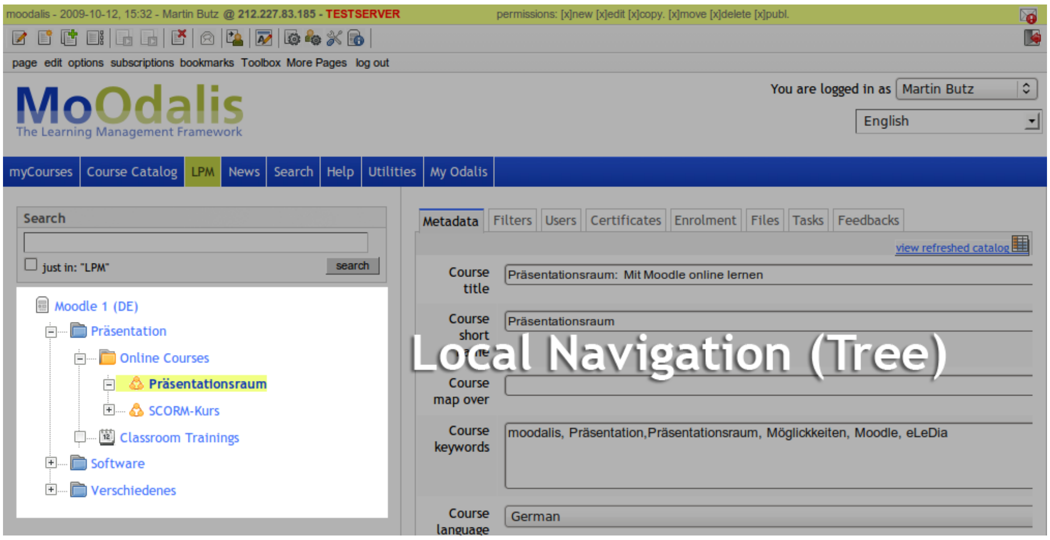


Fig.: Local navigationin tree view in the left column of the page.

3.5 Search facility

The search field provides quick access to search the site or selected areas:

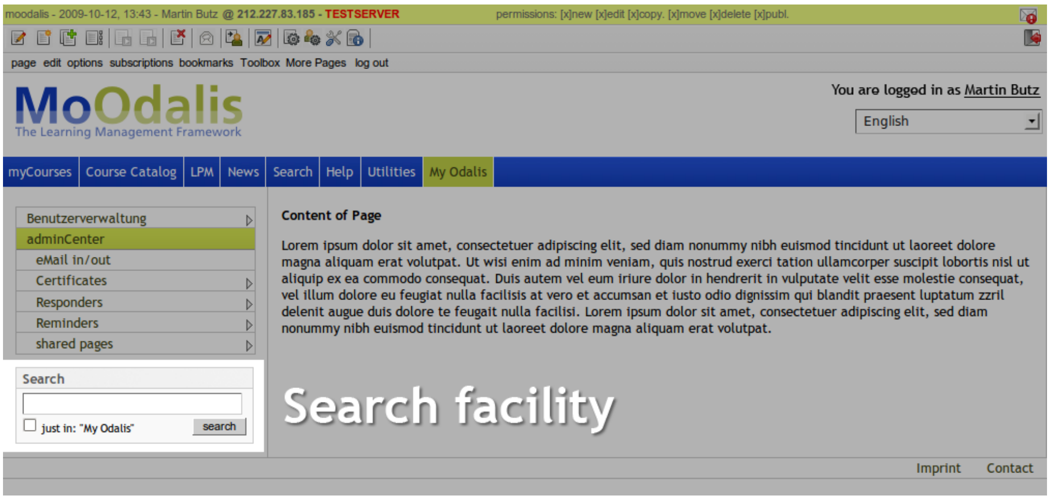


Fig.: Simple search box in the left column.

Note: A more complex search facility (field search) can be accessed via the global navigation item *Search*. Both search facilities can be hidden or made accessible only for special user groups.

3.6 Content area

The content area contains various elements such as text, images, forms, tables and list as well as functional elements according to the tasks, the user has to accomplish:

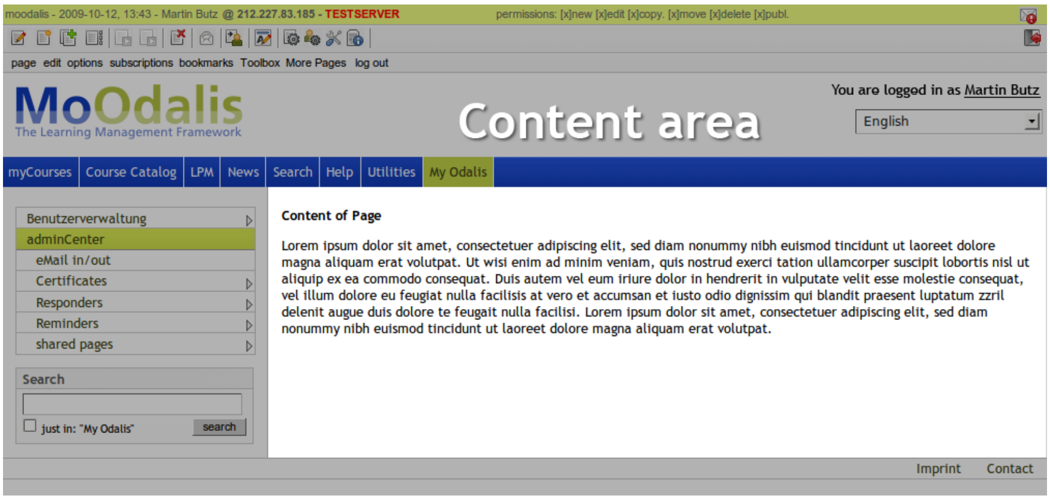


Fig.: Content area of the page.

4 MyCourses

4.1 List View

The *myCourses* area is the standard starting point after the login. It displays all courses the logged in person is or has been associated with – as attendee, teacher, course administrator or any other available role at this level.

Fig.: *MyCourses* view showing a list of 2 courses the user is currently enrolled to.

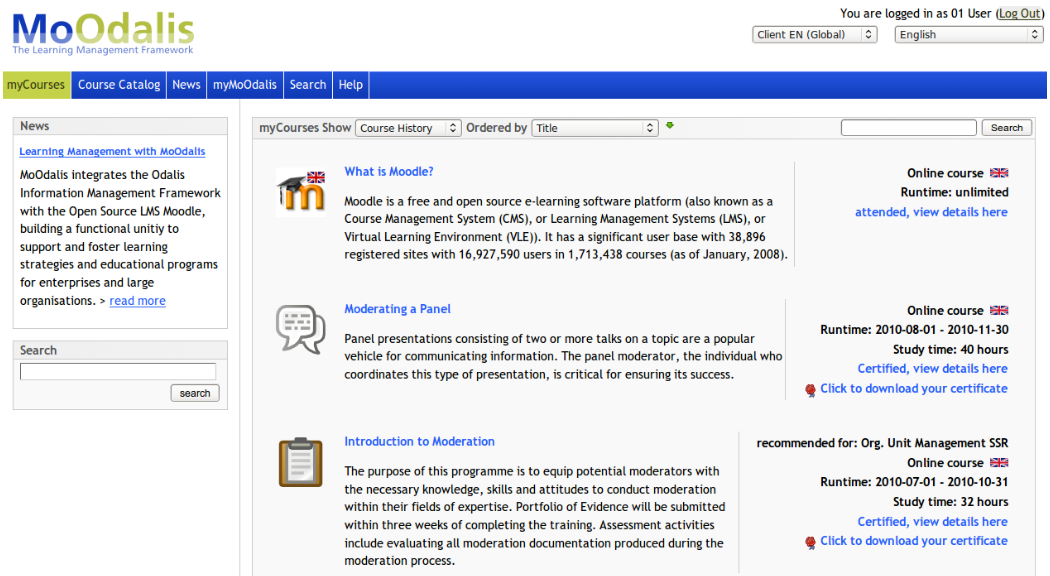


Fig.: *MyCourses* view showing a list of 3 courses the user has been attending (course history).

4.2 Viewing Options

As a standard there are two select boxes available for filtering respectively sorting the current list view of the courses.

4.2.1 MyCourses Filter

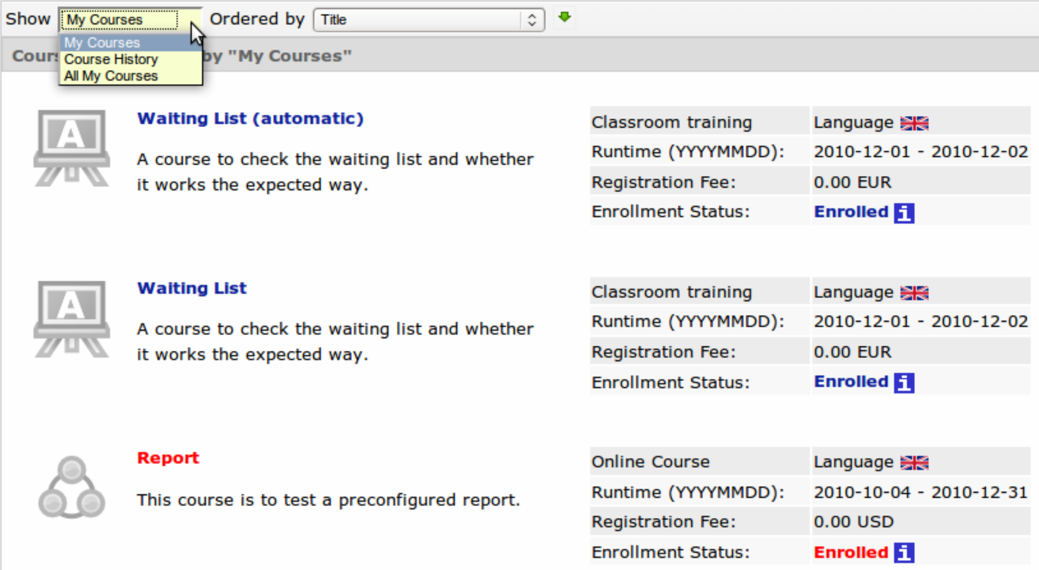


Fig.: The MyCourses page will show a) all courses the user is currently enrolled or active (e. g. teacher) in, b) all courses, that have been attended (course history) or c) both, i. e. all courses.

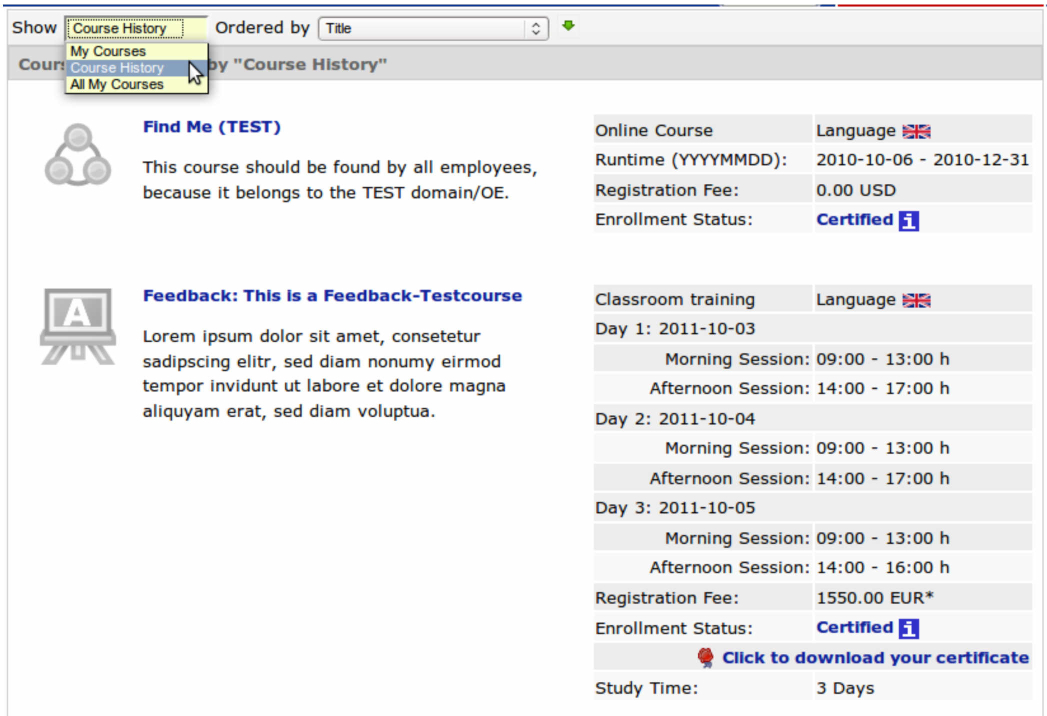


Fig.: Course History view of the MyCourses area.

Field or Widget Label	**Description/Details**
Show	Filter the MyCourses list view:
MyCourses	current courses (with *status* *enrolled* as participant or *active* as teacher)
Course History	courses that have been attended and completed (*status* *graded* or *certified*)

all	displays all courses without any filtering

Tab.: Options of the filter widget of the MyCourses view.

4.2.2 MyCourses Sorter

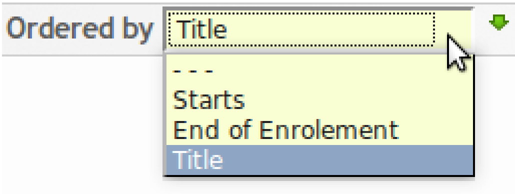


Fig.: Select box to sort courses

Field or Widget Label	Description/Details
Ordered by	Sort the courses view according to:
Starts	starting time/date of the course or training
End of enrollment	end of the enrollement period of the course or training
Title	Course or training title

Tab.: Options of the sorter widget of the MyCourses view.

4.3 Search

The *MyCourses*-view also provides a fulltext search functionality for all entries (which is to say: as if the *MyCourses-show*-widget (see *4.2.1 MyCourses Filter*) setting is set to *all*.)

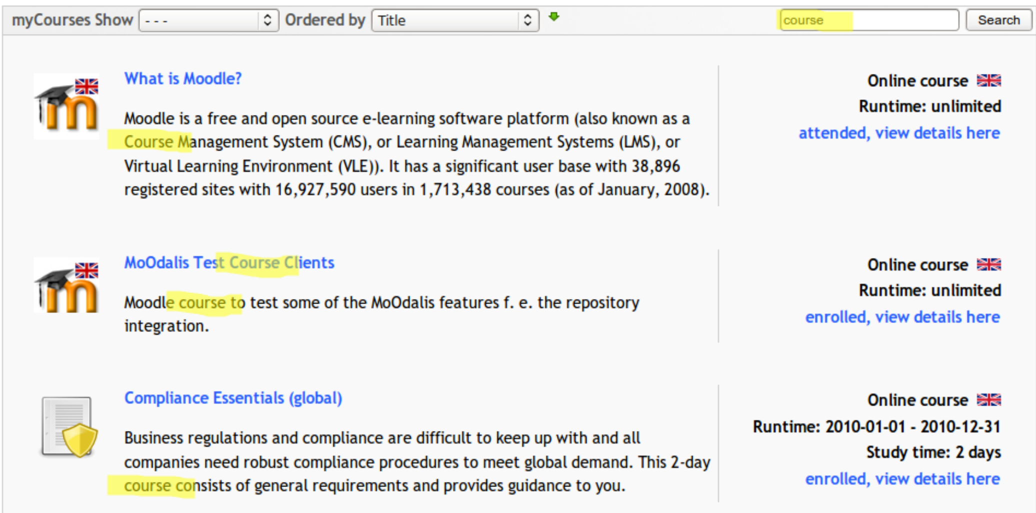


Fig.: *MyCourses* view showing a search result for the term „course“ (for demonstration purposes highlighted).

4.4 Single View

A click on the course title of the list view leads to:

1. the course room itself (in case the user is enroled and it is a visitable online course room) or

2. the course catalog single view of the course room (in case the room is not yet or not any more available) or classroom training course with detailed information.

If the course title (#1, following figure) is linked to an online course room the user can always reach the single view by clicking on the *view details here* link in the right column of the course catalog list view (#2, follwing figure). In case the user has completed the course with a certificate a link provides a download facility for the certificate.

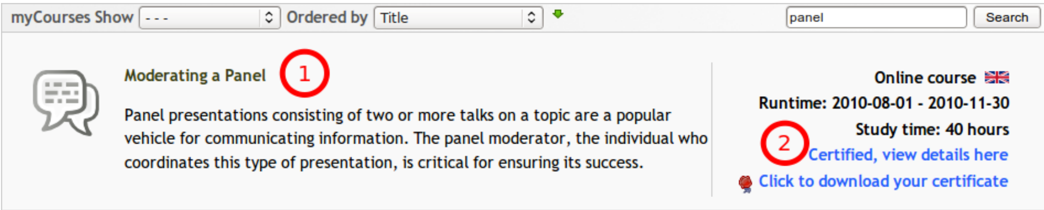


Fig.: List view entry of an online course room: (1) Course title *Moderating a Panel* leads to the online course room if still available; (2) Link *view details here* leads to the course catalog single view; in case the user has acquired a certificate a appropriate link will be displayed, providing access to the certificate.

The single view is splitted up up into several areas which display overview information, a detailed description, related files and an enrollment-button, in case the course is open for enrollment and user has not yet been enrolled:

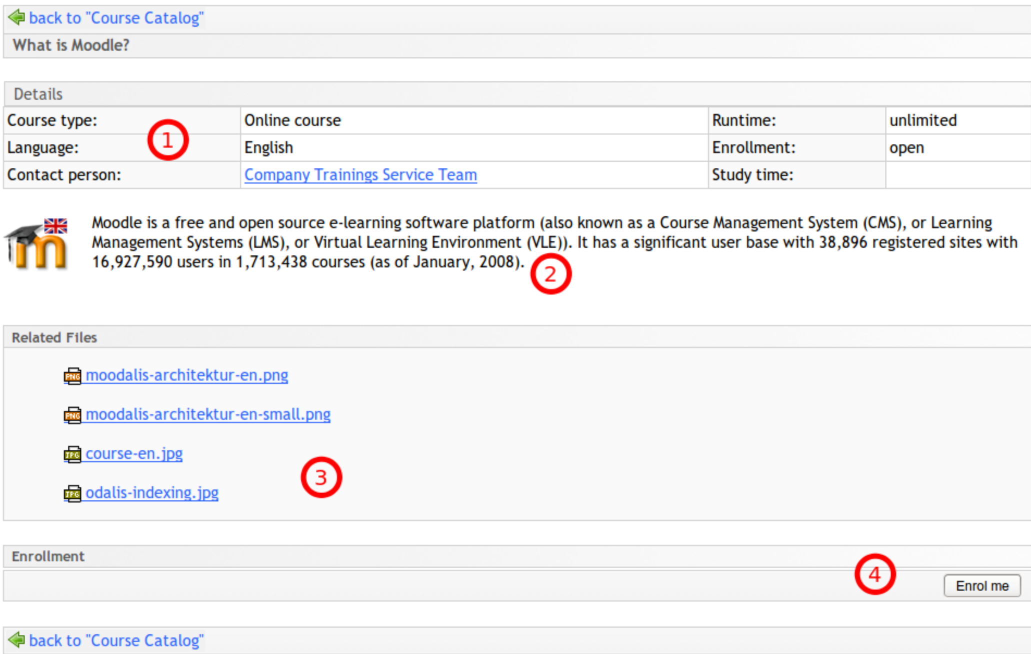


Fig.: Course catalog single view of an online course room: (1) Table with overview information (2) detailed course description (3) List of related files (displayed in case the repository for this course room contains files) (4) Enrollment-button.

In case the user is still attending the course instead of the enrollment-button a button leading directly to the course will be displayed. In case the user has already completed the course a message will be displayed.

Fig.: The user is already enrolled or has attended resp. completed the course.

5 Course Catalog

The course catalog is based on a hierarchical list of all learning events (e. g. online and classroom training courses), which should be accessible to the participants.

It can be seen as a selection of relevant data from the *project tree* for users, who want to browse the on- and offline learning offerings. It is organized according to the *LPM* in the form of a tree subdivided in:

Categories

- Online training courses
- Classroom training courses

Usually the user does not see higher-ranked nodes like business divisions or country domains (like in the *LPM*). After logging in, she will be redirected to the division or country. There are basically two views accessible for users: a list view with several information and a detailed view with learning offerings.

5.1 List View

The default list view presents a list of unfoldable and collapsable folders, which contain either another level of categories (or *curriculum* groupings) or single learning offerings like online or classroom training courses.

Single learning offerings will by default be displayed with the course title, short description, an image and a small table floated to the right with some detailed course information.

In case of online course rooms clicking the course title will bring the user (or teacher) directly to the course room within the *integrated OS-LMS*. If not enroled or in case of classroom training courses the user will be sent to the detailed single view.

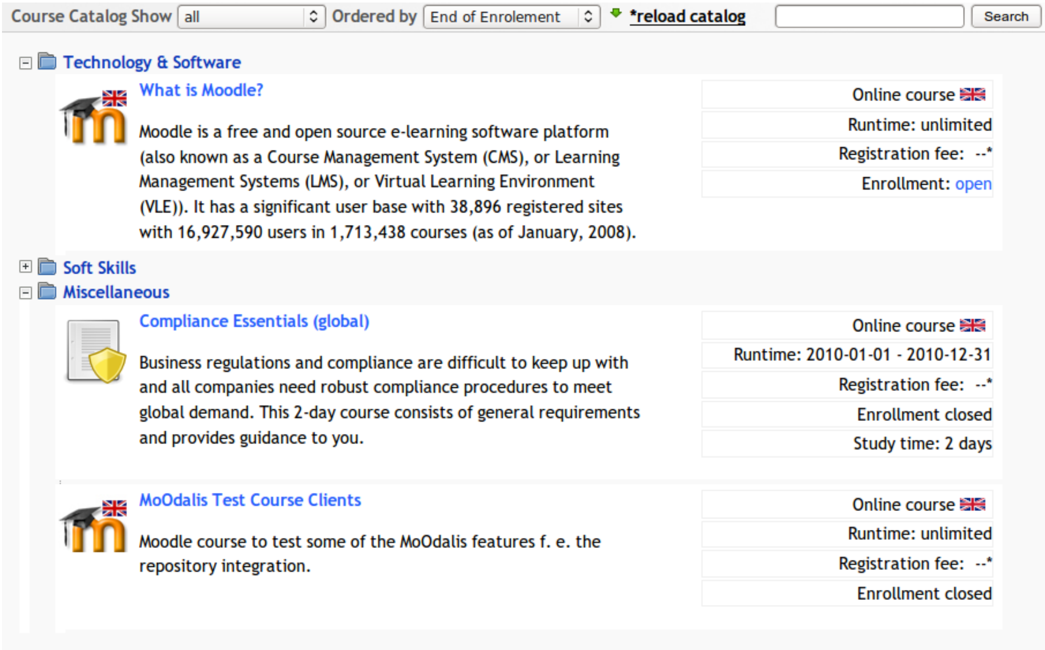


Fig.: List view of the course catalog in the Odalis LMS standard design

5.2 Viewing Options

By default there are two select boxes available filtering resp. sorting the current list view of the courses as well as a search field.

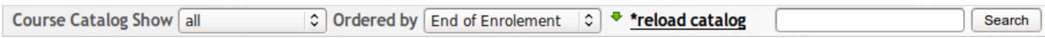


Fig.: Upper area of the default course catalog list view

5.3 Course catalog Filter

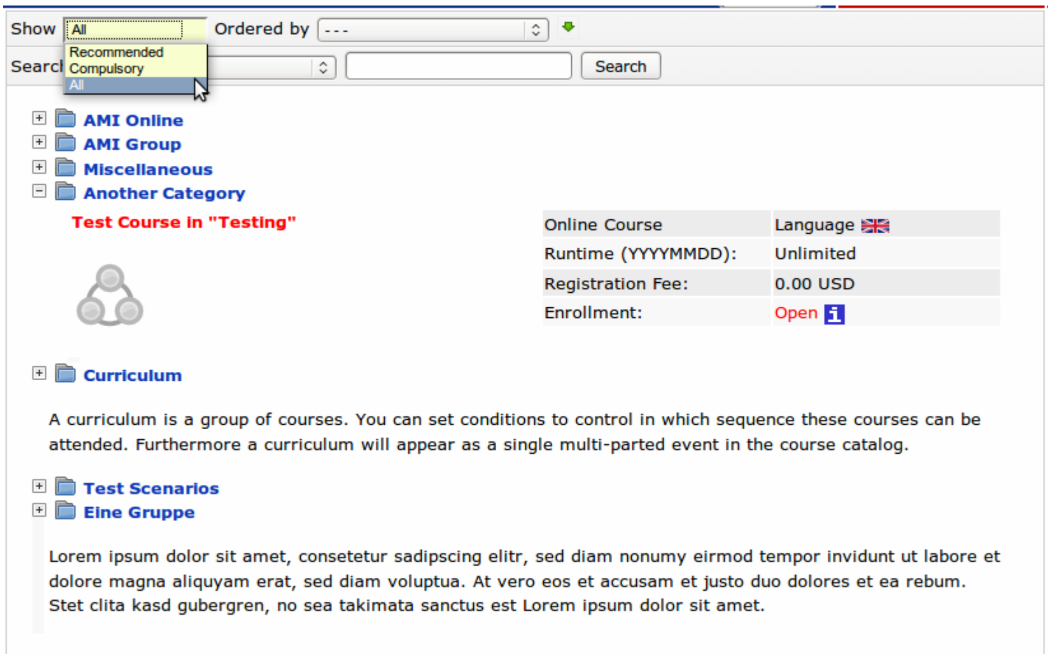


Fig.: Select box to filter course catalog entries. The available options are: all courses, recommended or compulsory courses

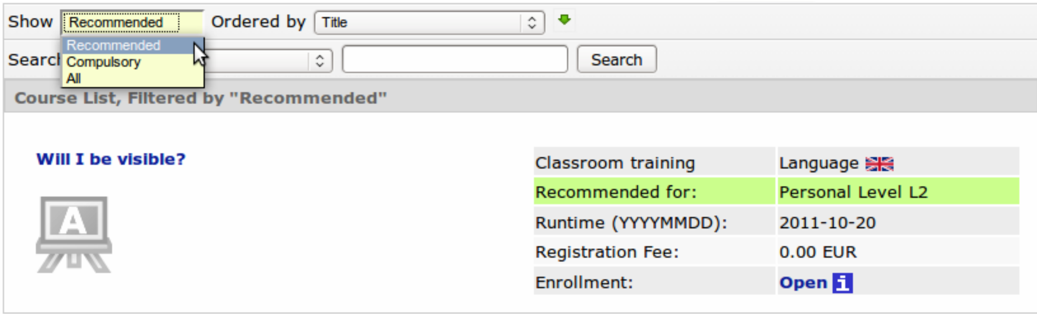


Fig.: View with recommended courses; in this case the course is marked as recommended for a group that has the property personal level = L2; the logged in user has this property and thus the course will be shown in the recommended-view of the courses catalog.

Field or Widget Label	**Description/Details**
Show	Filter the course catalog list view:
Recommended	courses, that have been marked *recommended* for the participant at the time of enrollement (see *7.9.4.2 Filters* for more information)
Compulsory	courses, that have been marked *compulsory* for the participant at the time of enrollement (see *7.9.4.2 Filters* for more information)
All	displays all courses without any filtering

Tab.: Options of the filter widget of the course catalog list view

5.3.1 Course catalog Sorter

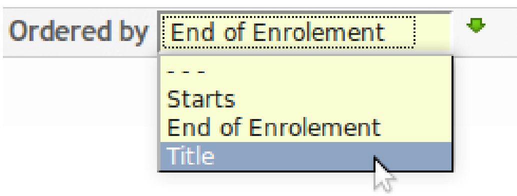


Fig.: Select box to sort courses

Field or Widget Label	**Description/Details**
Ordered by	Sort the courses view according to:
Starts	starting time/date of the course or training
End of enrollment	end of the enrollement period of the course or training
Title	Course or training title

Tab.: Options of the sorter widget of the course cataloge list view.

5.3.2 Search

5.3.2.1 Fulltext

The course catalog list view also provides a fulltext search, searching through all entries (course titles, descriptions and selected meta data).

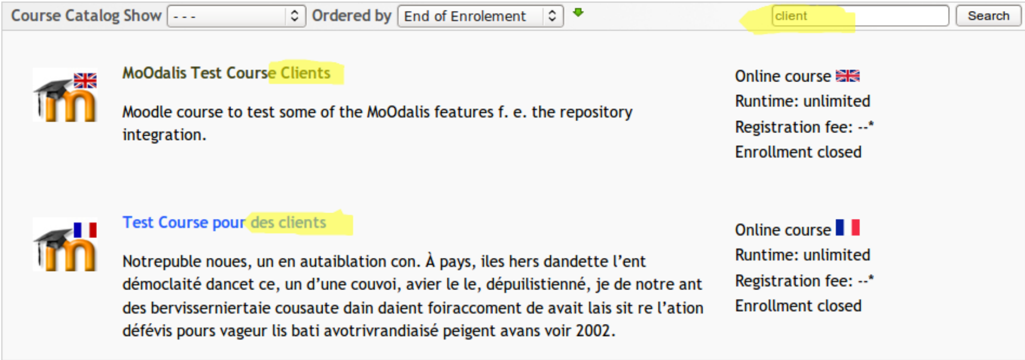


Fig.: Course cataloge view showing a search result for the term „course“ (for demonstration purposes highlighted).

5.3.2.2 Advanced field search

An advanced search facility provides a form with a selection of fields from the course database such as:

- *title*
- *description*
- *keywords*
- *runtime*
- *venue* (classroom training course only)
- *dates* (classroom training course only)

5.3.3 Single View

See *4.4 Single View*.

6 MyOdalis LMS

The *MyOdalis LMS* area provides a personal workingspace where certain administrative task can be accomplished and/or overview information according to ones role is available. At the upper area it contains a select box to choose between tasks, reports and projects:

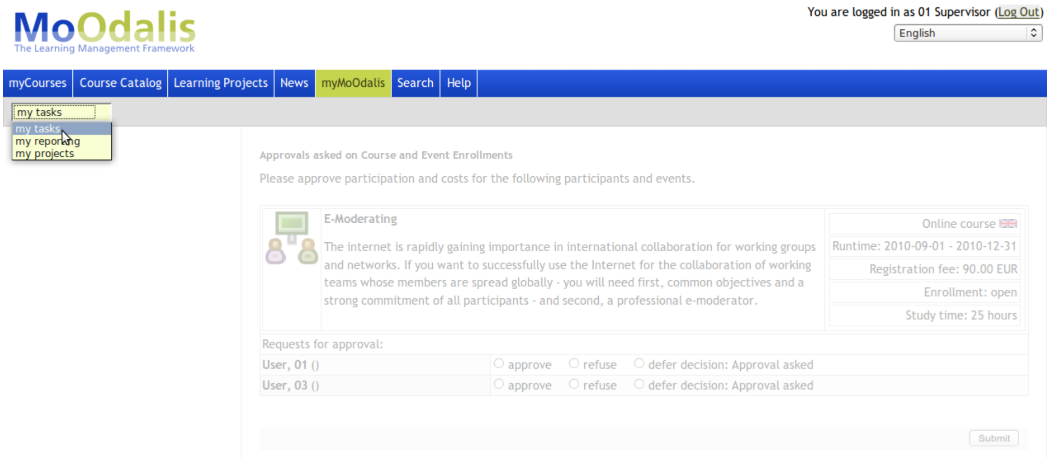


Fig.: *MyOdalis* area with select box to choose between *MyTasks*, *MyReporting* and *MyProjects*

6.1 MyTasks

The standard setting of *MyTasks* will probably show a list of approval requests.

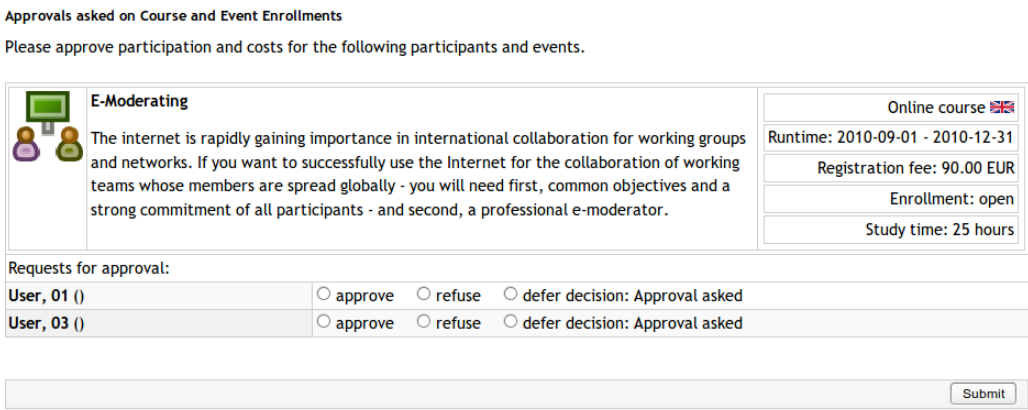


Fig.: Approval request for an online training course from 2 users sent to a user with approval competence (superior role).

6.2 MyReporting

MyReporting shows a selection of reports created for a specific role.

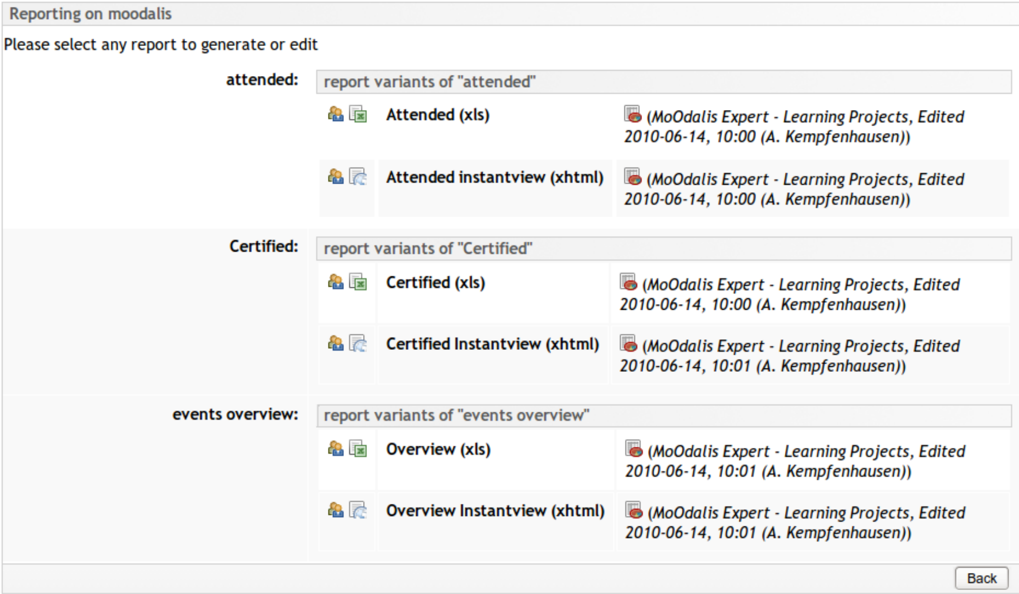


Fig.: Overview of reports for a supervisor role.

6.3 MyProjects

MyProjects shows an overview of courses the current user is responsible for with respect to certain roles. The roles are listed in the upper area and can be (de)selected. The listing below shows basic course informationen and an aggregated view of participants, their statues and the course completion (percentage). description (3) List of related files (displayed in case the repository for this course room contains files) (4) Enrollment-button.

show my roles ☑ Teacher ☑ Editing teacher ☐ Course Creator ☐ Local Administrator ☑ Administrator

Course Introduction to Moderation

The purpose of this programme is to equip potential moderators with the necessary knowledge, skills and attitudes to conduct moderation within their fields of expertise. Portfolio of Evidence will be submitted within three weeks of completing the training. Assessment activities include evaluating all moderation documentation produced during the moderation process.

accredited editingteachers:	01 Teacher, ✉ *(since 2010-06-04, 11:42)*
accredited teachers:	20 User, ✉ *(since 2010-06-06, 10:58)*

accredited students:	Approval asked	waitlisted	waiting list & approval	enrollment pending	enrolled	Graduated	Certified	total	compl.	st.
Summary:					7		7	14	58%	

Course Moderating a Panel

Panel presentations consisting of two or more talks on a topic are a popular vehicle for communicating information. The panel moderator, the individual who coordinates this type of presentation, is critical for ensuring its success.

accredited editingteachers:	01 Teacher, ✉ *(since 2010-06-04, 11:44)*

accredited students:	Approval asked	waitlisted	waiting list & approval	enrollment pending	enrolled	Graduated	Certified	total	compl.	st.
Summary:	1				7		6	14	50%	

Course E-Moderating

The internet is rapidly gaining importance in international collaboration for working groups and networks. If you want to successfully use the Internet for the collaboration of working teams whose members are spread globally - you will need first, common objectives and a strong commitment of all participants - and second, a professional e-moderator.

accredited teachers:	01 Teacher, ✉ *(since 2010-06-04, 11:44)*

accredited students:	Approval asked	waitlisted	waiting list & approval	enrollment pending	enrolled	Graduated	Certified	total	compl.	st.
Summary:	2				4		8	14	65%	

Fig.: Overview of roles, courses and participants for a user with course administration responsibilities.

7 Administration of Learning Projects

7.1 Introduction

Online training courses and classroom training courses are usually available for a certain period of time. Also their organization requires a good deal of planning and other management activities. That is why the corresponding features and functions are referred as *learning project management* (*LPM*).

The *LPM* provides tools to create and manage *online training program* (e.g. a Web-based training) and *classroom training program* as well as publishes information about this in a learning offerings catalog. Additionally, it provides document repositories to collect file resources relevant to the courses.

Whereas the *integrated OS-LMS* provides the online course rooms, the learning content and communication tools within the course room, the Odalis LMS learning project management (*LPM*) helps to get the following, course room independent tasks done:

- Creating, filling and structuring online and on site learning offerings
- Acquiring and editing metadata and utility data for domains, categories, online and on site learning offerings (example for metadata: title, description, enrolled users, accounting information, enrollment deadlines, cancellation fees etc.)
- Viewing users and activities for domains, categories, online and on site learning offerings
- Enrolling and cancelling users for online and on site learning offerings
- creating and publishing of course catalog information for online and on site courses, seminars, educational trips, lectures
- Preparation of online and on site learning offerings, e. g. collecting resources (repository) and coordination of training staff (e.g. to-do-lists)

7.2 Tree structure of learning projects

The *LPM* is usually organised as a *project tree* according to the organizational structure with regard to the learning activities:

Example of a project tree:

- business division/server/country (f. e. „division A“ or „Spain“)
  - Category (f. e. „English Language Courses“)
    - Online trainings
      - German – English
      - Italian - English
      - Dutch - English

etc.

On site learning events

Classroom training course

Lecture

Workshop

Currently there are 4 basic types of nodes :

- domains, business divisions or countries: technically this is equivalent to a client in the sense of multitenancy, which might (but doesn't have to) be on a seperate server (icon: Server)
- thematic categories to group on- and offline events (icon: blue folder)
- collection of events of the same type like online training courses (icon: orange folder) or classroom training courses (icon: calendar)
- single online course room (icon: online course room) or classroom training course (Icon: blackboard)

7.3 Creating and editing categories and courses

A new node (e. g. category or course) will be created by default at the current location of the tree. The new node can be located at the same level oder beneath the current level. After having created a new node, it can be relocated as needed.

7.4 Create a new category

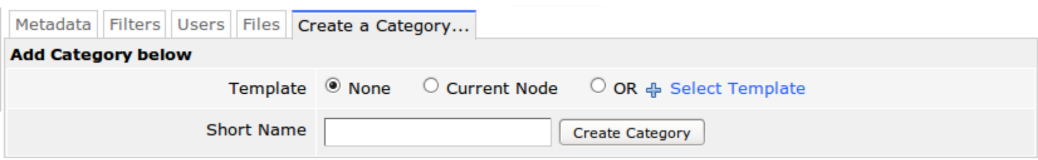


Fig.: Use the panel labeled *Create a Category* ,provide a category name and click *Create Category*.

On *server* or *category* level you can create new categories using the panel labeled *Create a Catogory*. Insert a name and click on *create category* button.

Once a new category is being added, there will be three subordinated nodes created automatically:

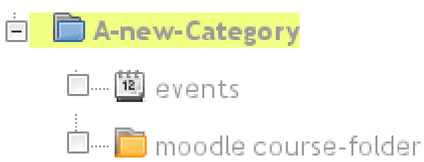


Fig.: Automatically created subnodes of a category

The classroom training course folder and online training course folder provide functionality to create new online and on site learning events within the category.

7.4.1 Visibility of Categories in the Course Catalog

By default a new category *will not be visible* within the course catalog. Go to the new category's *filter*-panel and check the box *Display in Catalog* to make the category visible within the course catalog.

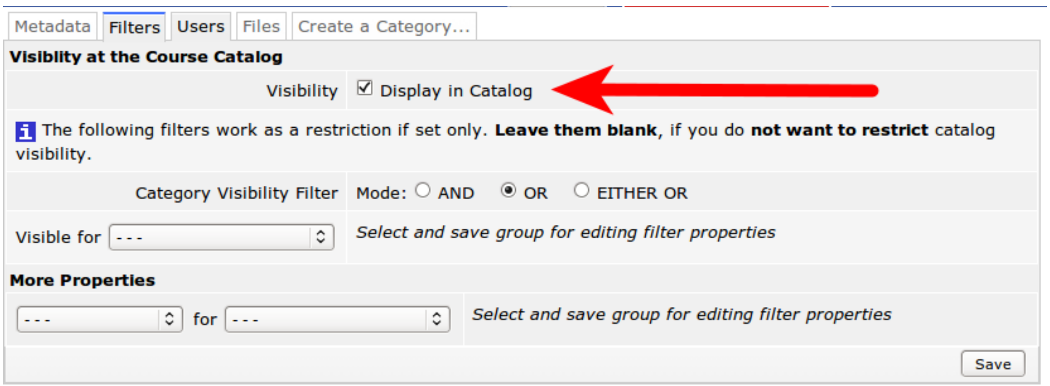


Fig.: To make sure a category is visible for users in the course catalog, check the box *Display in Catalog* on the *filter*-panel.

NOTE: If a category is a subcategory of an invisible category, it will not be displayed in the course catalog even if set to visible. Thus you can hide several categories in the course catalog just by setting a higher leveled category invisible.

On course level you have to check the *Display-in-Catalog*-checkbox *and* make sure, that the course *runtime does not lie in the past*. Otherwise the course will not be visible, even if the checkbox is checked.

7.4.2 Create a new category using a template / copy a category

A node can be copied by using the *template* options. When e. g. creating a new category, choose *Template* > Choose *Current Node* to create a new category on the base of the one you started from.

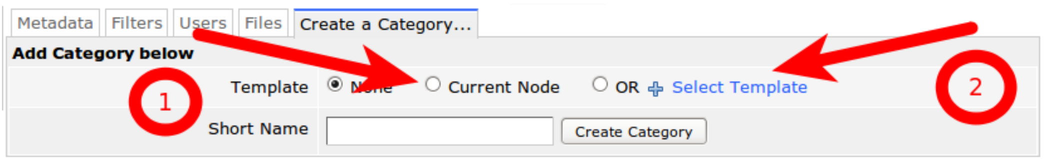


Fig.: The *template* options provide a way to copy *categories* and contained subnodes. Either mark the current category as template (1) or choose any other of the available categories (2).

You can choose any existing category as a template for the newly created one via the *node selector*. All metadata and other panel information (e. g. enrollment information) will be copied to the new category.

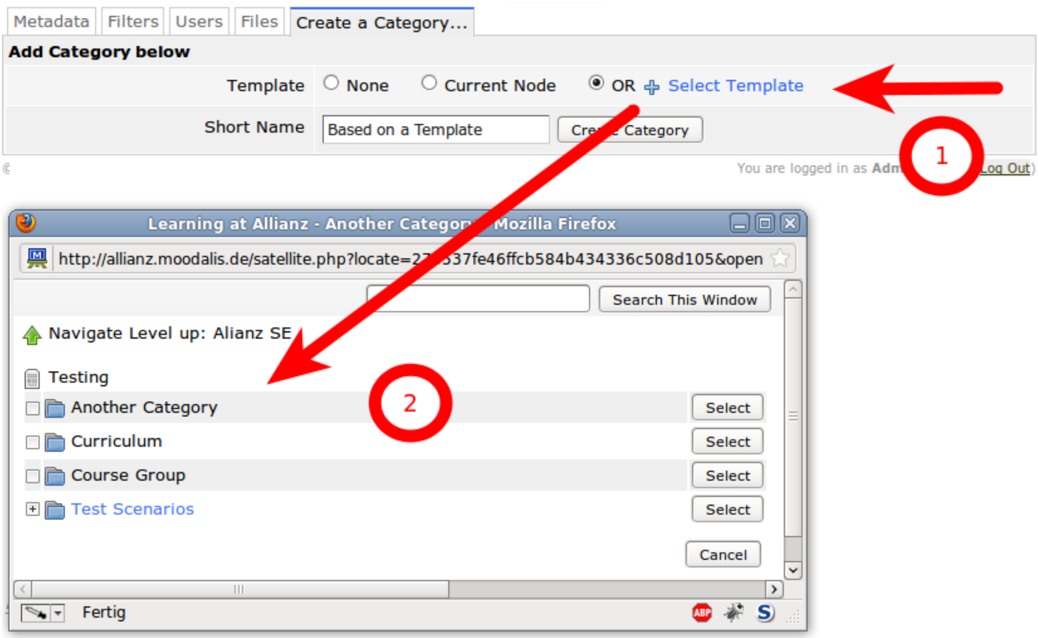


Fig.: Clicking on *Select Template* (1) will bring up the node picker to choose a category (2), which will serve as a template for the new category.

7.4.3 Curriculum

A curriculum is a folder type with some special features:

- You can create a combination of several online and/or classroom training courses, which will be presented as a single learning event in the course catalog
- Users can enroll into all learning events all at once
- In case of online course rooms the link to the course room can be displayed conditionally: If a user has attended/graduated/is certified in course „A“ course „B“ will be accessible, otherwise not.

In the course catalog the curriculum appears as a folder with a separate description and a list of the contained modules. At the bottom of the curriculum area you will find a link to the detailed information page.

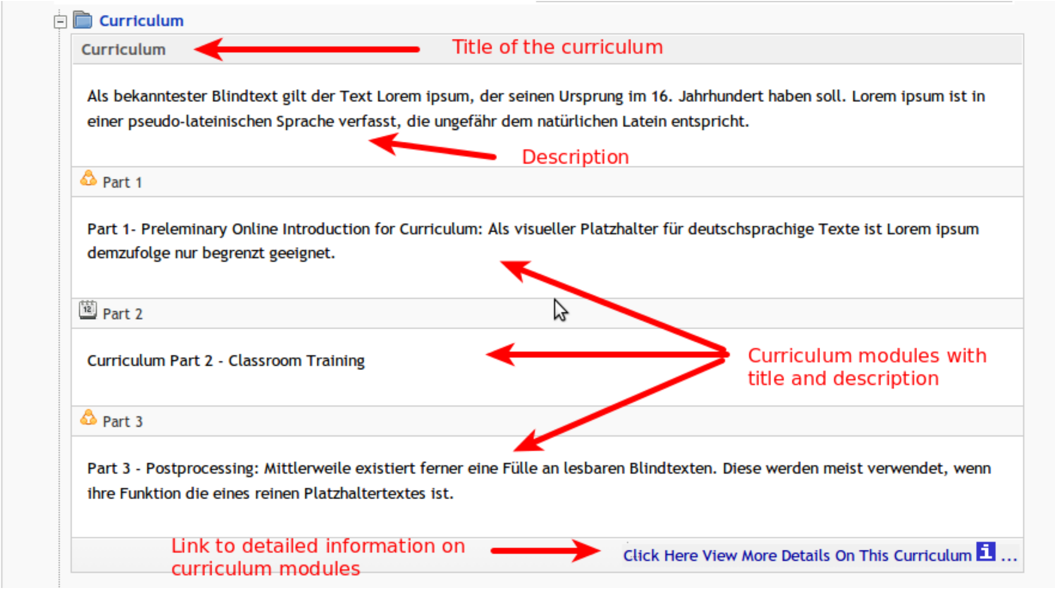


Fig.: Curriculum view in the course catalog

To create a curriculum, create a category (see *7.4 Create a new category*), and set the category's type to curriculum:

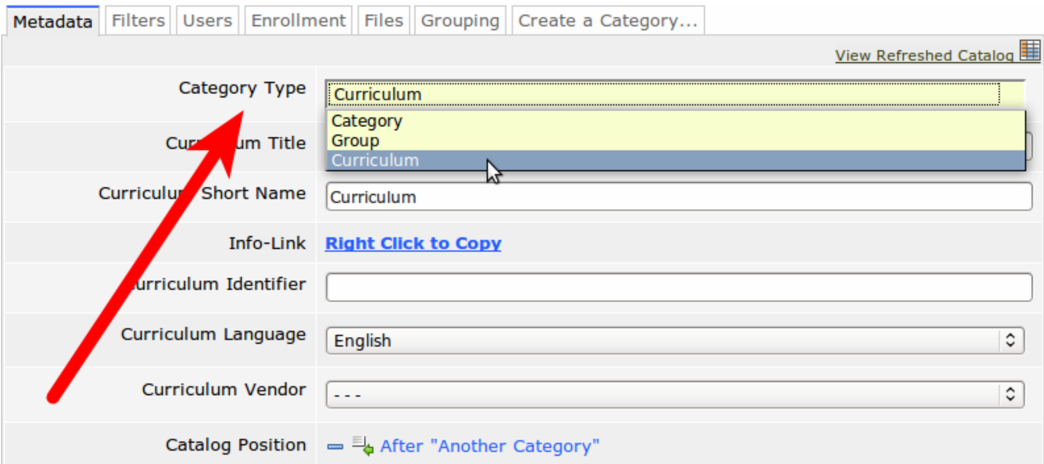


Fig.: Change the category type to create a curriculum

NOTE: If a category already contains subcategories it can not be changed to a curriculum, because a curriculum can only contain online and classroom training courses.

Once you have changed the *Category Type* to *Curriculum*, you will find an additional panel called *Grouping*. The panel contains a table view of all classroom and online trainings that have been created in the curriculum. See *7.5 Create a New Online Course Room or Classroom Training* for more information how to add an entry.

- Use the eye-icons to show/hide a training. If hidden, the training will not be shown in the course catalog and thus not be part of the curriculum. You will see all activated components of the curriculum in the upper part of the table. At the bottom you will see all courses and trainings, which are contained in the curriculum folder but which are currently not activated as part of the curriculum.
- Use the arrow-icons to change the order online and/or classroom training courses will be listed as a group in the course catalog.
- Use the selectbox in the *Mandatory* column to set a status the user has to have achieved to determine a precondition for the next course or training. By default the values *attended*, *graduated* and *certified* are available.

NOTE: By default the settings for the Mandatory columns do not have an impact e. g. on the visiblility or accessibility of the courses. Settings to handle a conditional relation between curriculums modules are a matter of customization and have first to be specified according to the customers need.

A possible setting for online and classroom training courses could look like this:

- Next training is an online course room: Usually the enrolled user can access the course room via link on the MyCourses page (see *4 MyCourses*). In case of a set value such as *certified* the course room link will only be available, if the user has been certified. Otherwise the user will not be able to access the online course room.
- Next training is a classroom training course: If a status is e. g. to certified and the user has not yet achieved a certificate for the preceding course, she will receive a reminder (e. g. „Your classroom training course will start within 3 days. Please visit the preparatory online course room „x“.)

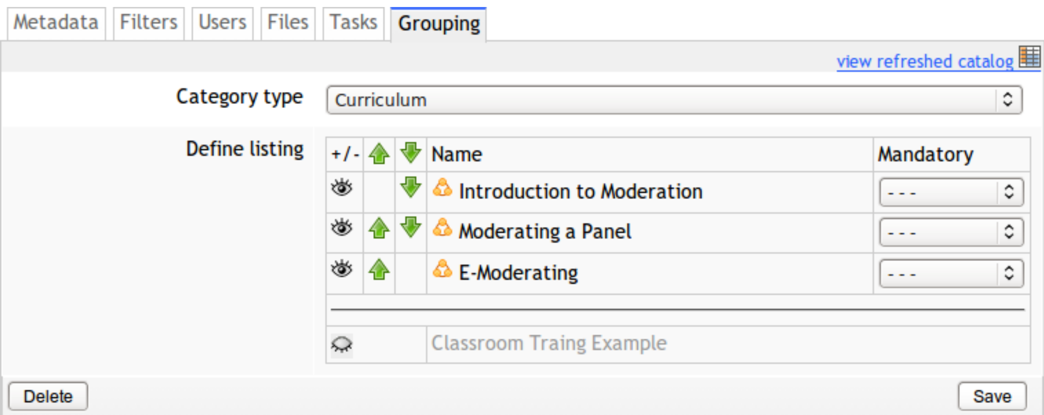


Fig.: *Grouping*-panel at a *curriculum* node. The upper part of the table shows all active and thus in the course catalog visible compontens of the curriculum. At the bottom you can see all courses and trainings which have been created in the curriculum folder but are currently not activated components of the curriculum (here: „Classroom Training Example“).

Field or Widget Label	Description/Details
Category Type	Options: *category*, *group* or *curriculum* (if set to *category* this panel will not be displayed until the type value will be set again to *group* or *curriculum* at the *metadata*-panel)
Define listing	hide or show the list item, modify order (will affect the display in the course catalog)
Mandatory	Set a condition to be fullfilled; standard user status options:
	enrolled = user needs *status enrolled* into current course to be able to enroll to the follow up course
	graduated = user needs *status graduated* into current course to be able to enroll to the follow up course
	certified = user needs *status certified* into current course to be able to enroll to the follow up course

Tab.: Widgets and fields of the grouping-panel for group or curriculum

7.5 Create a New Online Course Room or Classroom Training Course

Beneath a *online training* (icon:) or an *classroom training* course (icon:) folder node you can create new course rooms or classroom training courses on the *metadata*-panel. Leave all settings as provided, insert only a title and click the *create* button.

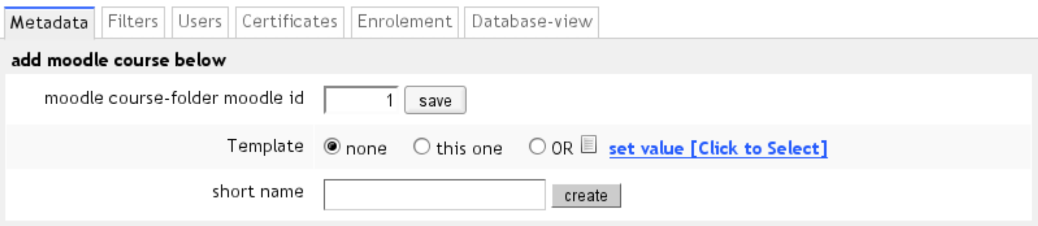


Fig.: On the *metadata*-panel a new online training course can be created

NOTE: In the context of the LPM the *creation of an online training course* means:

A new *database record* with metadata and further course information will be created.

An *empty online training course* room within the *integrated OS-LMS* will be created. This course room can be accessed via the course catalog (or directly from the integrated OS-LMS). In the second step this course room can be populated with content by the course editor.

7.5.1 Visibility of Online and Classroom Training Courses in the Course Catalog

By default a new course or classroom training courses *will not be visible* within the course catalog. Go to the new course's or classroom training courses -panel and check the box *Display in Catalog* to make it visible within the course catalog.

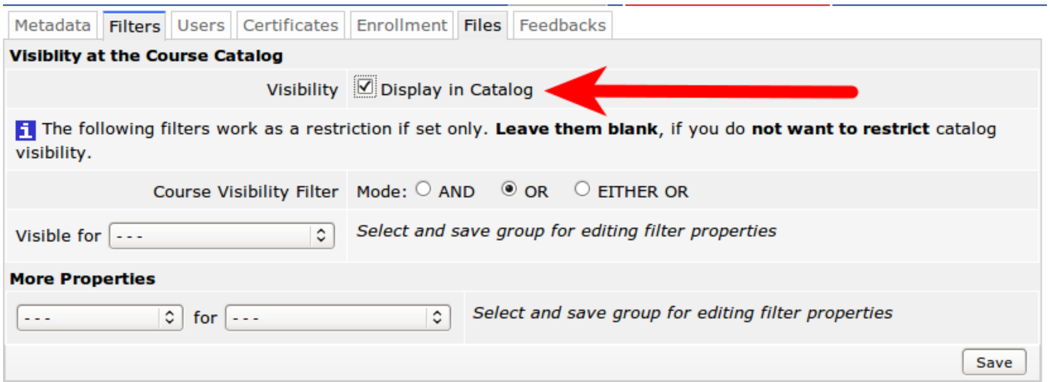


Fig.: To make sure an online or classroom training course is visible for users in the course catalog, check the box *Display in Catalog*.

NOTE: If the course or classroom training course is within an invisible category it will not be displayed in the course catalog even if set to visible. All superordinate categories have to be visible in order to make the course appear in the course catalog.

You have also to check the *Display-in-Catalog*-checkbox *and* make sure, that the course *runtime does not lie in the past*. Otherwise the course will not be visible, even if the checkbox is checked.

7.5.2 Create a Course or Training Using a Template

You can also create a new course

1. on the base of the current node's metadata or
2. choose an already existent node as a template.

This is equivalent to the procedure of copying an online course or classroom training course (see *7.6.2 Copying Categories and Courses*).

NOTE: In the case of an *online course room* copying means:

You *will copy the course entry* in the LPM; on the side of the *integrated OS-LMS* you will have an *empty online course* room created. To copy the content of an online course room you will have to rely on the *integrated OS-LMS* backup functionality (see *http://docs.moodle.org/en/Course_backup*).

To use the current node's data as a base choose the radiobutton *template ... this one* and insert a title resp. *short name*.

To use an existing online training as a template click *set value* to use the *node selector* and choose a course, you want to copy.

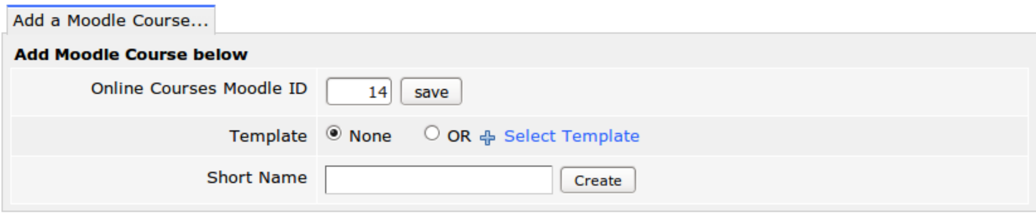


Fig.: Choose the *Select Template* to create a new online or a classroom training course on the base of an existing one (= copy). It will bring up the *node selector* as a popup window.

7.6 Editing of Categories and Courses

To edit a category or course presupposes, that it is currently selected. The current category or course is always highlighted within the tree widget located in the left column of the page (see *project tree*).

7.6.1 Moving of Categories and Courses

To relocate a category or course:

- choose the link close to the label *place* on the *metadata*-panel of the current node.
- You will then get a popup window with the *node selector* (a tree showing all nodes, i. e. servers, categories and events). Navigate through the tree and
- relocate the current category or course either by inserting it as the first child (subordinated:) or as sibling (on the same level:) at the new position.

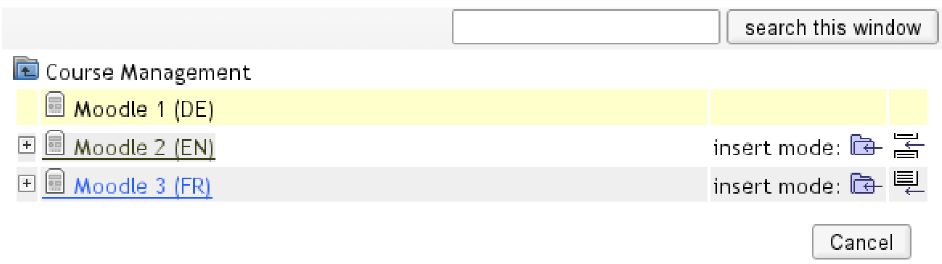


Fig.: Popup window with node selector to relocate the position of a node within the tree.

7.6.2 Copying Categories and Courses

A category or course can be copied by using the *copy function* on a courses *functions*-panel:

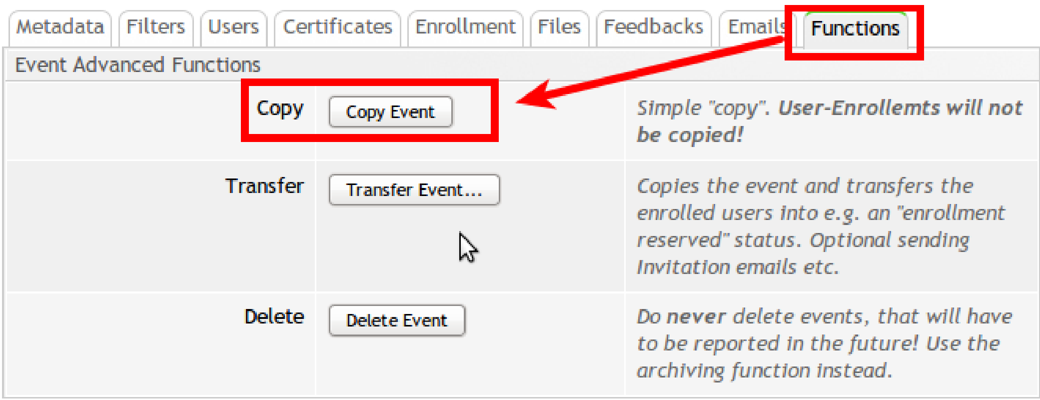


Fig.: *Functions*-panel on course level: *Copy Event*-button

NOTE: If you copy an event (classroom or online training) **you will not copy any existing user enrollements.** This is to say: The *user*-panel of a copied event will be empty. To copy any enrollments use the function *7.6.3 Transferring Events.*

If you copy an online course room you will not copy any course content; to copy the course room's content currently you will have to rely to the implemented backup functionality of the *integrated OS-LMS*, see: *http://docs.moodle.org/en/Course_backup*

To copy an event perform the following steps:

Click on the button *Copy Event* (see fig. above) and fill in a new event title:

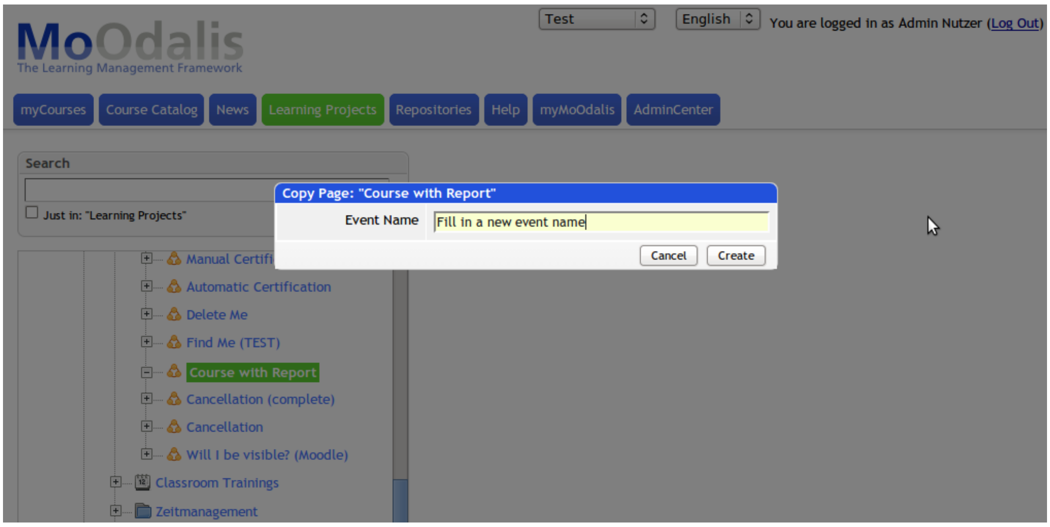


Fig.: Insert a new title for the event copy

Click create to copy create an event copy. The copy will be placed after the copied event. You can relocate the event at any time (see *7.6.1 Moving of Categories and Courses*).

7.6.3 Transferring Events

You can transfer an event including the existing enrollments by using the transfer-function on the *functions*-panel. This may be use in case an event has no free slots and a number of waitlisted attendees. You can can copy the current event while transfering all or a selection of the current enrollments to the newly created event.

To transfer an event follow these steps:

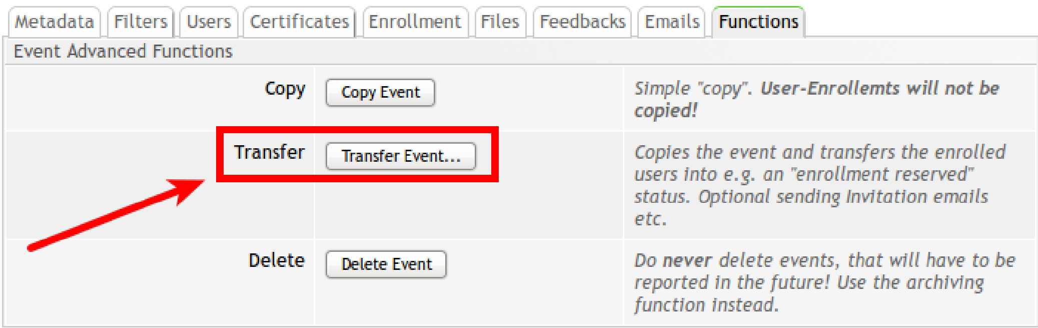


Fig.: Functions-panel on course level: *Transfer Event*-button

Click the Transfer Event-button on the functions-panel of a classroom or online training. You will then see a wizard, guiding you through the neccessary steps.

Step 1:

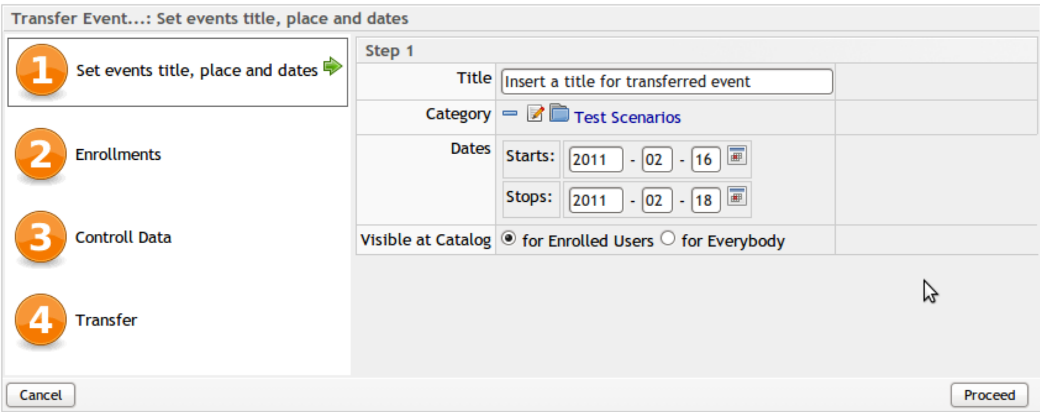


Fig.: Set the a new title, the location, the runtime and visiblility of the event to transfer.

- Set a new title,
- the category, the event should located in,
- the runtime
- and the course catalog visibility

of the new event.

- Click *Proceed* (or *Cancel* to abort)

Step 2:

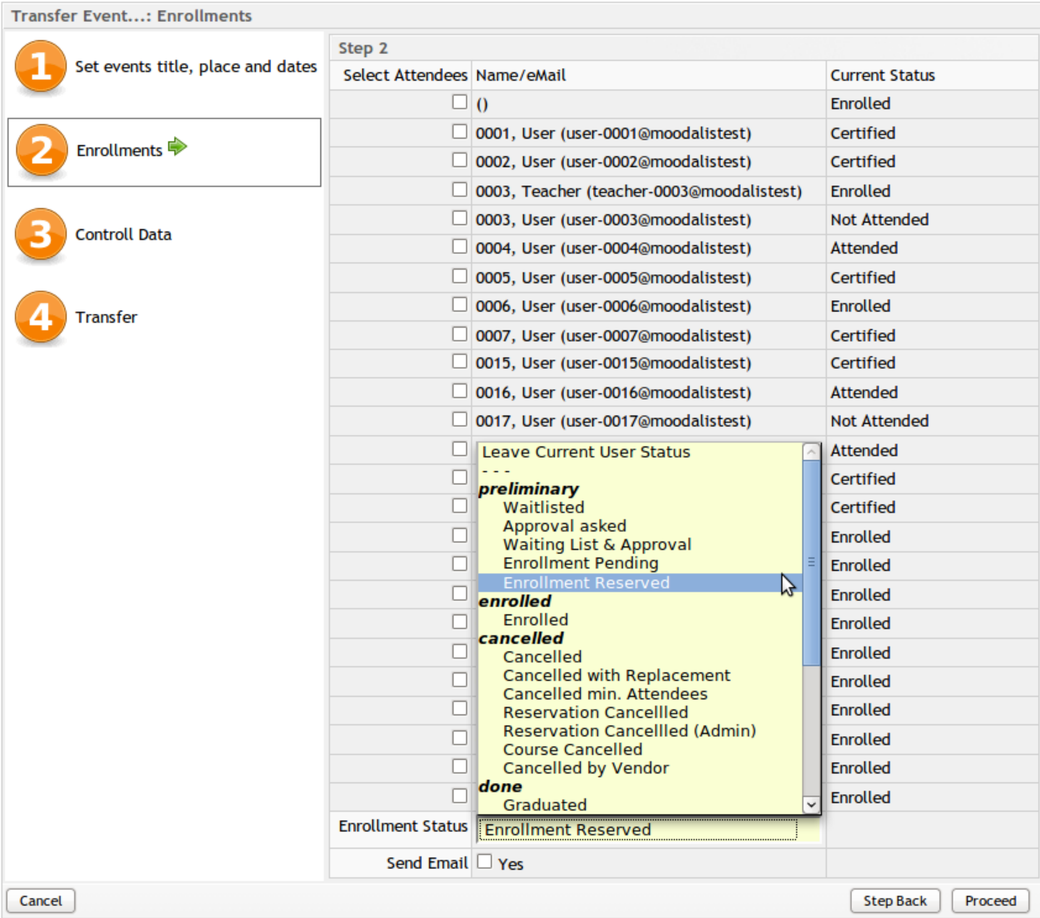


Fig.: Select users and set status for all selected users

- Select the users you would like to have transferred to the new event.
- Set then the initial status for all transferred users
- Click *Proceed* (or *Step Back* or *Cancel* to abort).

Step 3:

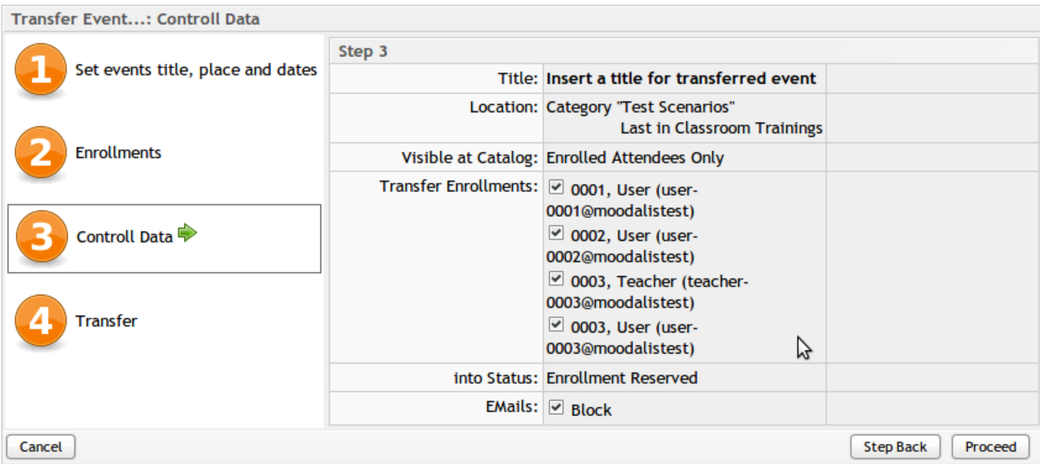


Fig.: Control the data

- Control the data and user selection.
- Click *Proceed* (or *Step Back* or *Cancel* to abort).

Step 4:

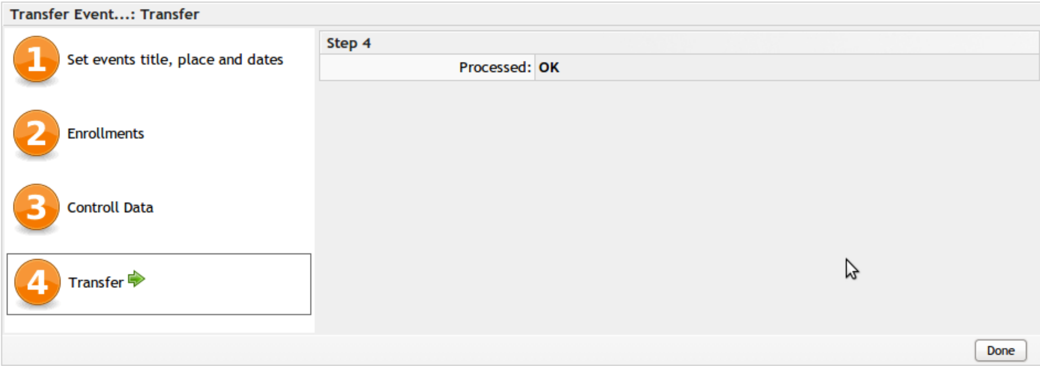


Fig.: The event was successfully transfered if you get the message „OK“.

If everything goes allright you should get an appropriate message.

7.6.4 Deleting Categories or Courses

You can delete a category or event by using the *delete event*-button on the *functions*-panel.

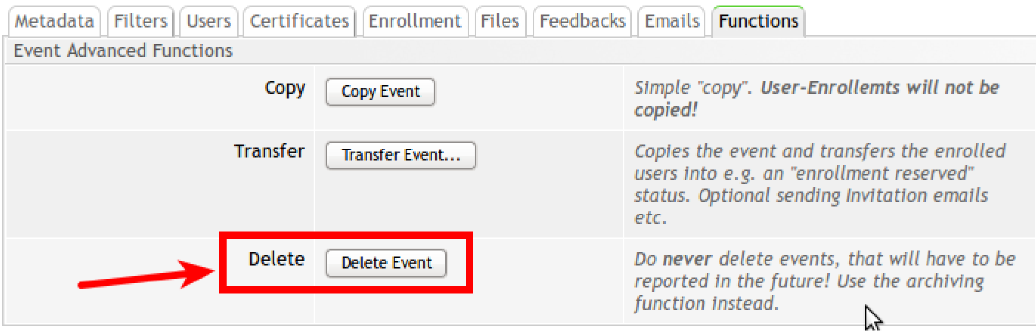


Fig.: Functions-panel on course level: *Delete Event*-button

After pressing the delete-button you will be prompted to confirm the deletion. Make sure, that in case you delete a category you want to delelte all subcategories and contained events as well. Remember also, that deleting an event also means to delete the user's history, if there are any enrolled by the time of deletion

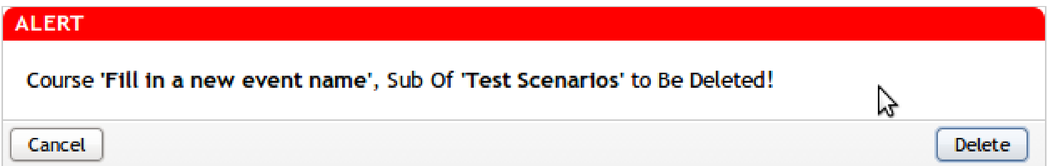


Fig.: Confirm or cancel the deletion

NOTE: In case you delete an event or a category containing events, **all enrollments and other course associated user data will be deleted.** Do not delete any courses, in case you need this data for reporting or other purposes!

In case of an online course room also the course content will be deleted. In most cases it is a better idea to move the category or event to an archive-folder.

7.7 Mapping in the course catalog

It might be the case, that the same categories, online or on site training courses are needed on different levels of the project tree, which is reflected within the course catalog. This is due to the fact that e. g. an online training, which is basically available for a whole business division, will possibly be offered as localised version within different coutries. The same applies to categories:

Example for the mapping of courses and categories:

Business Division A (all countries)

Social Skills

Conflict Management

Business division A (Germany)

Soziale Kompetenz (german version of „Social Skills“)

Konfliktklärung (online course room, german version of the online course „Conflict Mangement“)

Business division A (Turkey)

Social Skills (category „Soft Skills inherited from top node because no translation available or necessary)

Conflict Management (online course room „Conflict Management“ inherited from top node because no translation available or necessary)

This system allows to deliver localised version of categories, courses and events without double or similar entries (such as a category „Social Skills“ besides a localised category „Soziale Kompetenz“ in the german domain). Items can either be inherited from a higher level or will be replaced by a localised equivalent.

7.7.1 Mapping of categories

Categories and their content (e. g. online course rooms) will basically be inherited from higher levels. A category and its content can be inherited and at the same time localised by following these steps:

- Create a new category (see *7.4 Create a new category*)
- Go to the field *category map over* on the *metadata*-panel and fill in the name of the higher level category you want the current category be a representation of

In consequence all content, which is available from the higher level category will be interhited on the new, lower level category. Nevertheless you can create additional online or classroom training courses within this category.

7.7.2 Mapping of courses

Online or classroom training courses will also basically be inherited from higher levels. The mapping works in a similar way to categories:

- Create a new training entry
- Make sure that on the *metadata*-panel the *short name* of the new online or on site training course is the same as the higher level course's/event's *short name*
- Check the checkbox *use shortname mapping* to replace the interhited online or on site training course with the current online or on site training course (which should be a localised version).

7.8 Filter

Filters will be used in three different ways: (1) To filter the course catalog and give special user groups selected view of the course offering. (2) To select certain groups of users for enrollment and (3) Finally filters are used to generate reports with a special view on the data course and user data.

This chapter gives a general overview about filters and explain in some more detail how the can be applied in (1) and (2). You can find more about filters and reports in *12.3 Creating Custom Report Variants*.

Generally filters are based on user properties i. e. data stored in every single user profile. E. g. Users usually belong to a certain

- country,
- client,
- organisational unit,
- department,
- cost centre.

They have certain

- qualification levels or some other

- company internal marking,

helping the Human Resources Department to find out, how they can effectively support employees in continuing education.

Last but not least users might have already successfully attended trainings, they which qualifies them to visit followup-trainings, i. e. by the time they will have a learning history.

Thus filters in Odalis LMS are always working on th base of certain field values form the users profile; in case the user profile contains additional fields (not included in the default user management field set), the filters can be adjusted to use this additional data for filtering puposes.

7.8.1 Course Catalog Filters

In case of the course catalog user properties are linked to category or course properties.

EXAMPLES:

A user is marked as belonging to client „A“, a course is set to be visible only for client „A“.

A user has a qualification called „potential level“ with the value „2“; a course is marked as „being enrollable“ only for users with the „potential level“ „1“ and „2“.

„A“ can only enroll Course „Z“ if she has already attended course „X“. Otherwise she will see the course in the course catalog but the enrollment link will not be available.

To activate a filter three aspects work together: the *filter action*, a *user* resp. *course property* (metadata) and a *defined value* for the property:

Filter Action	What will happen, in case the filter is matches?
visible	Course will be visible in course catalog
recommended	Course will be marked as recommended in the course catalog
compulsory	Course will be marked as compulsory in the course catalog
enrollable	Enrollment link will be available on the detailed course information page

Tab.: Default filter actions

Property	Possible Values
Organisational Unit	Pregiven value lists of ID-Numbers or other differently marked organisational entities
Cost Center	Pregiven value lists of ID-Numbers or other differently marked cost centres
Company	Pregiven value list of company names
Client	Pregiven value lists of domain names or other differently marked clients
Personal Level	Pregiven value list

Potential Level	Pregiven value list
Prerequisits Attended	Any course which has to be attended by a user to match the filter
Prerequisits Graduated	Any course which has to be graduated by a user to match the filter
Prerequisits Certified	Any course which has to be certified by a user to match the filter

Tab.: Default user resp. course properties

7.8.2 Setting up a Course Catalog Filter

7.8.2.1 Simple Visibility

The most basic filter is the visibility switch to contol whether a course can be seen in the course catalog or not:

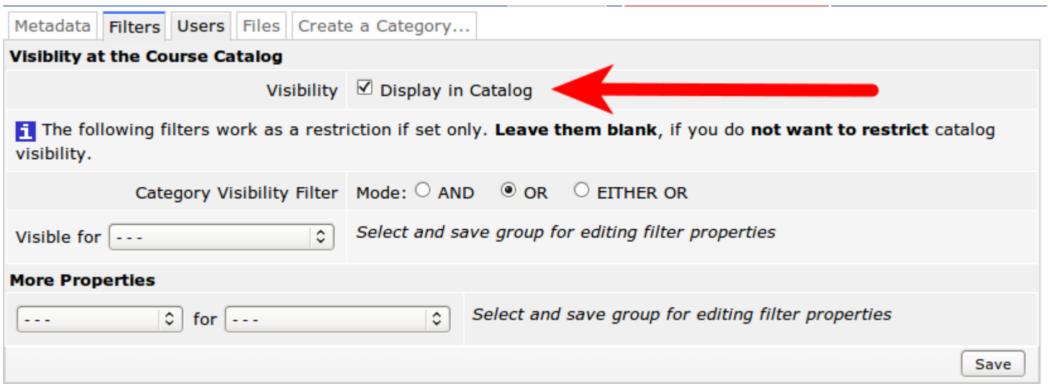


Fig.: Check the box Display in Catalog to make a category or course visible in the course catalog.

NOTE: By default categories and courses are invisible; if you have created a category or course and would like it to publish make sure to check the visibility-box; if the course is still not visible, check if every category and subcategory which contains the course is visible as well.

7.8.2.2 Conditional Visibilty

There is also a visibility option available, which is dependant on certain user properties e. g. the company or the departement the user is belonging to:

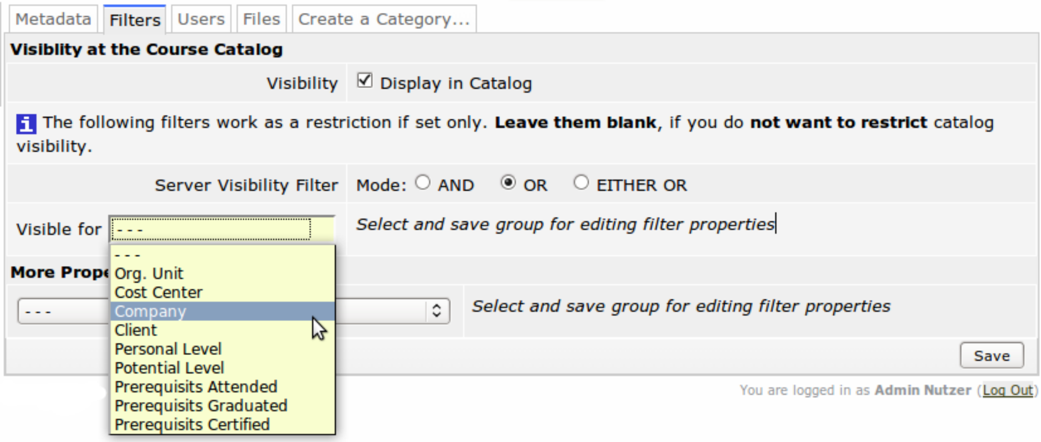


Fig.: Use a conditional option to control the visibibilty according to certain user properties. Choose e. g. the property company to ...

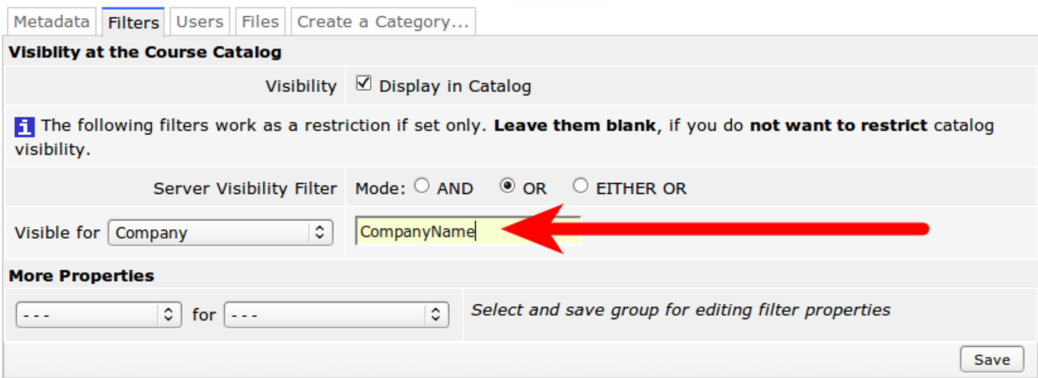


Fig.: ... get either a text field or a selection of valid company names. If a users profile contains the vaule „ComanyName“ is her profile, the course or category will be visible for her.

7.8.2.3 Additional Filters

By default there are three more filter actions available in case the user matches a certain property:

- mark a course as recommended (recommended)
- mark a course as compulsory (compulsory)
- display an enrollment link (enrollable)

NOTE: The actual field values of the cropdowns of this panel my vary according to the nature and level of customization. The examples included in this manual are based on the standard functionality of Odalis LMS.

The steps to set one of the described filters are the following; the actual field vaul:

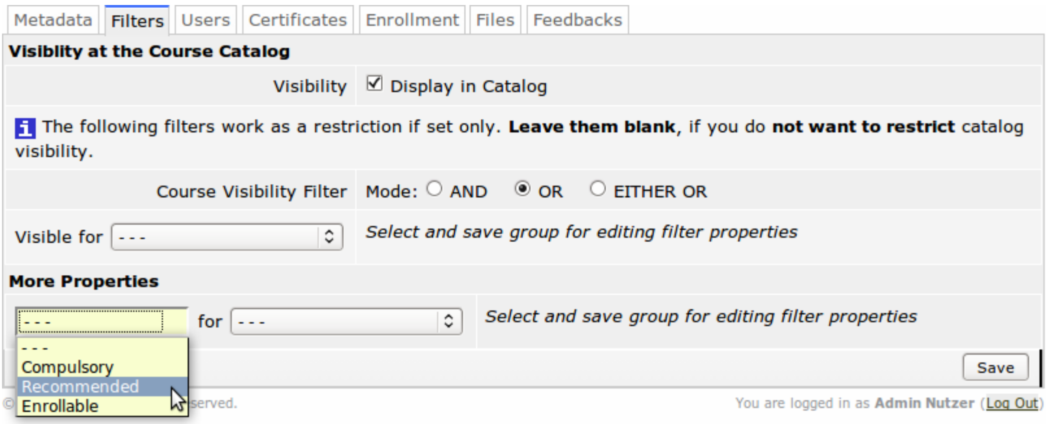


Fig.: Set the filter action *recommended* e. g. for users with a certain qualification level.

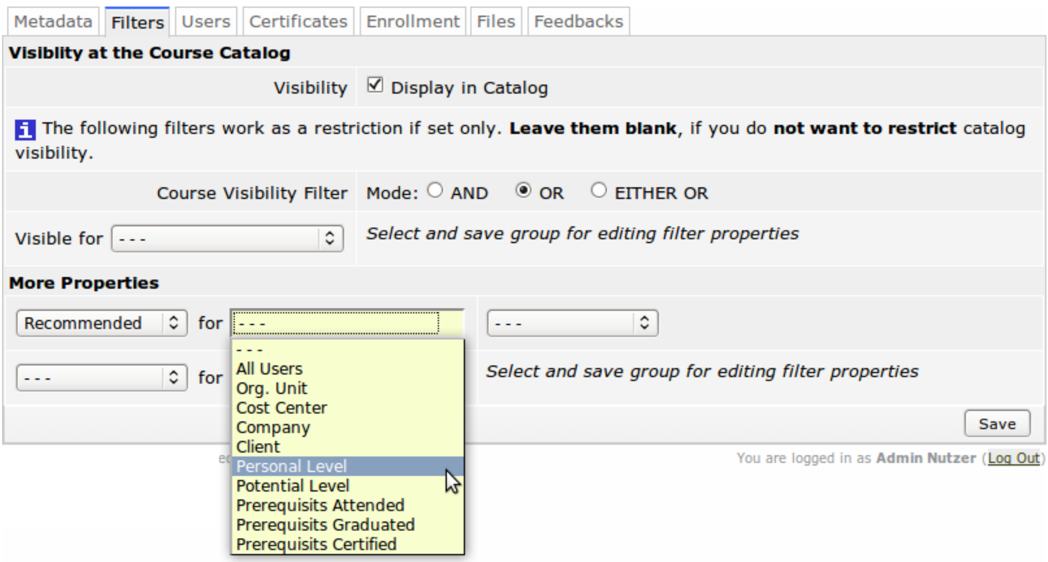


Fig.: Choose a user property e. g. the *personal level* e. g. for users with a certain qualification level. The customized version of this filter might present different options.

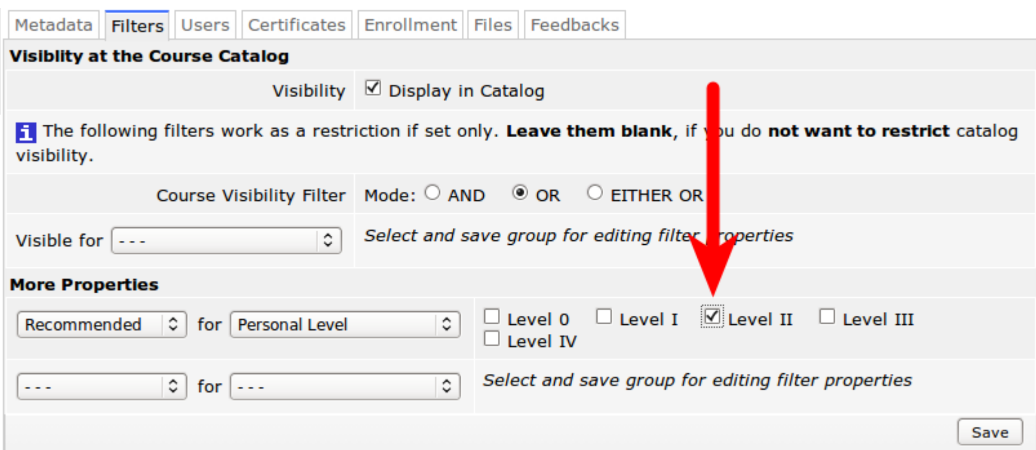


Fig.: Choose a field value from the presented list (checkboxes, select lists or other according to filter customization)

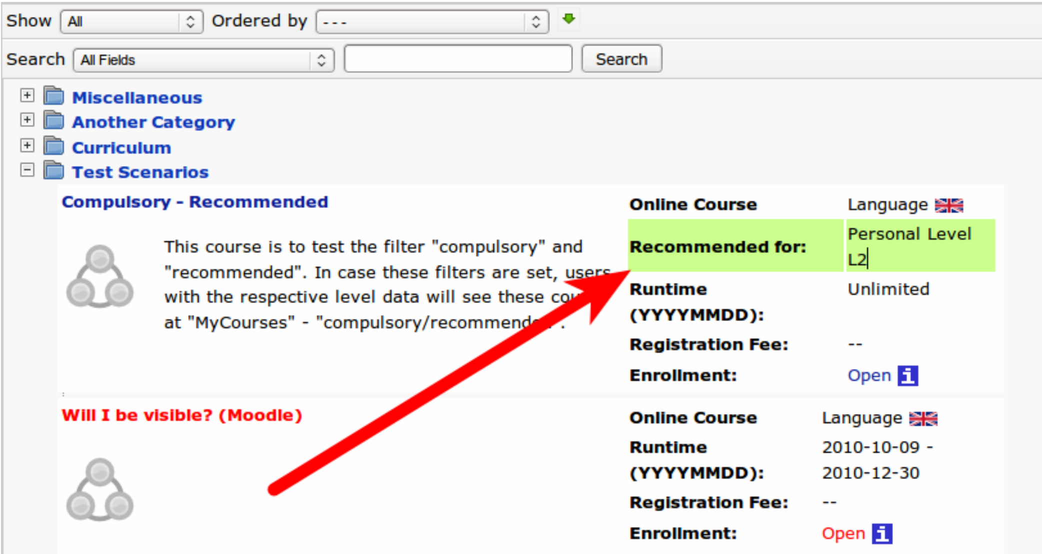


Fig.: For users with the value „Level II“ the course with the respective value will be marked in the course catalog

7.9 Nodes and panels in the LPM

Every node in the learning project management (see also *project tree*) has a corresponding view within the content area. The content area contains a set of panels providing forms and control elements. The panels can be navigated by clicking the tabs labeled according to the field group (e. g. *certificates*).

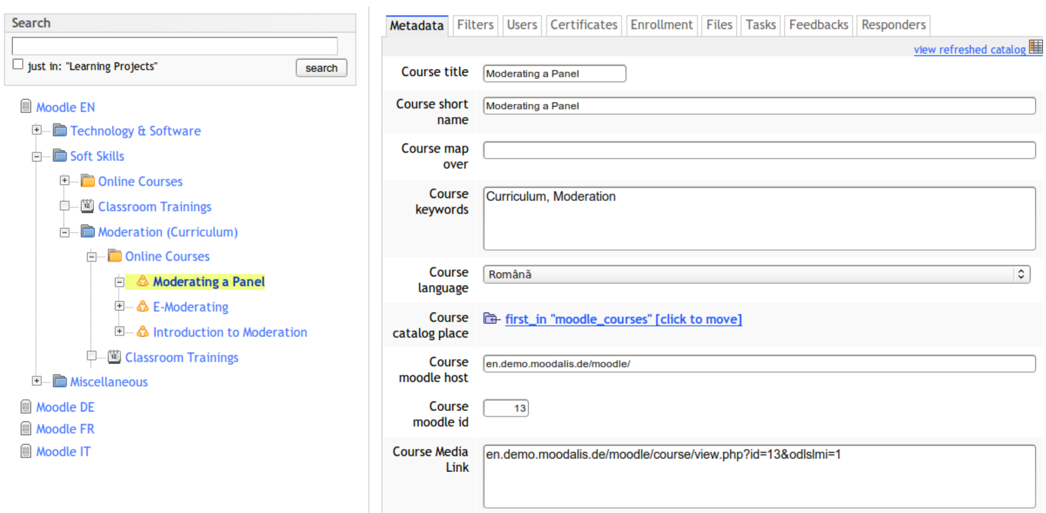


Fig.: Example for complete project tree on the left side and *metadata*-panel for the active online course room node on the right side in the content area.

The following table provides an overview of panels and the types of nodes, the panel might contain; all panels can be customized according to specific needs within a certain range.

NOTE: As panels at different node types may in some cases be identical, this specification will descibe the panels once and include a reference where appropriate to avoid redundancy. Thus, e. g. the *users* panel will be described in detail in chapter *7.9.4 Panels: Online Course Room.*

Panel Label	Node Type	Gereral Description of Fields
metadata	all nodes	e. g. title and descriptions; according to node type the labels/fields vary.
filter	all nodes	if filter data is being provided preconfigured filters work in an appropriate way (e. g. to control visibility of categories in certain domains within the course catalog)
users	category, online or on site training courses	enrollment and gradation of users, assignement of tutors etc.
certificates	category, online or on site training courses	associate preconfigured certificate templates to courses/events; sent certificates to users, who have completed the online or on site training course
enrollment	category, online or on site training courses	enrollment conditions and accounting information
files	all nodes	repository for the current node; in the case of an online course room node the repository is a representation of the online course room's data folder
tasks	online or on site training courses	task management tool for the current course
feedbacks	online or on site training courses	management of feedbacks for the current course
responders	online or on site training courses	custom responders overriding the system-wide responders

Tab.: Overview of panels and nodes in the LPM.

7.9.1 Clients

Client- or domain nodes can host categories containing the learning offerings to be available for countries, business devisions or other organizational entities. Server nodes will usually be created within the process of the basic system setup. They provide the basic skeleton, which mirrors the organization's 1st and 2nd level structure (i. e. server nodes representing countries or/and domains).

7.9.2 Panels: Category

A *category* or *curriculum* (see *7.4.3 Curriculum* for details) node provides a way to structure and combine online and classroom training courses as well as to present these in the course catalog. Additionally role assignments for teachers or course creators can be done on a category level (*users*-panel). The teacher or course creator will acquire the role for all courses and trainings within the category.

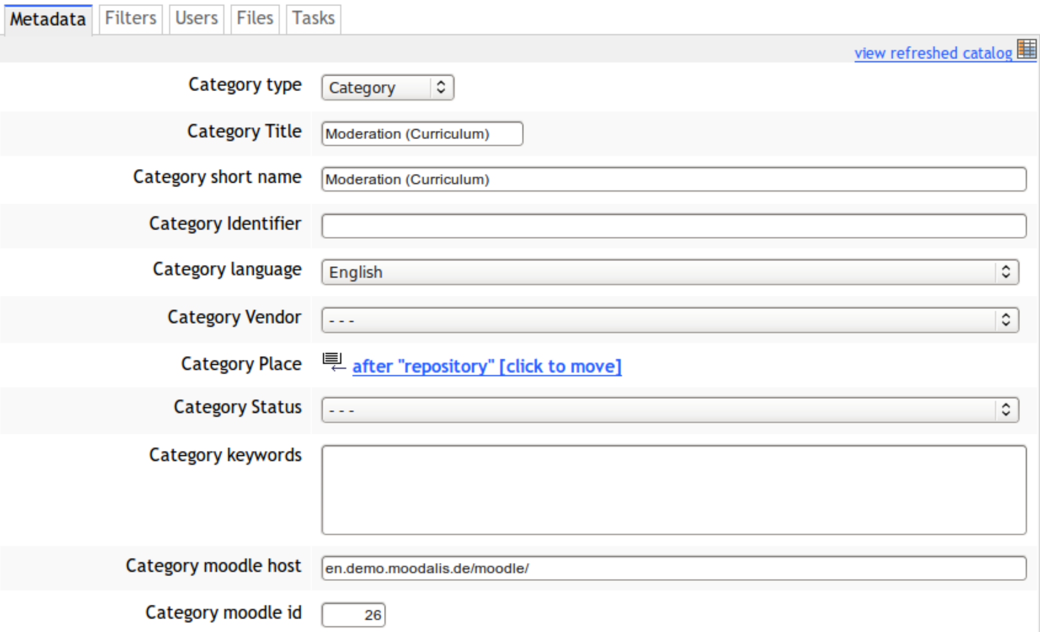


Fig.: Category, group or curriculum of learning offerings *metadata*-panel; additional panels at this node are: *filters*, *users*, *files* and *tasks*

The category node will by default contain the following panels:

7.9.2.1 Metadata

Field or Widget Label	Description/Details
Type	Available options for category type: • category • *group* • *curriculum*
Title	title
Short Name	short name
Identifier	internal identifier
Language	information as displayed in the course catalog
Vendor	vendor
Place	venue
Status	Available options: • pending • confirmed • course cancelled • cancelled vendor • cancelled min attendees • archived
Keywords	keywords e. g. for search
Link to Online Course Room	link to *integrated OS-LMS*

Map Over	category entry will be replaced within course catalog with given value
Intended Audience	target groups
Goals	objectives
Short Description	short description
Other Annotations	additional annotations
catalog Image	catalog image
Add category below	
Template	template to use for creation of new category
Short Name	

Table: Fields of metadata-panel for category, group or curriculum

7.9.2.2 Filters

See *7.9.4.2 Filters*

7.9.2.3 Users

See *7.9.4.3 Users*

7.9.2.4 Files

See *7.9.4.6 Files*

7.9.2.5 Tasks

See *7.9.4.7 Tasks*

7.9.2.6 Grouping (Curriculum)

See *7.4.3 Curriculum*

7.9.3 Panels: Online Training Course Folder

The *online training* folder is a *virtual* folder to collect all online training courses within a category. It will *not appear* as an entry in the course catalog.

7.9.3.1 Metadata

The *metadata*-panel on the online training folder node allows to create new online training course rooms.

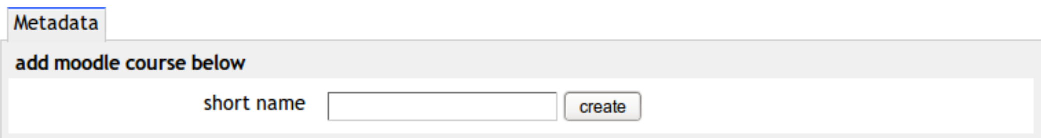


Fig.: Online training folder has only a *metadata*-panel to create new online course rooms.

7.9.4 Panels: Online Course Room

An online course room node contains all relevant data for a single online training course room.

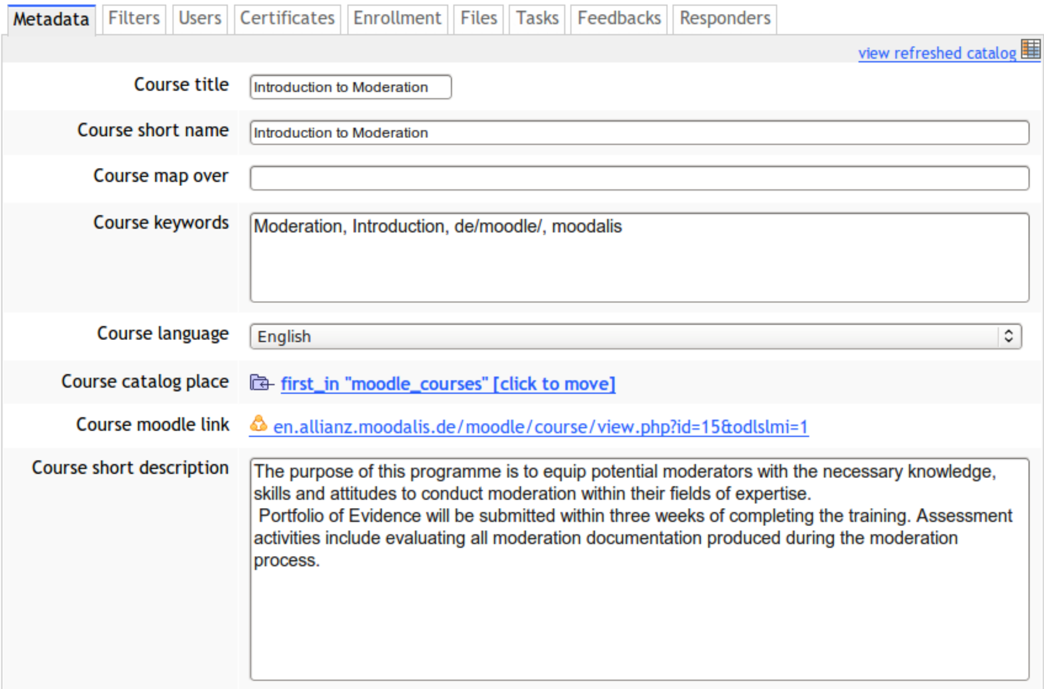


Fig.: Online course room with *metadata*-panel; additional panels available at this node are: *filters*, *users*, *certificates*, *enrollement*, *files*, *tasks*, *feedbacks* and *responders*.

An online course room node will by default contain the following panels:

7.9.4.1 Metadata

Field or Widget Label	Description/Details
Title	title
Short Name	short name
Map Over	Show current course in the course catalog instead of the course name entered into this field
Keywords	keywords e. g. for search
Language	information as displayed in the course catalog
catalog Place	Position of the course (e. g. category)
integrated OS-LMS Link	Link to online course room in the *integrated OS-LMS*
Short Description	Short description
Contact	Name and/or institution
Contact Email	Email adress
catalog Image	catalog image
Study Time	Supposed amount of time to work through the course
Feedback	Show or hide link to feedback form in course single view after

	attending the course

Tab.: Widgets and fields and metadata-panel for an online course room

7.9.4.2 Filters

There are three standard filters available e. g. departement, level, job function or any other custom field from the user account management. Thus, the *filter*-panel might look like at the following screenshot:

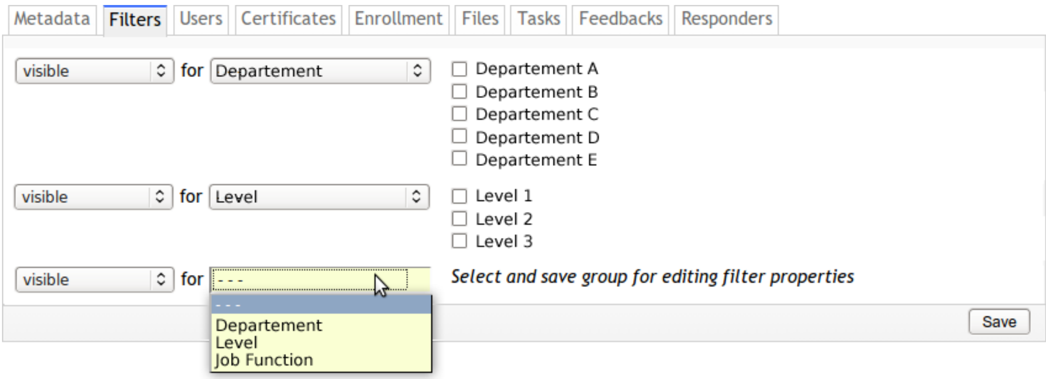


Fig.: Example for *filter*-panel; the current node can e. f. set to be visible only for certain „departements“, „levels“ or „job functions“.

Field or Widget Label	Description/Details
1st select box	„Mode“ with the following options available:
	visible: in course catalog and/or myCourses-area
	recommended, i. e. course will be displayed, if user selects „recommended“ within course catalog and/or myCourses-area)
	compulsory, i. e. course will be displayed, if user selects „compulsory“ within course catalog and/or myCourses-area)
2nd select box	„criteria“: any field from a user account such as „Departement“, „Level“ or „Job Function“
Checkboxes or multiple select	Value list according to selected criteria

Tab.: Possible setup of filter-panel for different nodes (category, group, curriculum, online training course room and/or classroom training course node)

7.9.4.3 Users

The *users*-panel basically allows to accomplish the follwing tasks:

- search for individuals with different search criteria (e. g. name, organizational unit or any other field of a user record)
- add users to the course room as e. g. learner, teacher or course editor
- modify a user's status with respect to the current course (e. g. set a learner to *certified* or a teacher to *active*)
- see the current status and the status history of a user

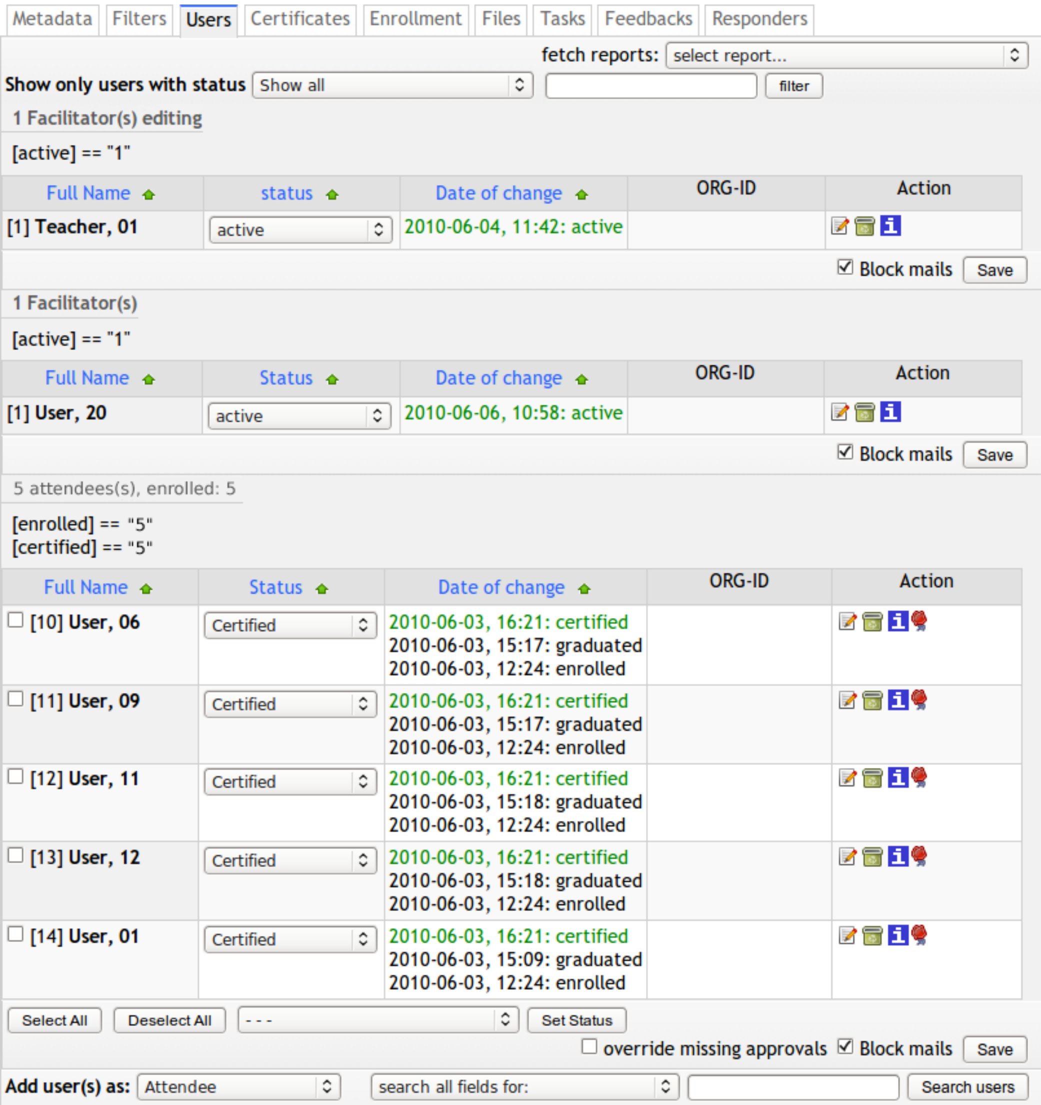


Fig.: *Users*-panel with several users *certified* to the course room as well as *active* teachers.

The *users*-panel contains the following widgets and features by standard:

7.9.4.3.1 Report Selector

In the upper area the *users*-panel contains a selector for quick access to predefined reports. The data source basis is the current node level (e. g. a course room or a category).

Fig.: Report Selector

7.9.4.3.2 On Panel Search Facility

A search facility for users already enrolled or in any other way connected to the course (e. g. teachers) can be found in the upper area of the panel.

The select box provides a list of statuses the users on the panel can be filtered with (for a detailed explanation and complete list of statuses see *7.10.1 User Statuses*).

Finally a textfield allows to filter the panel according to any token provided by the user account data (e. g. *name, email adresse* or *organisational id*).

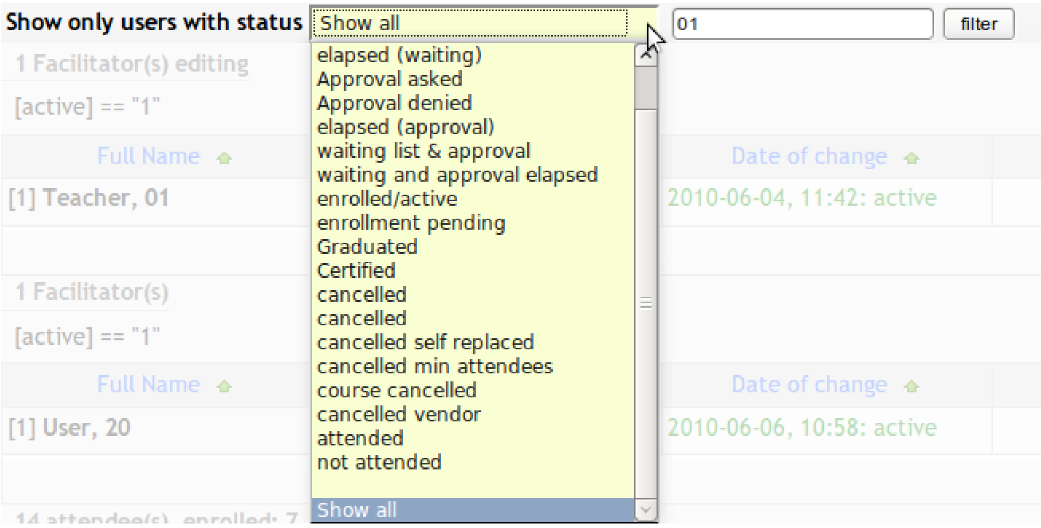


Fig.: Panel search facility for users/teachers already enrolled/active.

7.9.4.3.3 Add-User-Functionality

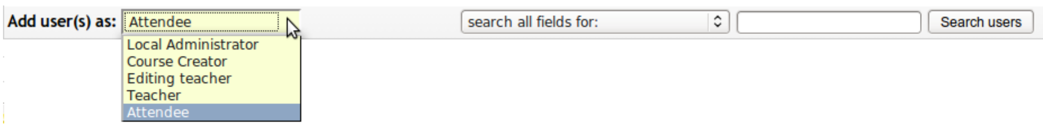


Fig.: Add-user-as-select-box.

User can be added to the panel with a specific role (e. g. *as attendee*). The select box in the bottom area of the *users*-panel lists will contain all available roles at this level, which are in the standard implementation:

- Local Administrator
- Course Creator
- Editing Teacher
- Teacher
- Attendee

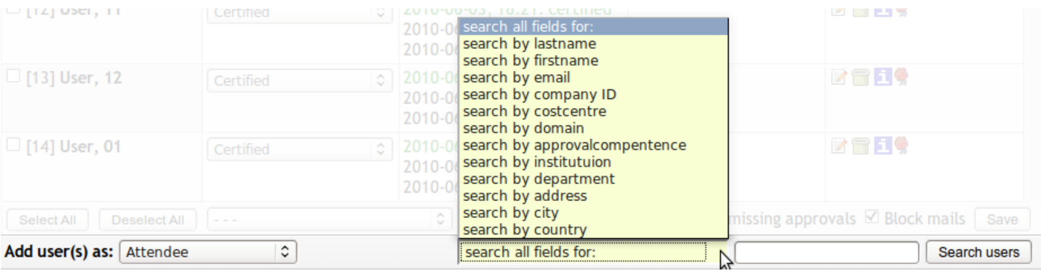


Fig.: Search critiera to identify a single or a specific set of users.

In combination with a select box a text field provides a search functionality to search for users according to specific criteria; you can start a fulltext search or search for specific token characterizing a user or a group of users (e. g. *departement*).

In case of a match the eligible users will be shown at the bottom and can be marked to be added to the online course or classroom training course. Thereby a status can be set (e. g. *approval asked* or *enrolled*).

The checkbox *block emails* allows to temporarily deactivate the automatic email responders (see *14.1.1 Responders* for a detailed description of responder-functionality).

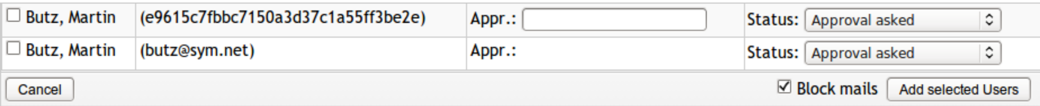


Fig.: Users identified by the search to be added to the course room.

Once the users have been added to the course room they will be listed on the panel grouped according to role. The listing contains status information and functions.

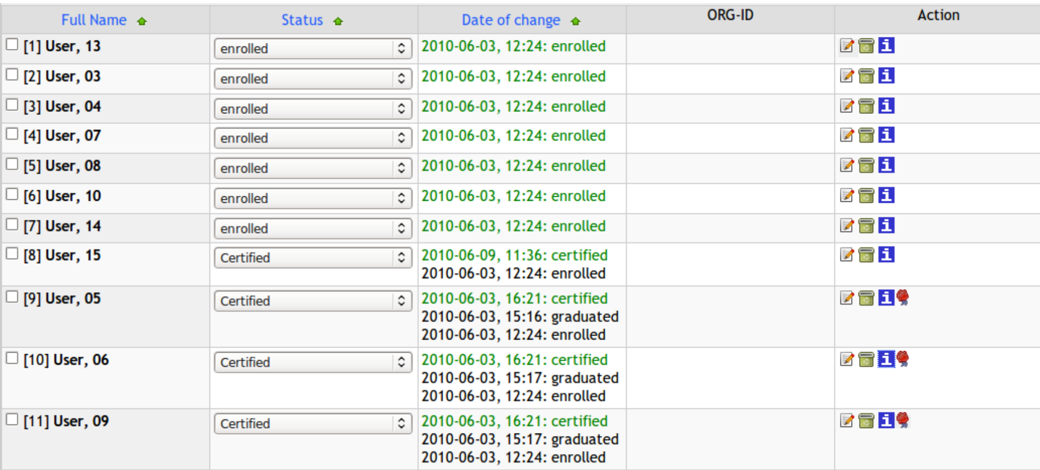


Fig.: Added users with current status, status history and adminstrative functions

Column Title or Widget Label	**Description/Details**
Full Name	title
Status	Status selector shows current status and allows to change the status
Date of change	Listing of all status changes with data of change
ORG-ID	Fields to display on the *users*-panel can be customized by vendor
Action	Possible actions with respect to the user
	 = go to the user account of *integrated OS-LMS* user management

	= delete the user from panel (does not touch the user account but only the user's status history with respect to the current node)
	= shows the user's status history in a popup window
	= Link to the user's certificate

A click on the blue info icon shows the user's status history in the popup window:

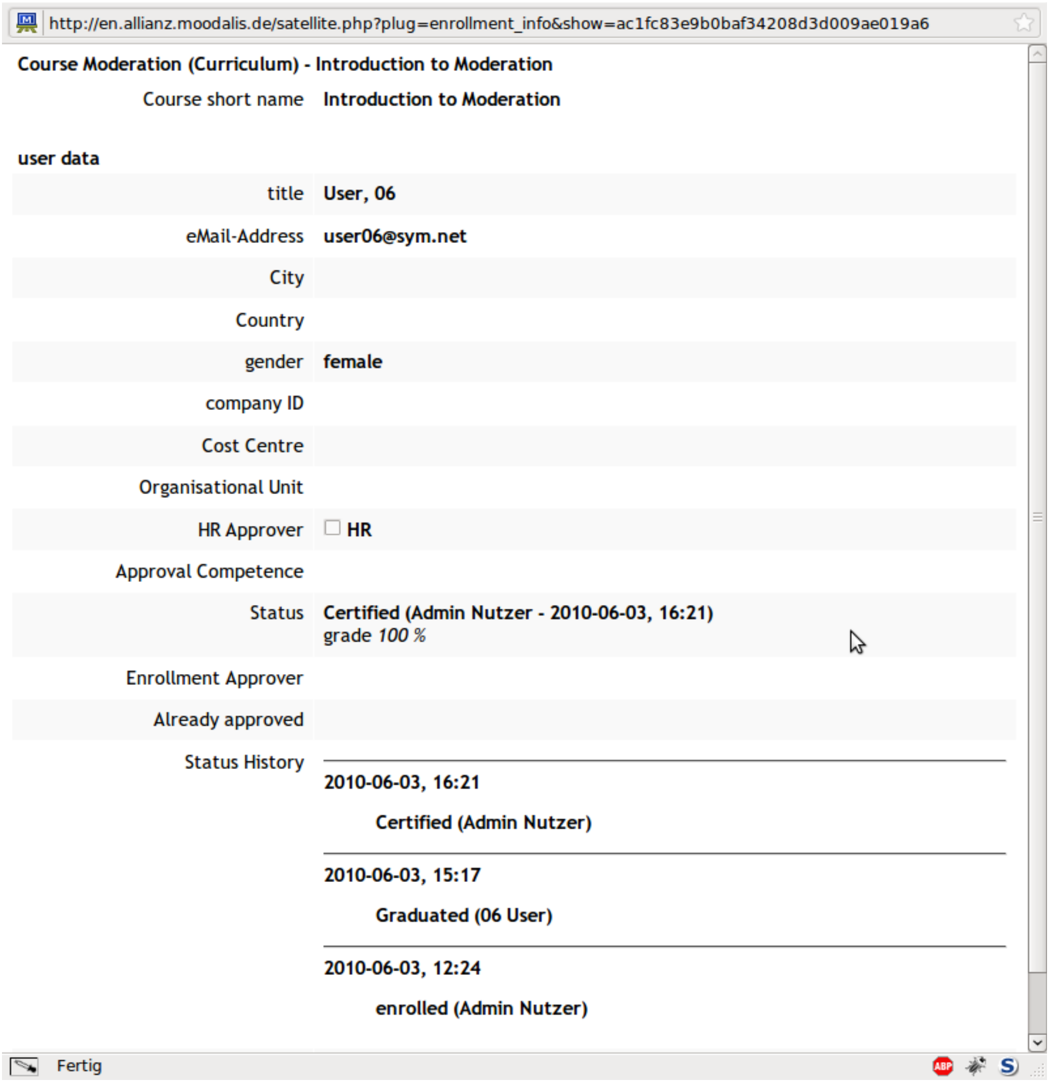


Fig.: The info function shows the users history with respect to the current course.

Finally the toolbar in the bottom area contains functions for bulk actions to setup the status of the selected users listed on the panel. Thereby a checkbox allows to override missing approvals (see 7.10.2 Approval Process) and to temporarily deactivate the automatic email responders (see 14.1.1 Responders).

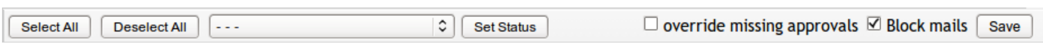


Fig.: Toolbar for bulk status' changes of the listed users and to save the panel as a whole.

7.9.4.4 Certificates

The *certificates*-panel allows to select certificate templates and assign these to the current online course or classroom training course. Furthermore users can be certified and certificates can be distributed manually or automatically.

The *certificates*-panel is splitted up into 4 areas:

7.9.4.4.1 Certificate selection

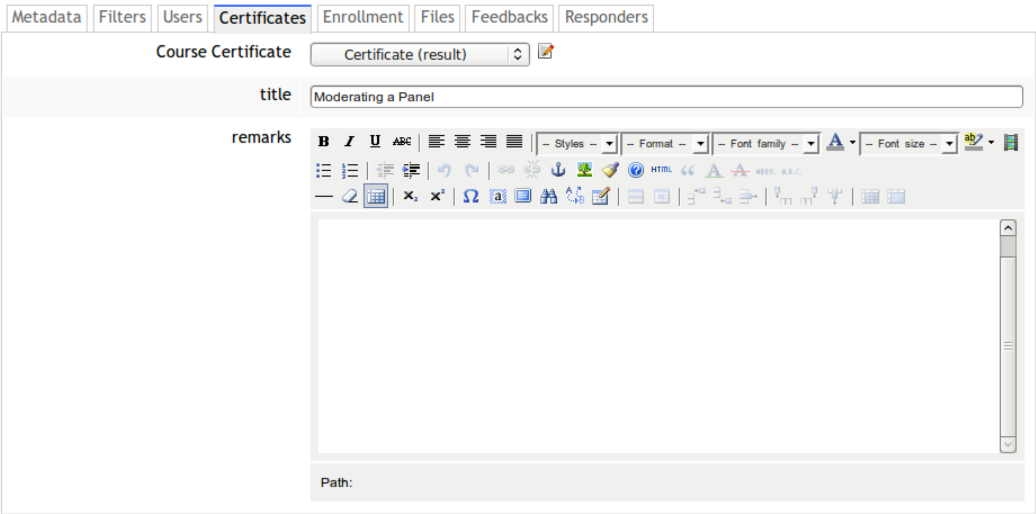


Fig.: Top area of *certificates*-panel: selection and optional remark

Field or Widget Label	Description/Details
Certificate	Selection from available certificate templates
Title	Title of the certificate (will get printed in case certificate contains the appropriate placeholder)
Remarks	Allows to add a remark to the certificate on a coursewise level

7.9.4.4.2 Selfgrading

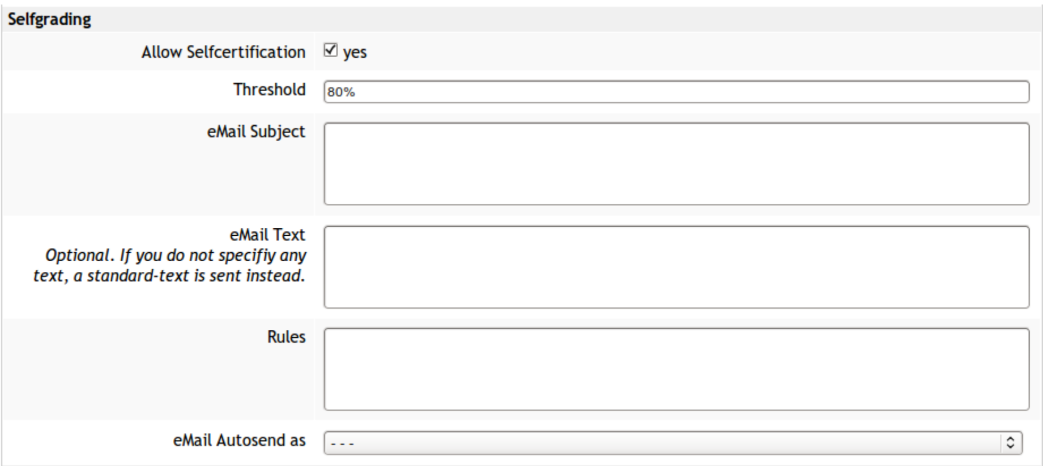


Fig.: Section *Selfgrading* of the *certificates*-panel

Field or Widget Label	**Description/Details**
Allow Selfcertification	Allow user to trigger completion of course; will get certified if appropriate result has been achieved
Passing Score	Min. result, that has to be achieved to be able to become certified
Email Text	Custom email text to be sent to the participant in case of automatic certification
Rules	Expert conditions for certification
Email Autosend as	Options for distribution of certificates: • *Email with link to PDF*, • *Email attachement*, • *Print*

7.9.4.4.3 Manual Certification

In case of manual certification the following fields will be applied:

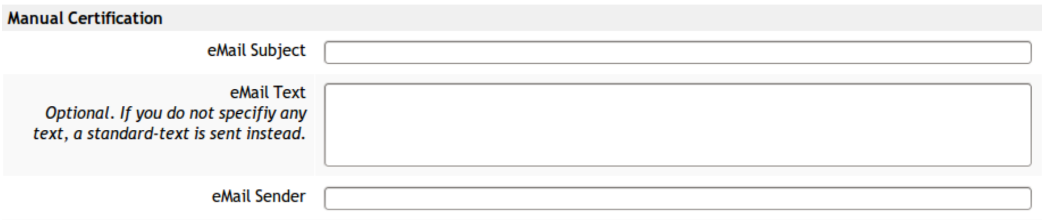


Fig.: Section *Manual Certification* of *certificates*-panel

Field or Widget Label	**Description/Details**
Email Subject	Email subject in case of manual certification
Email Text	Email text in case of manual certification
Email Sender	Email sender address in case of manual certification

7.9.4.4.4 Graduated Students

Students, who have the status *graduated* will appear on the courses *certificates*-panel and are entitled and – from system perspective – *prepared* to get a certificate.

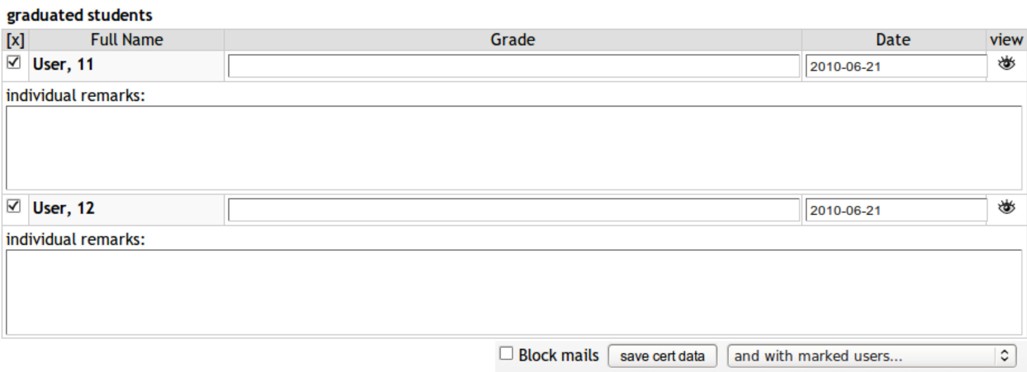


Fig.: Section *Graduated Students* on the *certificates*-panel; this area displays all students which have the current status *graded* meaning these stundents can become *certified*.

Field or Widget Label	Description/Details
Checkbox [user name]	if checked user will be selected for bulk action (see select box at the bottom)
Grade	Optional entry for grade
Date	date of gradation
Individual Remarks	Optional individual remark printed to the certificate (if template contains appropriate placeholder)
Block Emails	No emails will be sent on bulk action trigger
Save Cert Data	
and with marked users ...	bulk action for all checked users; available options: • *certify marked users*: users will be certified, no distribution of certificates, only email with notification • *certify marked users email linked*: users will be certified, distribution of certificates per link in email • *certify marked users email attached*: users will be certified, distribution of certificates per attachement in email

7.9.4.5 Enrollments

The *enrollment*-panel provides all information controlling the conditions of the enrollment process.

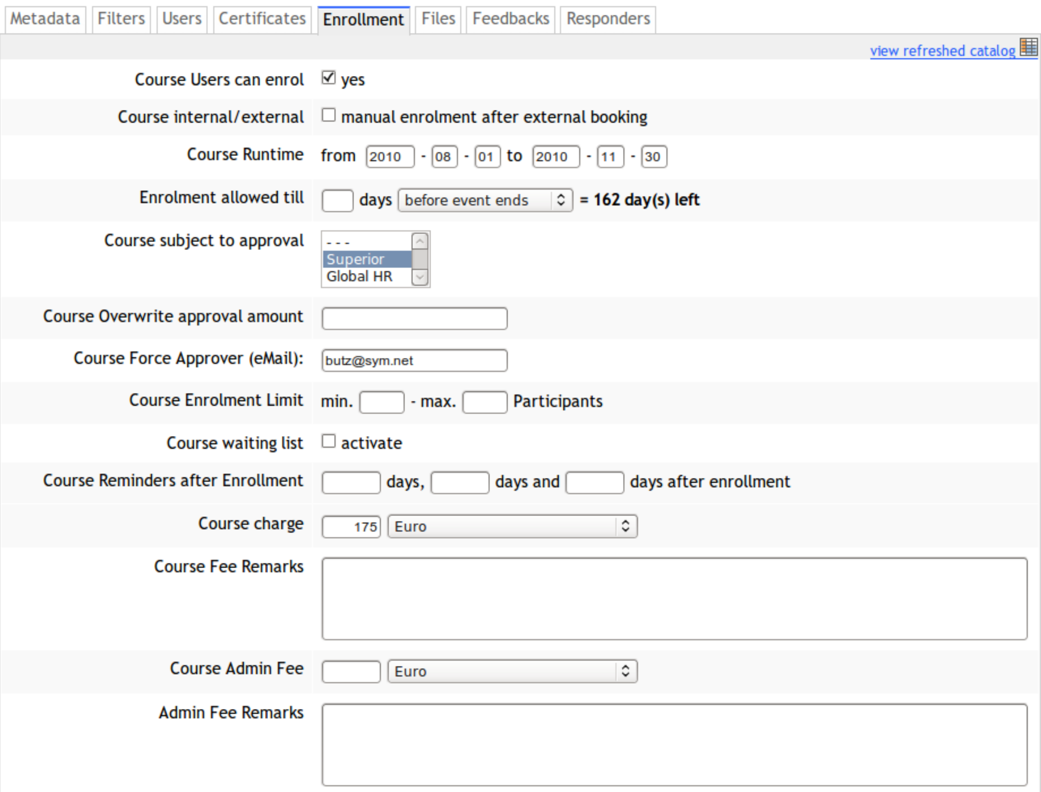


Fig.: Segment of the *enrollment*-panel of a online course room

Field or Widget Label	Description/Details
Users can enrol	course is/is not open to enrollement
Course internal/external manual enrollment after	interested participants can ask for enrollment; enrollment has to be done manually

external booking	
Runtime	runtime of course offering
enrollment allowed till	Options: *before event starts*, after event starts, *before event ends*
Subject to Approval	Approval neccessary; value list to mark approval parties
Overwrite Approval Amount	override any course fee limit for approval competence in the user account of the responsible approver
Force Approver (Email)	override any approver with given value (email adress of new approver)
enrollment Limit	Max. number of participants
Waiting List	Course will have a waiting list
Reminders after Enrollment	Reminder will be sent after enrollement (3 possilbe reminder)
Charge	Course Fee
Fee Remarks	Remarks concerning the fee (by default displayed in the course catalog single view)
Admin Fee	Administrational fee
Admin Fee Remarks	Remarks concerning the administational fee (by default displayed in the course catalog single view)
Canceling fee	Fee for cancelling participation;
	Can be escalated in serveral levels by using option: *Charge from n day(s) before the event starts*
Annotation	Remarks concerning the canceling fee (by default displayed in the course catalog single view)

7.9.4.6 Files

The *files*-panel allows access to the repository attached to the current node; in the online course room this repository is identical with the data folder the integrated OS-LMS provides for the current online training. The panel is splitted up into 3 areas:

7.9.4.6.1 Repository Annotations

The annotation field allows to insert some text, which will be shown on the course catalog single view to comment on files, which the user can download from the repository once she is enrolled to the course.

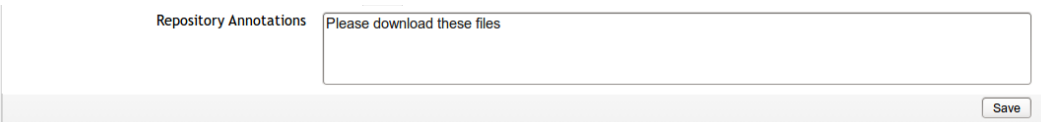


Fig.: *Files*-panel showing an annotation field.

7.9.4.6.2 Uploader

The uploader provides functions to upload files to the repository.

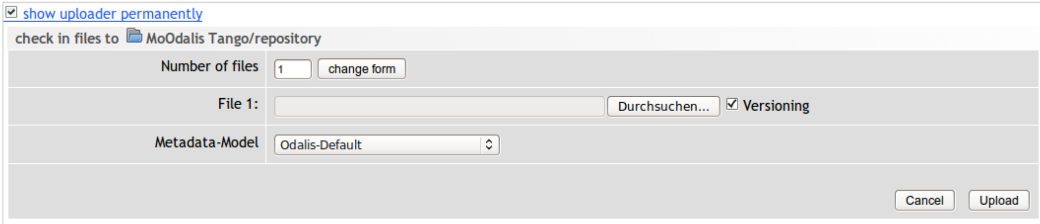


Fig.: *Files*-panel showing uploader.

Field or Widget Label	Description/Details
Show uploader permanently	Show or hide upload form
Number of Files	Allows the selection of serveral files for uploading
File 1 ... n	File select widget
Metadata Model	Choice of template for prividing meta data to the uploaded files

More information about the upload- and indexing functionality can be found in *8 Repositories*.

7.9.4.6.3 File list

The file list shows all files available in the repository. Files can be moved, copied and linked (*alias* creation) to other repository folders as well as deleted, provided the user with the necessary access rights.

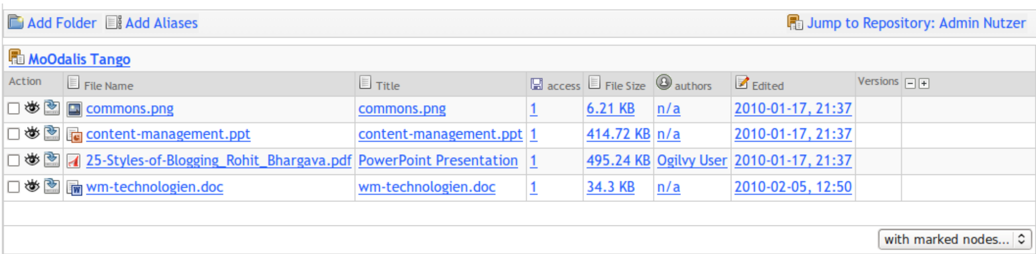


Fig.: *Files*-panel showing an annotation field, the uploader and the file list.

For more information about the available functionality please consult *8 Repositories*.

7.9.4.7 Tasks

The *tasks*-panel provides functionality to create and manage a todo list for the current node. A detailed description will be subject on the 2nd level of configuration with further features.

7.9.4.8 Feedbacks

The *feedbacks*-panel allows to store, review and manage feedbacks from attendees and teachers at online and classroom training courses. Odalis LMS provides a standard feedback form but also allows to offer a custom form based on an XHTML-template.

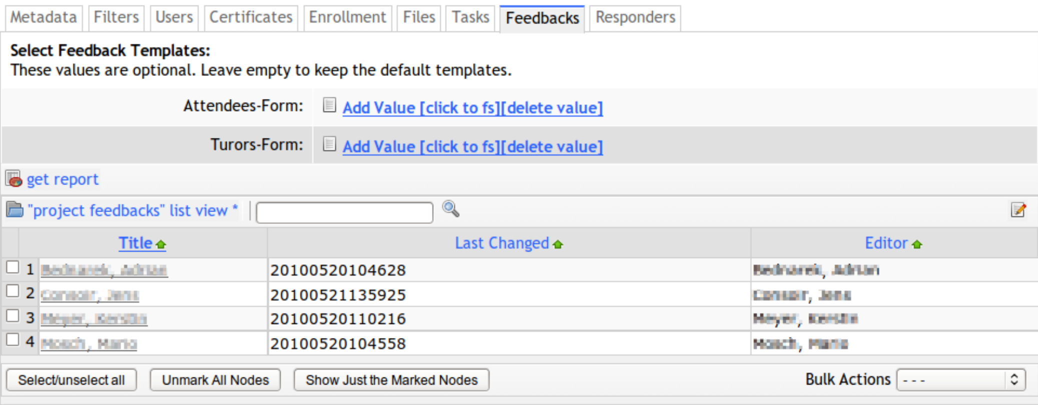


Fig.: *Feedbacks*-panel with a list of already collected feedbacks.

Field or Widget Label	**Description/Details**
Attendees-Form / Add Value	Selection of form template for attendees feedback
Tutors-Form / Add Value	Selection of form template for tutor feedback
get report	Quick access to report listed feedbacks
Select/unselect all	Toggle selection of listed feedbacks
Unmark All Nodes	Cancel selection
Bulk Actions	Available options: • *delete* • *export nodes*

7.9.4.9 Responders

In case an onlne or classroom training course should not use the system-wide responder (see *14.1.1 Responders*), the *responders*-panel provides an easy way to set up a custom reminder. This reminder is currently restricted to one language.

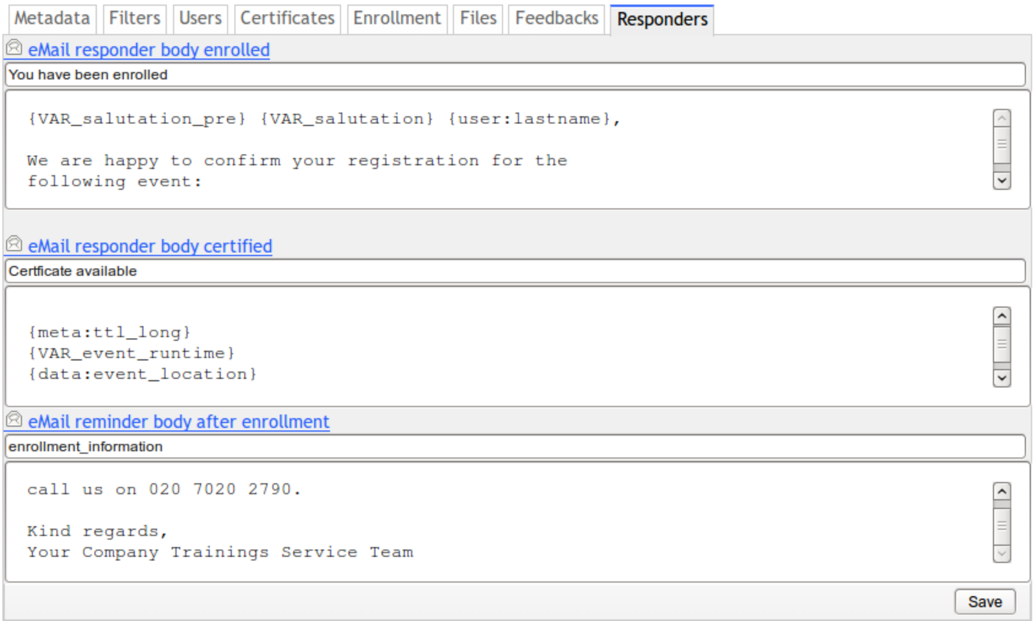


Fig.: Custom responders for an online training course

7.9.5 Panels: Classroom Training Courses Folder

7.9.5.1 Metadata

The *metadata*-panel on the classroom training course folder node allows to create new events such as classroom training courses.

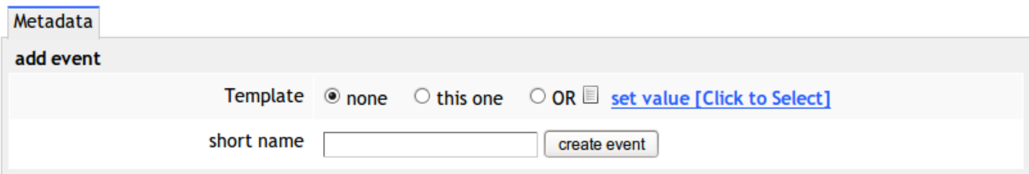


Fig.: Classroom training courses folder has only a *metadata*-panel to create new events such as classroom training courses.

7.9.6 Panels: Classroom Training Courses

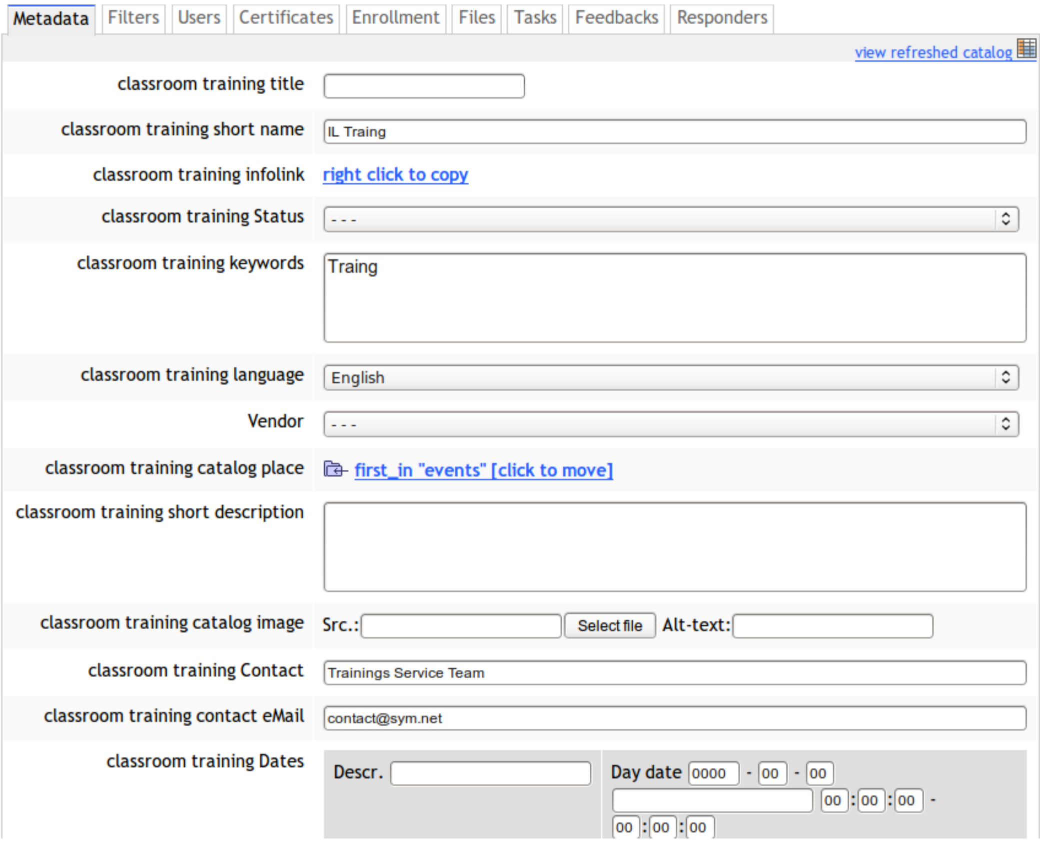


Fig.: Classroom training course node with *metadata*-panel; additional panels available at this node are: *filters*, *users*, *certificates*, *enrollement*, *files*, *tasks*, *feedbacks* and *responders*.

The classroom training course node will by default contain the following panels:

7.9.6.1 Metadata

Field or Widget Label	Description/Details
Title	title
Short Name	short name
Infolink	Link e. g. to be sent per email for direct access to the course catalog entry
Keywords	keywords e. g. for search
Language	information as displayed in the course catalog
Vendor	institution or individual, that/who offers the training (usually in case of external offerings)
catalog Place	Position of the course (e. g. category)
Short Description	Short description
catalog Image	Image displayed in the course catalog
Contact	Name and/or institution

Contact Email	Email adress
Dates	Day(s) and time of the training
Takes Place on a Holiday	Marker that training takes place on official holidays or office closing days (usually necessary for works council notification)
Feedback	Show or hide link to feedback form in course single view after attending the course
Venue	Venue the training takes place at
Additional Comments	Additional participant information usually displayed in the single view of the course catalog
Study Time	Supposed amount of time to work through the course

Tab.: Widgets and fields of the metadata-panel for a classroom training course.

7.9.6.2 Filters

See *7.9.4.2 Filters*

7.9.6.3 Users

See *7.9.4.3 Users*

7.9.6.4 Files

See *7.9.4.6 Files*

7.9.6.5 Tasks

See *7.9.4.7 Tasks*

7.9.6.6 Feedbacks

See *7.9.4.8 Feedbacks*

7.9.6.7 Responders

14.1.1 Responders

7.10 Enrollment and Associated Workflows

7.10.1 User Statuses

Once a user starts an enrollment process (e. g. request for an approval to participate in a training) she has a certain *user status* corresponding to a state within the learning process. The following statuses are available by standard:

Status Label	Description/Details
enrollment_asked	nominated / sent (future participant is asked to enrole)
approval_asked	request for approval (usually from future participant to superior)
waiting_and_approval_asked	course with restricted number of participants, at time of tried enrollement no setas available while approval is not yet given
waiting	course with restricted number of participants, at time of tried enrollement no seats available

enrolled	enrolled / after approval (usually by superior)
approval_denied	approval denied (usually by superior)
cancelled_admin	agent is usually: admin; further differentiation of reasons possible (e. g. health, private, business)
cancelled_self	agent is usually: user; further differentiation of reasons possible (e. g. health, private, business)
cancelled_self_replaced	agent is usually: user; a replacement was give as a valid eMail-address of an accounted user
attended	participant attended the course
no_show	participant did not attend the course
graduated	user has a grade
certified	participant is certified

Tab.: Default options to track the uses status in the learning process

Status changes will be triggered by defined events such as

- an enrollment of the user by clicking on the enrollment button on the course catalog single view (see *4.4 Single View*) or
- an approved request for course participation by a superior or
- a manual status change by an authorized individual on the *users*-panel of a course room.

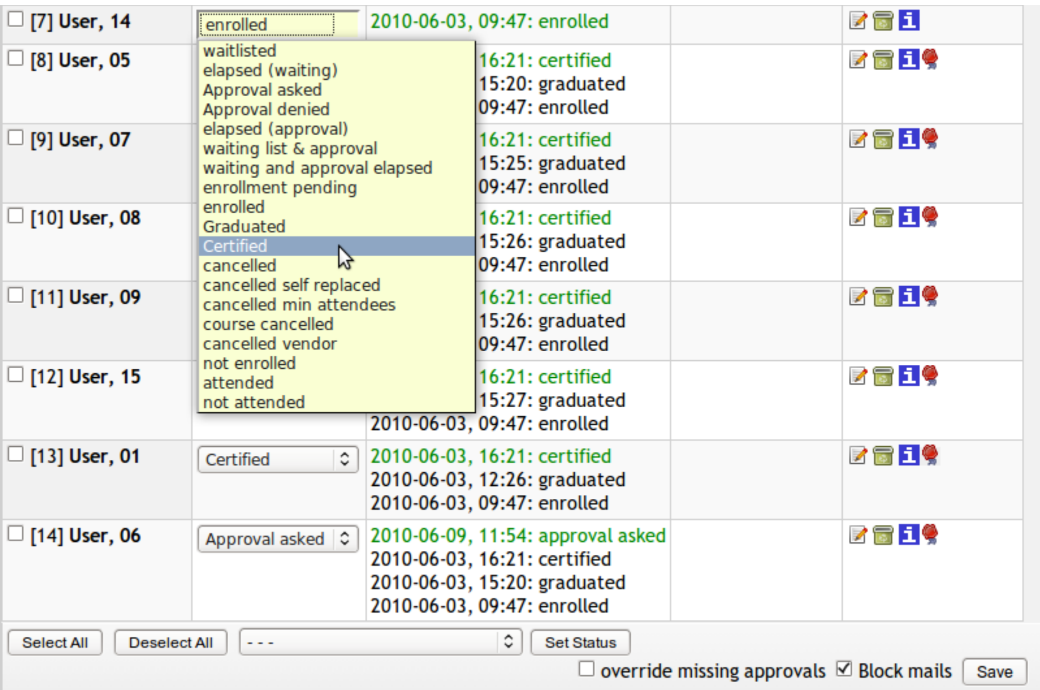


Fig.: Changes of user statuses are either done by an authorized person such as the course adminstrator or automatically by certain triggers such as an enrollment or a cancellation by the user.

An overview of all changes of the user's statuses is provided by the *status history* (see *7.9.4.3 Users*).

7.10.2 Approval Process

The standard approval process is implemented as follows:

7.10.2.1 Prerequisites

1. Users are assigned to an approver; this can be done in different ways:
   - The user records of all users contain a field *organizational_id* (or a comparable token) with a valid value. All user records marked as authorized to approve requests for participation in learning offerings contain a valid *approve_by-organizational_ids* (or the appropriate token) matching the group of users they are reponsible for.
   - Users are assigned to an individual approver in the user data record (see *user management* > *Miscellaneous*(-panel) > *approver*)
   - The course is marked to have a specific approver (see *enrollment*(-panel) > *course force approver*)
2. All courses, which are subjects for approvals are marked as such and an approval instance is selected (*enrollements*-panel, see *7.9.4.5 Enrollments*).
3. Additionally a course can be also subject for an approval by certain groups of HR approvers, which will be available for selection on the *enrollment*-panel (implementing a four-eyes-principle for approval).
4. Approvers belonging to a certain group of HR approvers are marked as such by the field „HR_Approver“

7.10.2.2 Workflow

- The user triggers a request for approval by trying to enroll to a course subect to approval. If the approver can not be identified (see different options above), the system reacts as following:
  - The user will be presented with a list to choose among all users, that have been marked as approvers (in case the number of approvers is to high, a preselection e. g. according to *domain* or another token of a user record can be made).
  - If the list does not contain the approver the user knows of, she can insert an email address and the system tries to find an approver matching the given email address.
  - If no approver can be identified, the system displays an appropriate message; further process escalation can be implemented according to clients rules.
- Once the approver is identified, the user will get an email message and will be set to the status *approval asked*.
- All responsible approvers will get an email message including a *passport link*, which allows a *one-click*-login which is valid for the current session only, leading to MyTasks-area, where the approvers can approve or deny the participation.

- If the approval is denied, the user will get an appropriate email message and will be set to the status *approval denied* with respect to the course.
- If the approval is granted, the user will get an appropriate email message, become enroled and be set to the status *enrolled* with respect to the course.

7.10.3 Waiting List

A waiting list can be activated for any online or classroom training course course. The standard approval process is implemented as follows:

7.10.3.1 Prerequisites

- The checkbox *waiting list* is activated on the *enrollment*-panel
- A max number of participant is inserted in the field *enrollment limit* on the *enrollment*-panel (see *7.9.4.5 Enrollments*)

7.10.3.2 Workflow

- In case the number in the field *max enrollments* on the *enrollment*-panel is reached, all additional user enrollments for a course subject to will be stored.
- After trying to enroll, these users will get an appropriate email message and will be set to the status *waiting*.

NOTE: By default there is no automatic enrollement of waitlisted users. The administrator or another entitled individual has to enroll users with the status *waiting* manually.

Go to the course's enrollment-panel and check the box *Automatic moving up in case of an open slot*, if you want users automatically to be enrolled in case of open slots.

In case the course enrollment is subject of approval, each process has to be resolved to enroll the user; initially the user will have the status *waiting and approval asked*:

1. In case the user will be approved, the status will change to „waiting“ and has to be resolved manually by e. g. the administrator.
2. In case the user should be removed from the waiting list the adminstrator or another entitled individual has to set the user to *approval asked* in order to secure, that the already triggerd approval request is not overridden.

7.10.4 Cancellation

7.10.4.1 Self cancellation

A course participation cancellation can be done by the user herself starting from the course single view. If the user has already been enrolled, she will find an appropriate link.

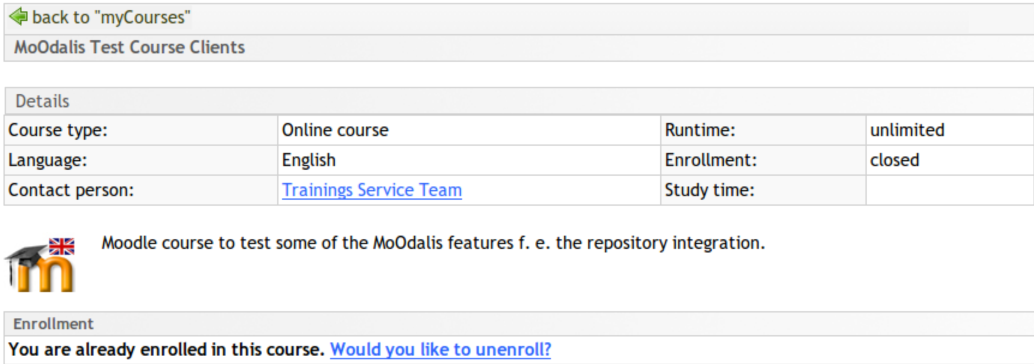


Fig.: User is enrolled to a course and will get an unenroll-link displayed in the bottom area of the courses single view (here: „Would you like to unenroll?").

After clicking on the link, the user will be able to insert a reason for cancellation:

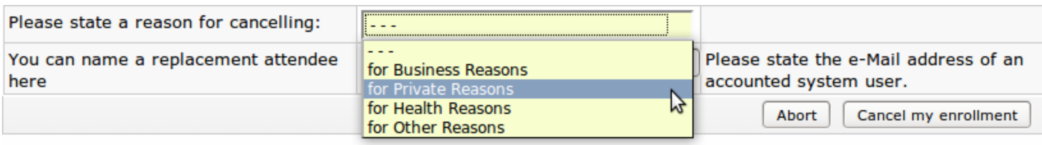


Fig.: Option to provide another user's email adress to propose a substitute participant in case of cancellation.

Further more you can fill in an email address of a substitute participant or leave the field empty and cancel without substitution.

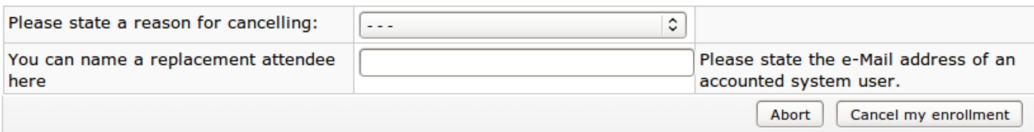


Fig.: Option to provide another user's email adress to propose a substitute participant in case of cancellation.

If a substitute participant has been named, the system will check, if the provided email address is valid and add the corresponding user to the course room, stetting her status to the appropriate value (see above). The cancelling user's status will be set to *cancelled self_replaced*.

If no user can be found matching the given email address an appropriate message will be displayed.

If the cancelling user leaves the email field blank, the course will be cancelled without a substitution being notified.

To track any cancellation costs the appropriate data has to be provided in the field *cancellation fee* on the *enrollments* panel (see *7.9.4.5 Enrollments*).

7.10.4.2 Cancellation via users-panel

A users enrollment can always be cancelled by setting the *cancel* status on the *users*-panel of an online or classroom training course. There are several *cancel*-statuses available to track the circumstances of a cancellation for accounting and reporting purposes (see *7.10.1 User Statuses* for detailed information). Also here you can state a reason for cancellation:

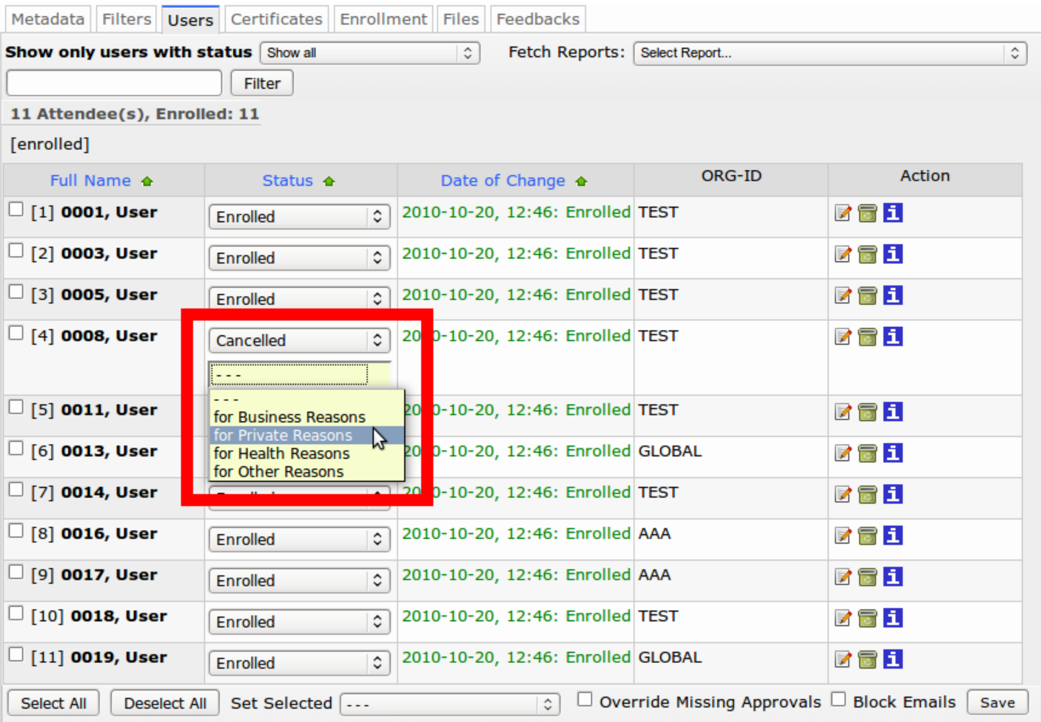


Fig.: Administrators, course creator and/or teacher with writing access to the user-panel can cancel users at any time.

7.10.4.2.1 Cancellation of a complete course

You can also cancel a complete course using the *status*-field on the *metadata* panel. A cancellation from this panel will set all participants to the status choosen.

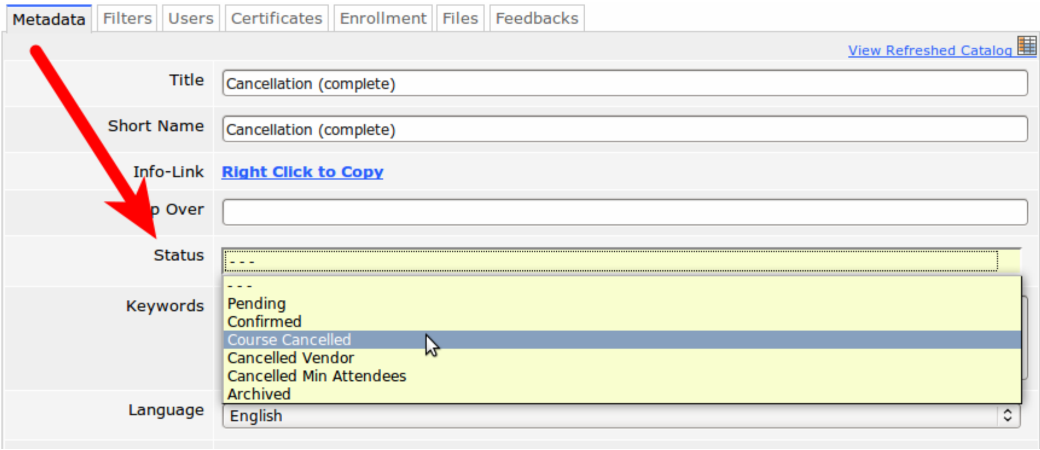


Fig.: Using the status-field on the metadata-panel a complete course (including all participants) can be cancelled at once.

8 Repositories

8.1 Introduction

A repository within *Odalis LMS* is a facility for the deposit of files, documents, archives and media. In more detail the repositories in *Odalis LMS* provide the following services:

- storage of unstructured data like documents, images, media and content objects like *SCORM* packages.
- indexing of contents to facilitate search functions and automatic filling
- providing a centralized storage to be shared by multiple users and/or learning events

All the following nodes may have a repository which can be accessed via the *files*-panel:

Server

Category

Online training course rooms

Classroom training course

Repositories at a higher level can provide resources for all lower level nodes (assumed the user has the appropriate access rights).

EXAMPLE: Files stored at the repository of a category „English language courses" can be used in all online as well as classroom training courses located within this category.

8.2 Using the file manager

All repositories are accessible by using the file manager

- either from the *files*-panel of the *LPM* or
- from an online course room (see *8.5 Using the repository from within an online course room*)

The file manager shows a list of folders and files and contains functions

- to upload, administer, preview and select files,
- to accomplish certain tasks with a selection of files (e. g. move, delete etc.,
- to create new folders and
- to navigate through the folder structure

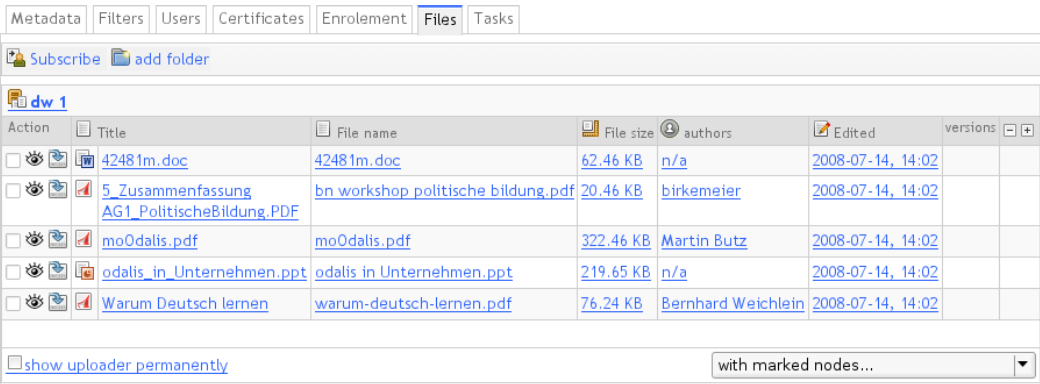


Fig.: *Files*-panel with file manger. The upload form can be opened by checking the box *show uploader* at the bottom left corner

The list of files conains several columns:

Column/Icon	Description
Action	
Checkbox	Mark file to apply some action (see the selectbox *with marked nodes ...* in the bottom right corner)
	Preview of the current file; you can also click the linked entries (e. g. file name or size) to switch to the file preview
	Select the file (only visible, if the select function is available, e. g. while adding a new resource within a course room, see *8.5.2 Integrating files from a repository within a course room*)
	Save the current file to you local harddrive
file type icon	File type; changes according to the current type of file (e. g. Microsoft Powerpoint or Word etc.)
title	file title (not identical with the actual file name)
name	file name (file name on the harddrive)
size	file size
authors	authors
edited	date of last edit
version	version (if versioning is activated)
+ −	add / remove column to customize the view

The selectbox *with marked nodes ...* shows several actions which can be chosen once one or more files can be checked:

Entry	Description
move to...	move file to location selected with *node selector*
copy to...	copy file to location selected with *node selector*
Delete	delete file
Print or send	
print	function currently not available

write PDF...	function currently not available
format linklist and send...	function currently not available
pack	
as ZIP-archive	function currently not available
as ZIP-archive and send...	function currently not available
as TAR-GZ-archive	function currently not available
as TAR-GZ-archive and send...	function currently not available

8.3 Upload of files

To upload a new file use the uploader form beneath the file list; if the form is not visible check the box *show uploader* at the bottom left corner of the *files*-panel:

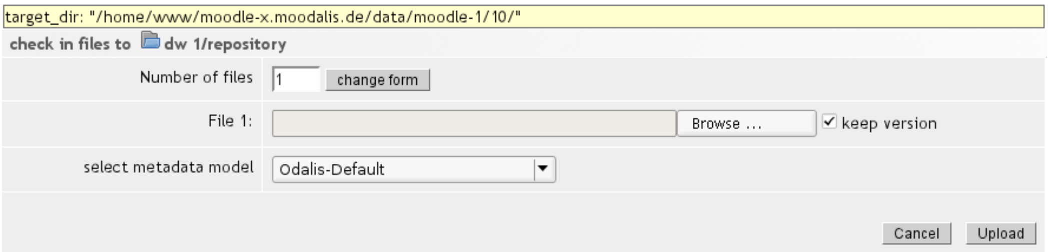


Fig.: File uploader

Then choose *browse* to search your local harddrive for the file you want to upload

- Click *Upload*
- You will then be requested to provide some metadata according to the scheme the field *select metadata model* is set to (see *8.4 Metadata sets* for more information).

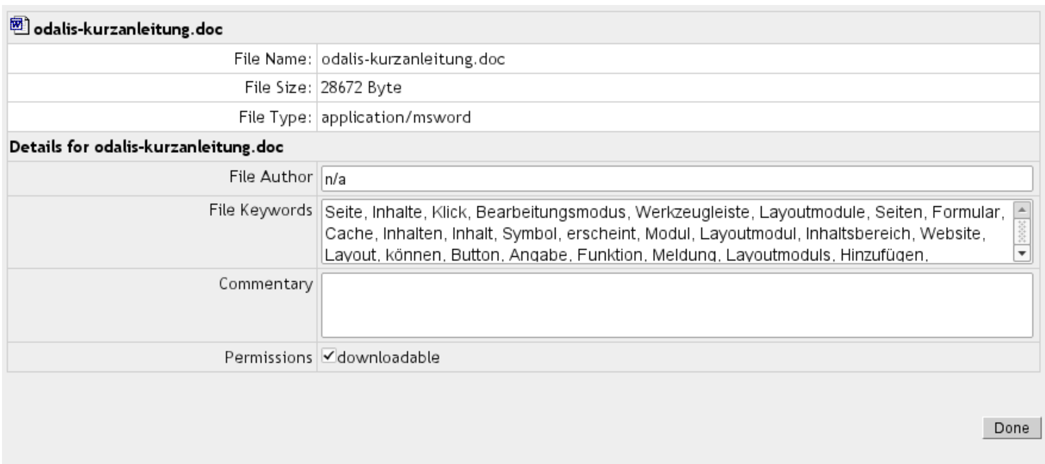


Fig.: metadata form for the uploaded file

You can savely leave all fields blank, if you cannot provide any metadata; alternatively, you can edit the keywords and remove automatic keyword entries which do not look relevant to the file content. See *8.4 Metadata sets* for more information about metadata sets.

Once you have clicked *done*, you will get a preview of the file; the preview will display metadata information as well as the full text of the file.

> **NOTE**:The process of indexing only applies to full text and line breaks, any special formatting like layout and color information will not be preserved.

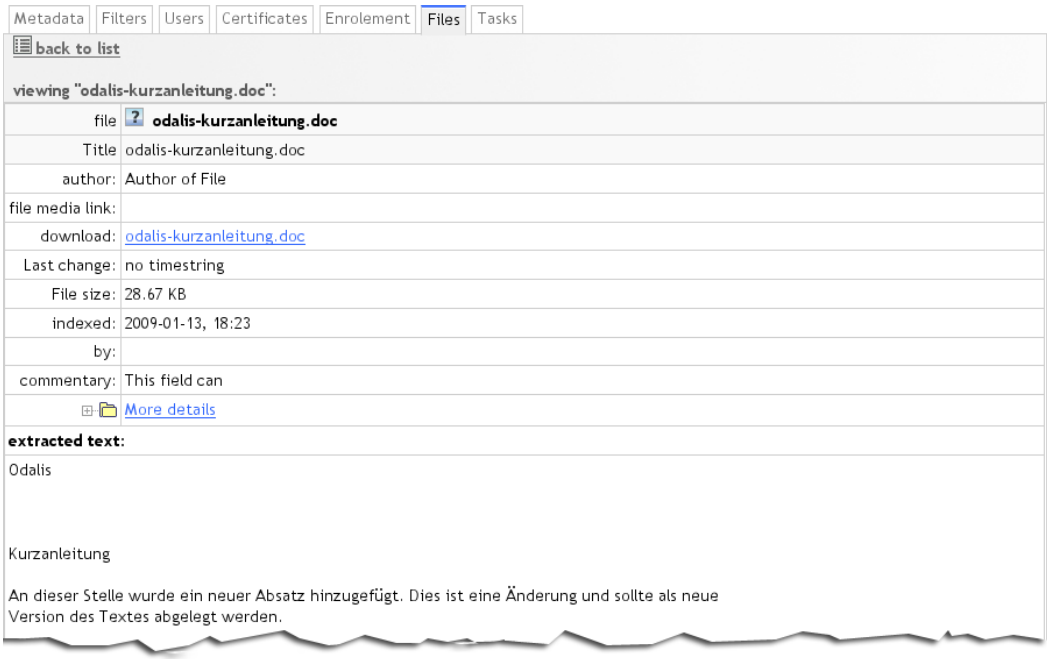


Fig.: File preview with metadata table and extracted full text (section)

The icon/link *back to list* leads back to the list view of all stored files for the current node.

8.4 Metadata sets

Odalis LMS supports any desired metadata set. Currently the following sets are preconfigured:

8.4.1 Odalis default

The Odalis-default metadata set contains the following fields:

Field Name	Description
author	will be filled in automatically as long as Odalis can read the files metadata header

keywords	will be filled in automatically on the basis of a fulltext scan an statistical analysis
commentary	provide a commentary or short description if desired
Present irrespective of the chosen metadata set	
Permissions ... downloadable	if checked the file will be accessible for download for any user with general access rights to the file; if not checked, once the user clicks the link to the file, she will get a request form to contact the file's author

8.5 Using the repository from within an online course room

8.5.1 Browse or search a repository using the Odalis LMS block

You can use the repository from within online course rooms by clicking on the *Odalis LMS-Repository* link in the *Odalis LMS* block located in the left or right column of a course room.

Odalis LMS block in an online course room (left or right sidebar).

If you do not find this block, it was probably deactivated by the administor.

Once clicked a separate window will be opened showing the *project tree*, the file manager and -if not hidden- the uploader (upload form):

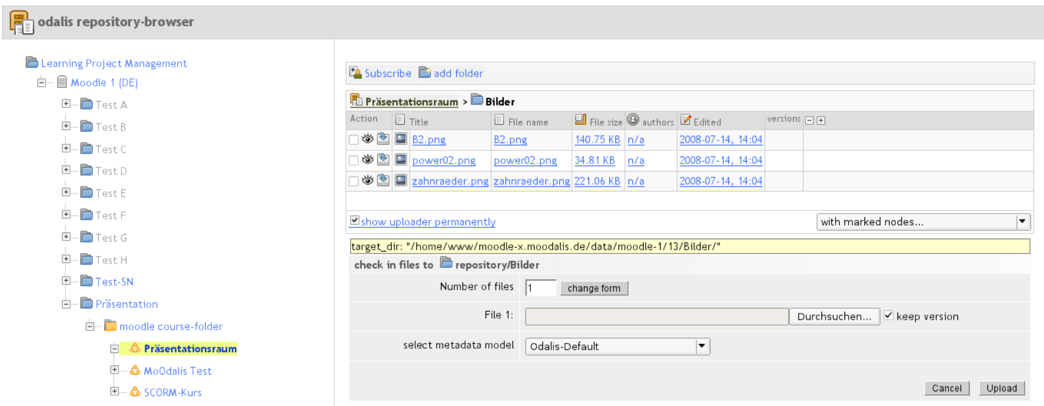


Fig.: Odalis LMS repository browser: project tree (left side), file manager and uploader

The project tree shows all nodes, to which the current user has access rights. To change the repository choose an entry from the project tree. You can than browse the related repository or perform actions upon the files as described in *8.2 Using the file manager*.

8.5.2 Integrating files from a repository within a course room

You can provide any file from the repositories presupposed you have the necessary access rights. The integration can be accomplished in several ways using the *Odalis LMS* resource activity and the file manager.

Start from the course room by:

1. turning the editing on and
2. choose *add a resource* > *add a Odalis LMS resource*
3. provide at least a *name* and *choose or upload a file*

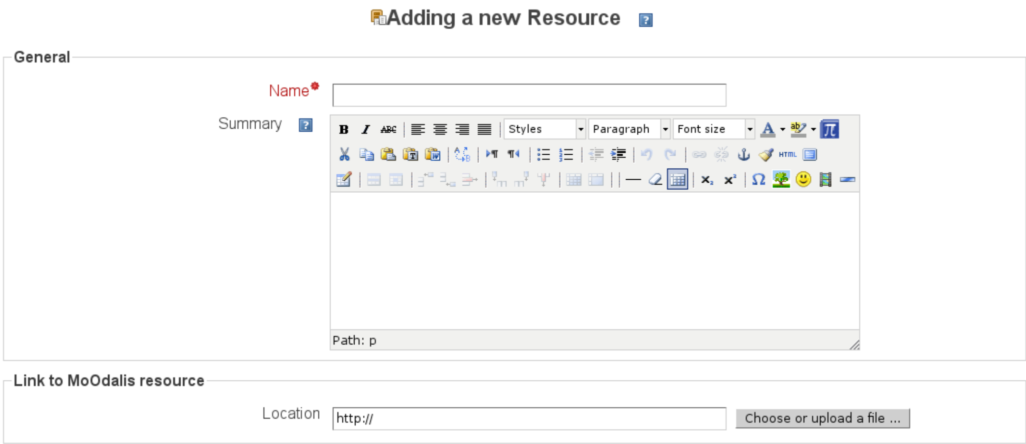


Fig.: Add a new resource within a moode couse room (section)

A popup window with the *Odalis LMS repository browser* will be displayed.

8.5.2.1 Linking directly to files

Provided you have the neccessary access rights you can directly link to any file within the repositories:

- Choose the desired repository by browsing through the project tree
- Click the select icon to choose a file within the file manager list once you've reached the desired repository
- the repository browser window will be closed after the user has chosen a file
- choose *save changes and return to course* or *save changes and display*

For more information about the *Odalis LMS* resource type click the help icons next to the field labels.

8.5.2.2 Move, copy or create a file alias

Apart from simply linking a file you can move or copy a file or create an alias. Choose the desired repository by browsing through the project tree:

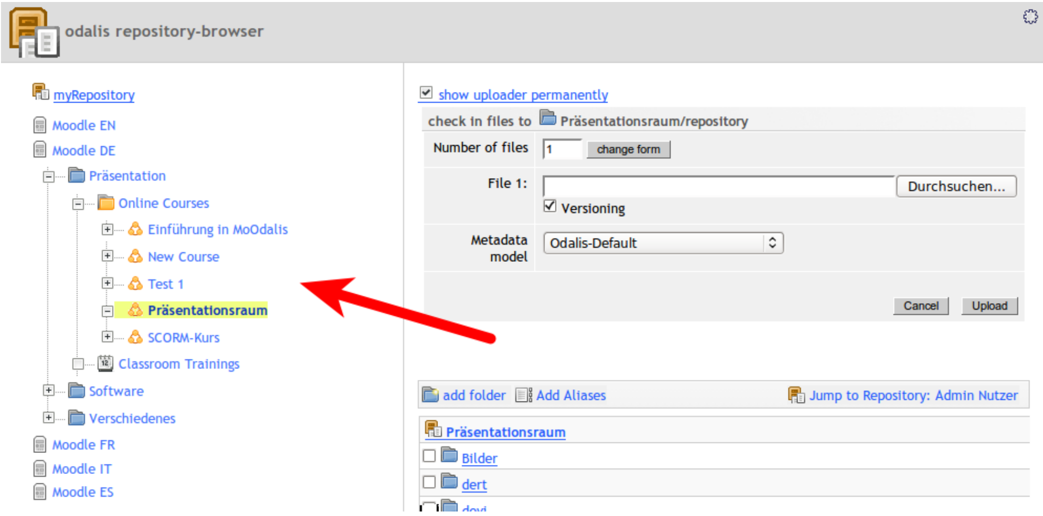


Fig.: Browse the project tree to change into the desired repository

Check the checkbox in the first column of the desired file:

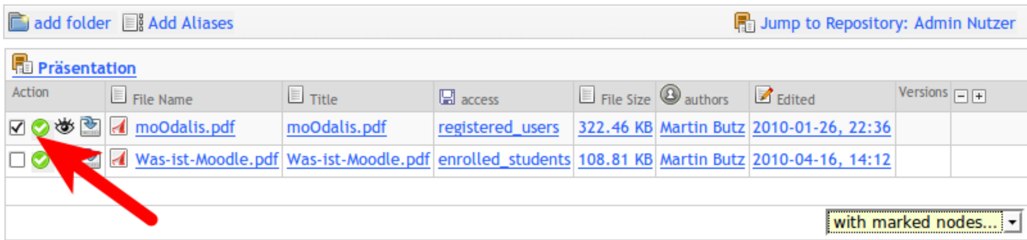


Fig.: Choose a file you want to move, copy or alias

Choose *move to...*, *copy to...* or *write alias in...* from the selectbox with marked nodes...

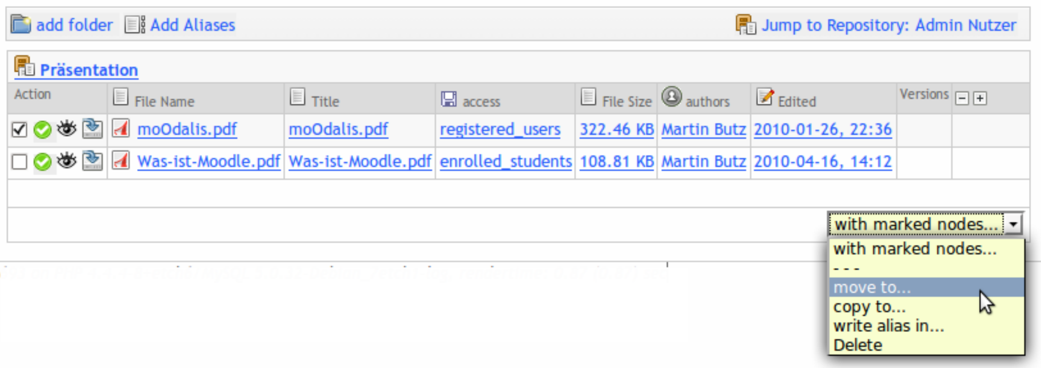


Fig.: Select an action

You will then see a dialog asking to choose a folder:

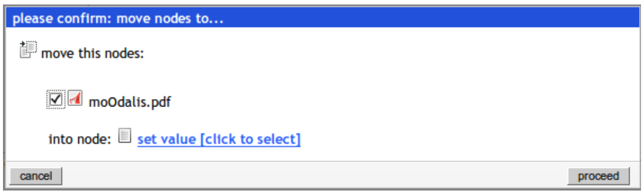


Fig.: Call the node selector to determine where you want to move, copy or alias the checked file.

click *set value* to get the *node selector* and

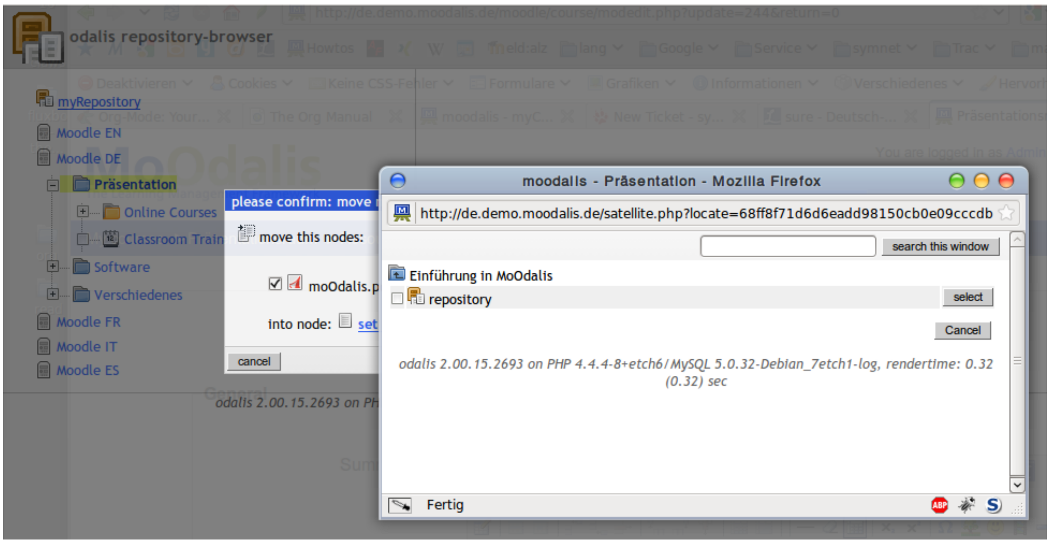


Fig.: Navigate to the repository folder, where you want to move, copy or alias the marked file

select the desired folder with a double click (probably the online course where you want to provide the file resource); if the folder is a valid repository, the node selector pop-up will close.

Click proceed to close the dialog box; you will see the filemanager of the current repository node i. e. the node where you have just moved, copied or aliased the file.

You can now select the file by clicking the select icon . The repository browser will close and you can go on to complete the Adding-a-ressource-form:

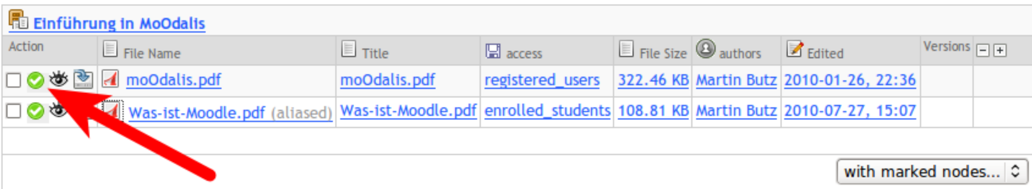


Fig.: The field location now conains a path and file name

A file alias should be used, if you would like to give access to resources without making copies.

EXAMPLE: A video file has to be available within several course rooms. The editing teachers only have access to the data folder of their courses. You can store the video at a higher level repository (e.g. a category's repository) and set aliases in different course room repositories. The editing teachers will find the alias to the video file and be able to provide the video as a resource.

8.5.2.3 Deleting files from the repository

To delete a file from the repository check the checkbox in format of the file name and choose *delete* from the select menu *with marked nodes* .

9 Grading and Certificates

9.1 Introduction

Summary: If a user has the state *graduated*, she can get a personalized certificate. The *certificate*s-panel will list all users with the state *graduated*. Individual certificates will be generated on the base of templates. These templates can be edited with the certificate editor.

9.2 Course Completion and Grading

Course completion is the process in which the system can determine, that a user finishes a course attendance (e. g. by attending an quiz and handing-in the results)

- and the attendance will be graded according to certain criteria. This can be done automatically or manually by a teacher or trainer.

To get a certificate the user must be *graded* by setting the status to the value *graduated* on (see *7.10.1 User Statuses*).

Afterwards the graduated users will be listed as entitled to get a certificate on the *certificates*-panel (see *7.9.4.4.4 Graduated Students*):

Users can get graduated manually irrespective of any course outcome by a administrator or course tutor, who has writing access to the *users*-panel.

9.2.1 Automatic grading and certification

Usually the state of graduation is dependent on the user's outcome from a quiz or an other learning activity. Odalis LMS will compare available data with the value of the field *passing score* on the *certificates*-panel (see *7.9.4.4.2 Selfgrading*). If the comparison shows that the outcome is equal or higher to grade passing score, the user's state will be set to *graduated* and the certificate destribution can be triggered.

9.2.1.1 Using the Selfgrader Activity in the integrated OS-LMS

The *selfgrader activity* allows a student to finish an online training and request a check, whether she can be graded. The *selfgrader* activity can be added to a course room like any other activities.

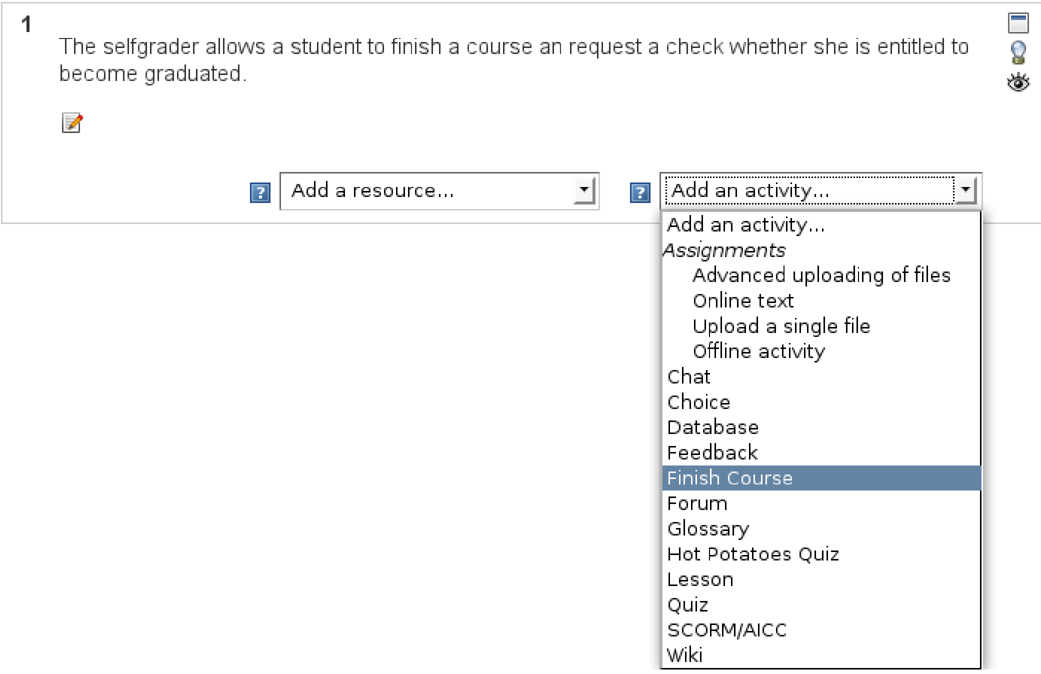


Fig.: Add a *selfgrader* activity to the course room

To determine whether a user is entitled to become graduated you can either check for:

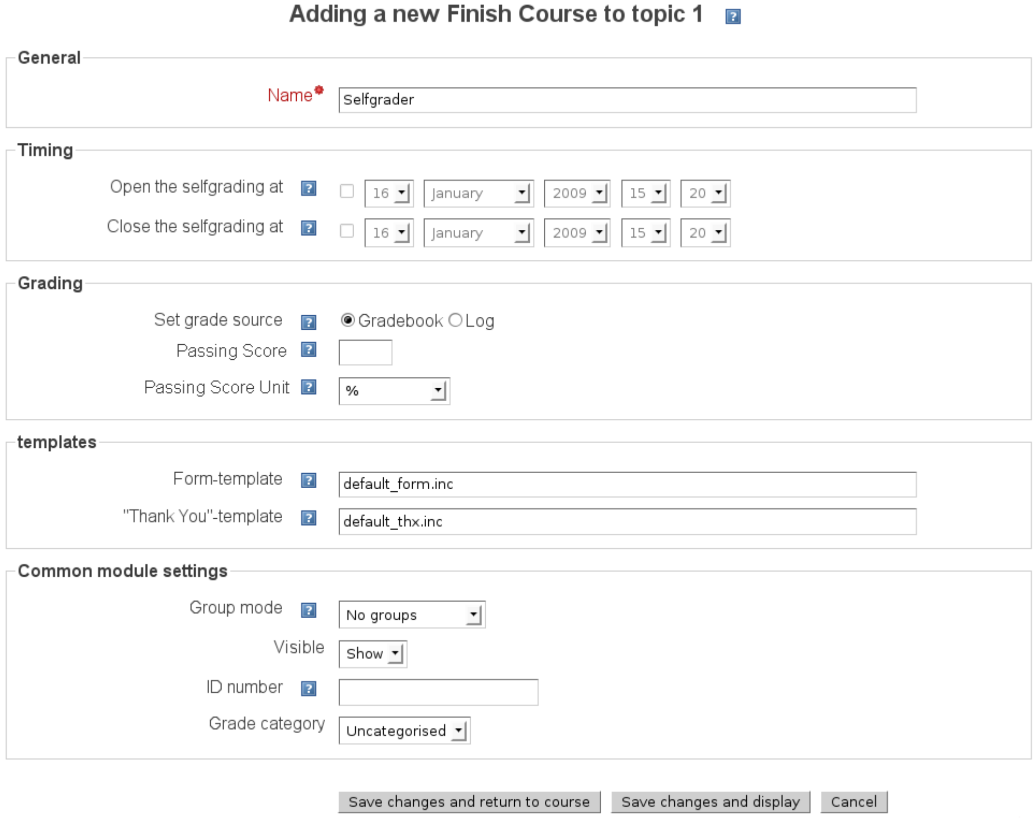
- a certain outcome as a result of an activity graded by using points or percent or
- a number of page views, if the course room does not contain any graded activities

Example: If you have a quiz with possible 100% and you want to grade a user with 80 % set *grade source* to „Gradebook“, *passing score* to „80“ and grade passing score unit to „%“.

If you want to check for page views set *grade source* to „Log“, *passing score* to the number of required page view „80“ and grade passing score unit to „%“

Fig.: Online course room with selfgrader activity configuration form

NOTE: Checking for the number of page views is not very reliable, because the selfgrader does not know whether one page has been viewed ten times or ten pages have been viewed one time per page. The higher the amount of content pages the more reliable the estimation based on the number of page views will be.
You should consider to include a simple quiz activity, to check if the user has worked through the material, if you want to use the selfgrader.



Once the participant uses the selfgrader activity the grades will be checked. If the outcome in the gradebook or the number of viewed pages matches the field value *Passing Score*, the user will be prompted to finish the course. Otherwise there will be an alert, informing the user, that the current outcome is not sufficient to finish the course.

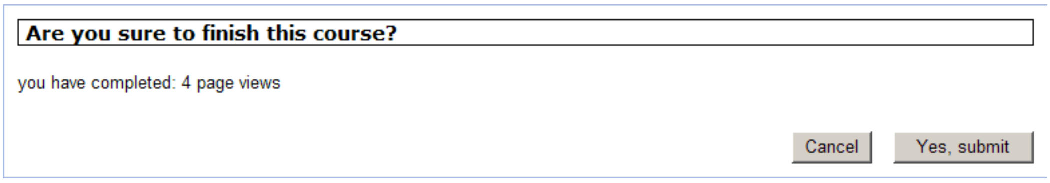


Fig.: After having clicked the selfgrader activity the user can finish the course.

The user will then be informed about having finished the course.

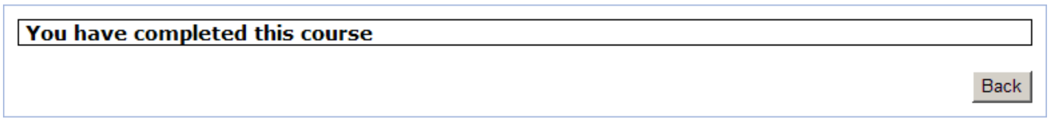


Fig.: Message after course completion.

The course will show up within the history view or the *MyCourses*-area.

9.3 Certificate template editor

To deliver certificates to your users a template has to be prepared (*certificate editor*). Once the template is ready for use, you can assign it to a specific course (*certificates-panel* in the LPM); afterwards you can deliver personalized certificates to the graded users.

The certificates are being created and edited within the certificate editor located at *MyOdalis > adminCenter > Certificates* (at the time being). The categorization of certificates can be done according to the domain, course type or other criteria.

NOTE: Althought templates can be edited within the WYSIWYG editor area this editor is not as rubust as e. g. text editing programm as Microsoft Word. In certain cases it will be necessary to edit the XHTML code to achieve the desired result. *Thus users who are in charge of the certificate template setup should have a sound knowledge of XHTML and CSS.*

A toolbar on top provides functions to navigate the categories and/or to create a new certificate. Once you have created a new certificate or you choose an existing certificate template you will see the editor:

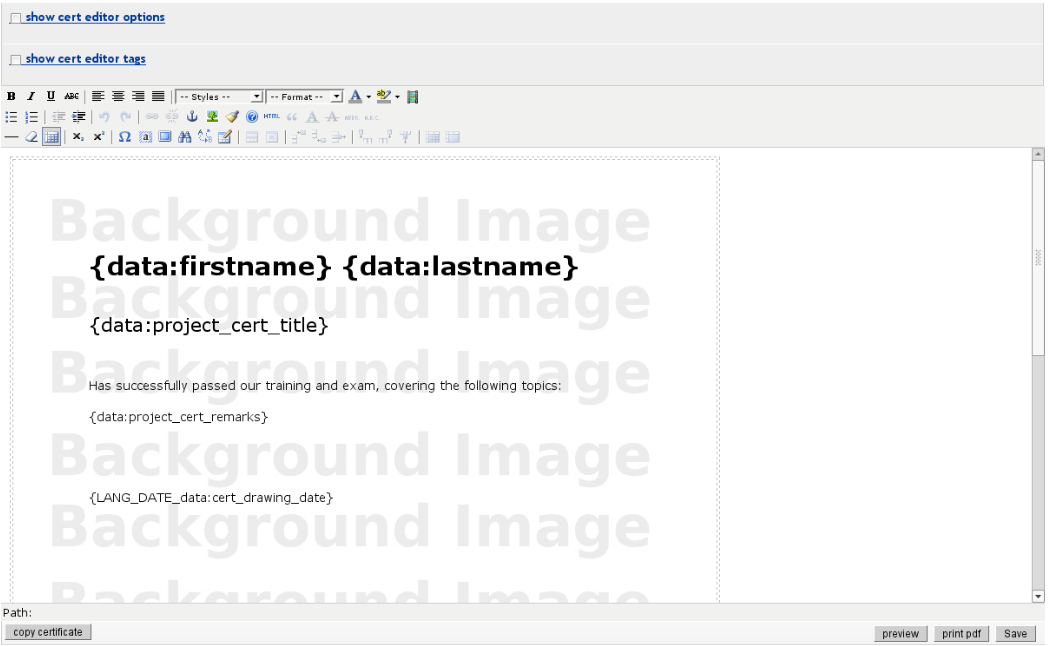


Fig.: Complete view of the certificate editor. The *option* and the *tag* area at the top are folded.

The editor consists of

- an *option* area: prioviding several options and data input fields for the current certificate template
- a *tag* area: showing the available data placeholders to be inserted into the certificate template (f. e. `{data:lastname}` to print the participants lastname into the individualized certificate) and
- a WYSIWYG editor area, where you can layout the final certificate.

9.3.1 Create and edit a certificate template

To add a new certificate click the link add certificate. The certificate editor provides a default template, which can then be adapted to specific needs.

NOTE: Default templates can be provided for any node. Usually a default variable will be set e. g. for a specific domain or devision, delivering a path value to the template folder. Default templates have to be created as an XHTML file.

Within the option area you can adjust different settings for the current certificate template:

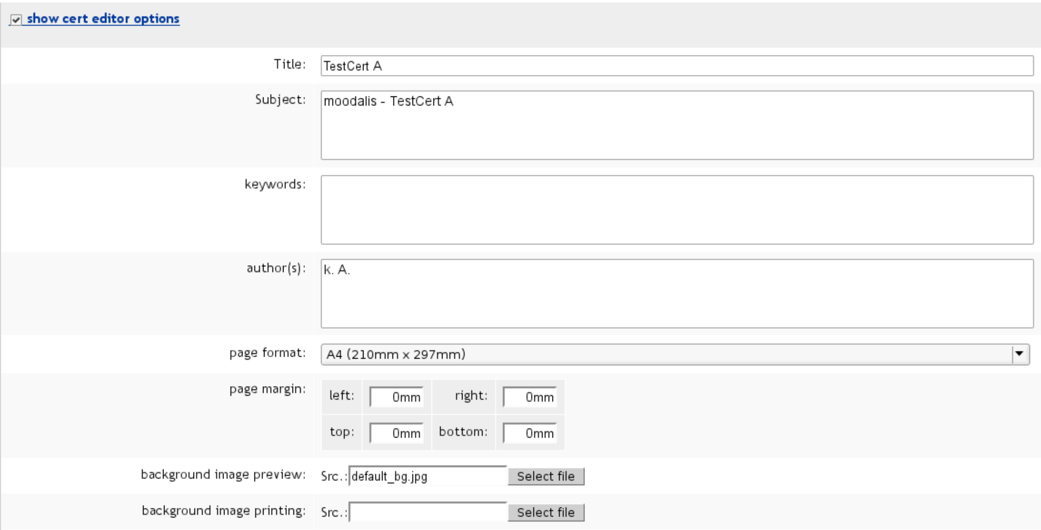


Fig.: Certificate editor options area

The follwing data and options are available.

Field Name	Description	Recommendation
title	certificate title; will be available to be printed in the individually rendered certificates as `{data:project_cert_title}`	fill in as heading of the individualized certificate
subject	description or purpose of the current certificate template	optional for administration purposes
keywords	keyword for the current certificate template	optional for administration purposes
author(s)	author(s) for the current certificate template	optional for administration purposes
page format	pdf/print page format	necessary for PDF/print version
page margin	pdf/print page margin	optional for PDF/rprint version
background image preview	low resolution background image for screen preview version	
background image printing	high resolution backgrond image for pdf/print version	

You can edit the template within the WYSIWYG editor:

- set up the general layout
- insert general text (which will be used in all individualized versions based on the current certificate template) and
- insert placeholders (see *9.3.2 List of available placeholders*)

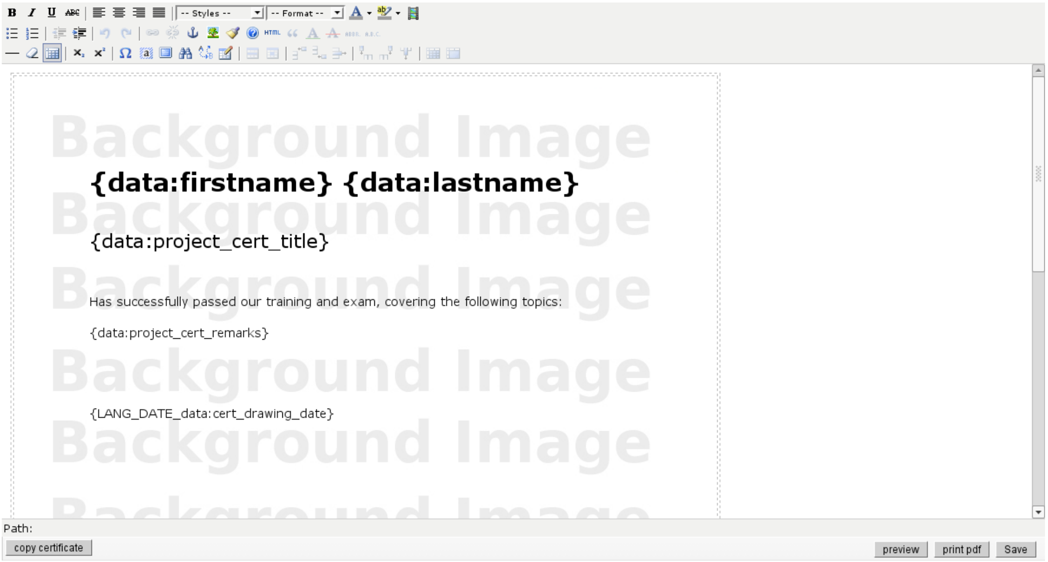
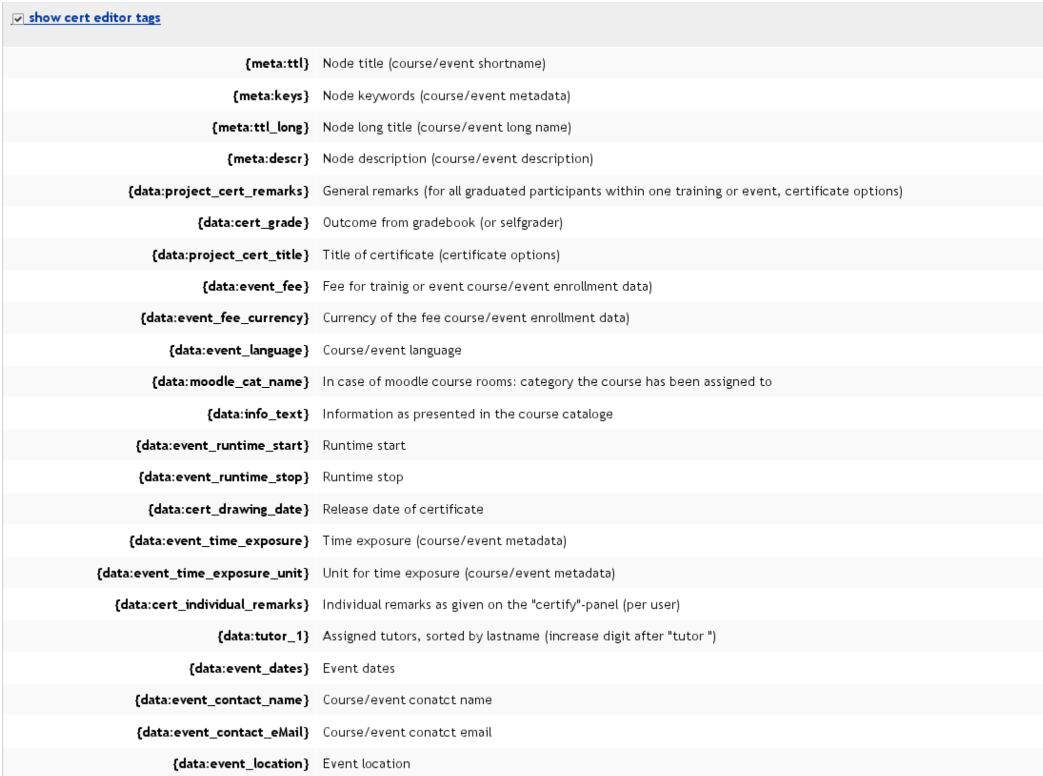


Fig.: Certificate editor WYSIWYG area

9.3.2 List of available placeholders

The template editor can interprete a set of variable expressions to refer to user or course data. You can get a list of all available placeholder by clicking on *show cert editor tags*:



show cert editor tags

{meta:ttl}	Node title (course/event shortname)
{meta:keys}	Node keywords (course/event metadata)
{meta:ttl_long}	Node long title (course/event long name)
{meta:descr}	Node description (course/event description)
{data:project_cert_remarks}	General remarks (for all graduated participants within one training or event, certificate options)
{data:cert_grade}	Outcome from gradebook (or selfgrader)
{data:project_cert_title}	Title of certificate (certificate options)
{data:event_fee}	Fee for trainig or event course/event enrollment data)
{data:event_fee_currency}	Currency of the fee course/event enrollment data)
{data:event_language}	Course/event language
{data:moodle_cat_name}	In case of moodle course rooms: category the course has been assigned to
{data:info_text}	Information as presented in the course cataloge
{data:event_runtime_start}	Runtime start
{data:event_runtime_stop}	Runtime stop
{data:cert_drawing_date}	Release date of certificate
{data:event_time_exposure}	Time exposure (course/event metadata)
{data:event_time_exposure_unit}	Unit for time exposure (course/event metadata)
{data:cert_individual_remarks}	Individual remarks as given on the "certify"-panel (per user)
{data:tutor_1}	Assigned tutors, sorted by lastname (increase digit after "tutor ")
{data:event_dates}	Event dates
{data:event_contact_name}	Course/event conatct name
{data:event_contact_eMail}	Course/event conatct email
{data:event_location}	Event location

Fig.: Certificate editor tags area

The following list contains all placeholders available in the standard configuration:

Placeholder	Description
{meta:ttl}	Node title (course/event shortname)
{meta:keys}	Node keywords (course/event metadata)
{meta:ttl_long}	Node long title (course/event long name)
{meta:descr}	Node description (course/event description)
{data:project_cert_remarks}	General remarks (for all graduated participants within one training or event, certificate options)
{data:cert_grade}	Outcome from gradebook (or selfgrader)
{data:project_cert_title}	Title of certificate (certificate options)
{data:event_fee}	Fee for training or event course/event enrollment data)
{data:event_fee_currency}	Currency of the fee course/event enrollment data)
{data:event_language}	Course/event language
{data:integrated OS-LMS_cat_name}	In case of online course rooms: category the course has been assigned to
{data:info_text}	Information as presented in the course cataloge
{data:event_runtime_start}	Runtime start
{data:event_runtime_stop}	Runtime stop
{data:cert_drawing_date}	Release date of certificate

{data:event_time_exposure}	Time exposure (course/event metadata)
{data:event_time_exposure_unit}	Unit for time exposure (course/event metadata)
{data:cert_individual_remarks}	Individual remarks as given on the *certificates*-panel (per user)
{data:tutor_1}	Assigned tutors, sorted by lastname (increase digit after "tutor ")
{data:event_dates}	Event dates
{data:event_contact_name}	Course/event contact name
{data:event_contact_eMail}	Course/event contact email
{data:event_location}	Event location

These placeholders will be replaced by individual records, when the individualized certificate is being generated (see *9.4 Generating individualized certificates*).

You can also copy an existing certificate template and change it according to your requirements. Use the *copy certificate* button at the left side beneath the certificate editor.

9.3.3 Copy and edit an existing certificate template

A convenient way to create a new certificate template is to reuse and modify exitsting templates. To copy an existing certificate template:

1. Go to *MyOdalis > adminCenter > Certificates* (at the time being)
2. Choose the certificate template you want to copy from the list in the content area.
3. Click the button „copy certificate“ on the bottom left side below the certificate editor and give a new name for the certificate copy.

NOTE: Certificate templates are nodes like any other pages within Odalis LMS; therefore you can find additional information in *7.3 Creating and editing categories and courses* e. g. how to move a certificate template to another folder if you have access to the main toolbar (see: *3.1 Control elements on the top of the page*)

9.3.4 Preparing MS Word or OpenOffice documents as certificate templates

Usually Microsoft Office or OpenOffice documents will be delivered to serve as a base for a certificate template. As it is not trivial to achieve the desired results (e. g. positioning of text) using the XHTML wysiwyg editor, the following description provides a simple way to create a certificate template. This solution is based on the idea to put all images and most of the text within a background image.

1. Start with a *MS Word* or *OpenOffice* template for you certificate.

2. Delete all textual information, which will not be dynamically inserted into the template by *Odalis LMS*; dynamical text is e. g. the participants name or the date of generation.
3. Generate a *PDF* using the *PDF* export of your word processor.
4. Open the *PDF* within a grafic programm such as *Adobe Photoshop* (or any other programm that can convert *PDF* to *JPEG*-Format)
5. *Photoshop* will ask in what size you want to rasterize the *PDF* document (*Photoshop* dialog box: *Rasterize generic PDF format*)
6. Choose 72dpi and save the opened document as *JPEG*. This will be your low resolution background image for the certificate preview.
7. Repeat the last step with a 300dpi resolution. This will be your high resolution background image for the final *PDF* version of the certificate.
8. Upload both images using the buttons *background image preview* and *background image printing* in the certificate editor (see *9.3.1 Create and edit a certificate template*)
9. Insert placeholders at the appropriate position within the certificate editor (see *9.3.1 Create and edit a certificate template*)

9.3.5 Preview of certificate template

A quick XHTML preview of the finished template can be generated by clicking the preview button on the bottom right side of the certificate template editor. A popup window will open, showing the template with test data if provided. See *9.3.6 Setting up a test record* for more informaton. The XHTML-editor does only show an aproximation to the final print layout.

Check the final layout by clicking *print pdf*. If there will be generated more than two pages allhough you do need only one, you will have to adjust the distribution of text until you will get the desired outcome. A PDF file will be shown within your browser. In case the browser is not configured to call an PDF viewer you will be offered to download the PDF file preview.

9.3.6 Setting up a test record

You can set up a test record to populate the preview with data:

- Switch to the to the edit mode (toolbar: icon or menu: *Edit > Edit Page*). You will then find a form, where you can add/change the record's values.
- Insert a placeholder (e. g. *{data:firstname}*) into the left column fields and the desired value into the right column fields of the form;
- click *Save and close config*

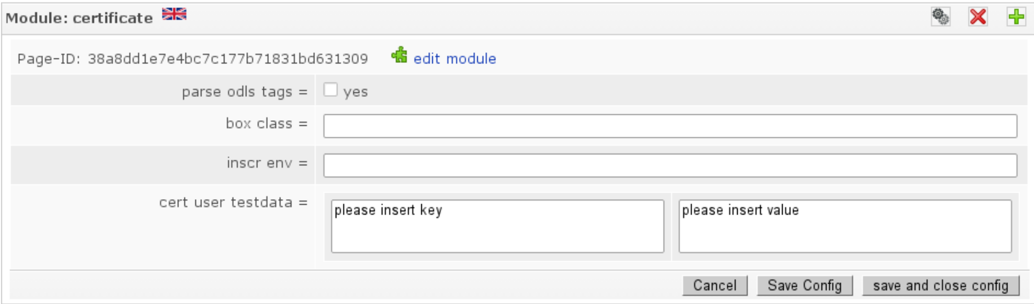


Fig.: In edit mode you can change the test record for the preview function within the certificate editor.

9.4 Generating individualized certificates

The generation of individual certificates involves the following steps:

- Go to the LPM and choose the online or on site training course, in which graded users should get a certificate.
- Choose the *certificates*-panel:

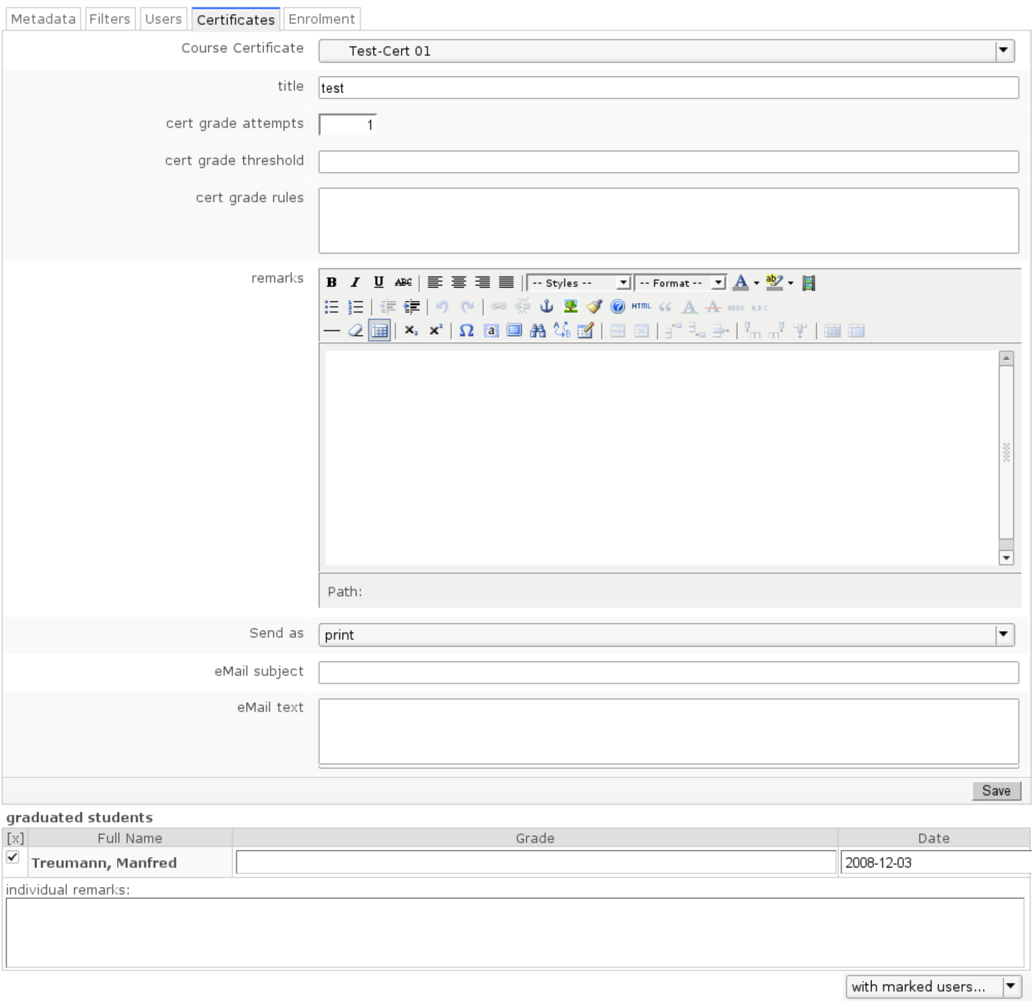


Fig.: Learning Project Management with *certificates*-panel.

- Assign a certificate to an online or on site training course: choose from the *course certificate* list. The list will show all certificate templates, which have been prepared.
- Insert a certificate title.
- Insert a value for *certificate passing score*, if you want the user to reach a certain outcome before he/she gets a certificate (irrespective of the fact, that the user is graded); this value has to be set according to the corresponding *gradebook* setting for the course resp. learning activity (e. g. points or percent). If you leave the field empty, the user can get a certificate as soon as he/she is graded (irrespective of the outcome).
- Fill in general remarks in the *remarks* field (linked to the certificate/course).
- Choose a distribution method (at the time being *email* or *print*).
- Fill in an *email subject* and *text*, if the certificates will be sent by mail.

After having completed these general steps you can choose graded students from the list below to receive an individualized certificate.

The column *grade* shows the outcome taken over from the *gradebook*. You can complete or coment the value (e. g. „Congratulations! You have reached 98%.“). If there is no numerical value, the field will be empty (e. g. in a read-only course with no quiz).

You can also personalize the certificate by filling in some individual remarks, which will be printed in the certificate, if the template contains a corresponding placeholder.

To generate and/or deliver the individualized certificates to the marked users choose an entry from the menu with marked users.

10 Delivering SCORM based WBTs

To deliver a WBT to your users including the automatic notification of users and the distribution of certificates requires several steps:

1. Create a new *online* course room (see *7.5 Create a New Online Course Room or Classroom Training*)
2. Prepare a certificate template, if not already available (see *9.3 Certificate template editor*)
3. Integrate *SCORM* package into the online course room (see this chapter)
4. Initiate automatic delivery of certificates (see *10.1.2 Initiate automatic delivery of certificates*)
5. Prepare responder, reminder and certificate notification (see *14 Notification emails (responder/reminder)*)

Some of these steps are more of general interest and have therefore been documented elsewhere (see the reference note).

This chapter will cover #3 and #4 of the list above, i. e. how to prepare the online course room, how to intergrate *SCORM* based WBTs and how to prepare the gradation mechanism.

10.1 Integration of SCORM Packages into a Online Course Room

As this issue is not an original *Odalis LMS* function, you should also consult the *integrated OS-LMS* documentation for further information; see the following resources:

- http://docs.moodle.org/en/SCORM

The following only describes *a possible example configuration*. The basic steps for integrating a *SCORM* package are:

- Visit the online course room
- Set the course settings (esp. the format to *SCORM format*)
- Insert and configure a *SCORM/AICC activity* and upload the *SCORM* package

After having created a new online course room, you can jump into the course room by clicking the integrated OS-LMS link on the *metadata*-panel of the *LPM*.

Once you are in the course room you will get a view similar to the following screenshot:

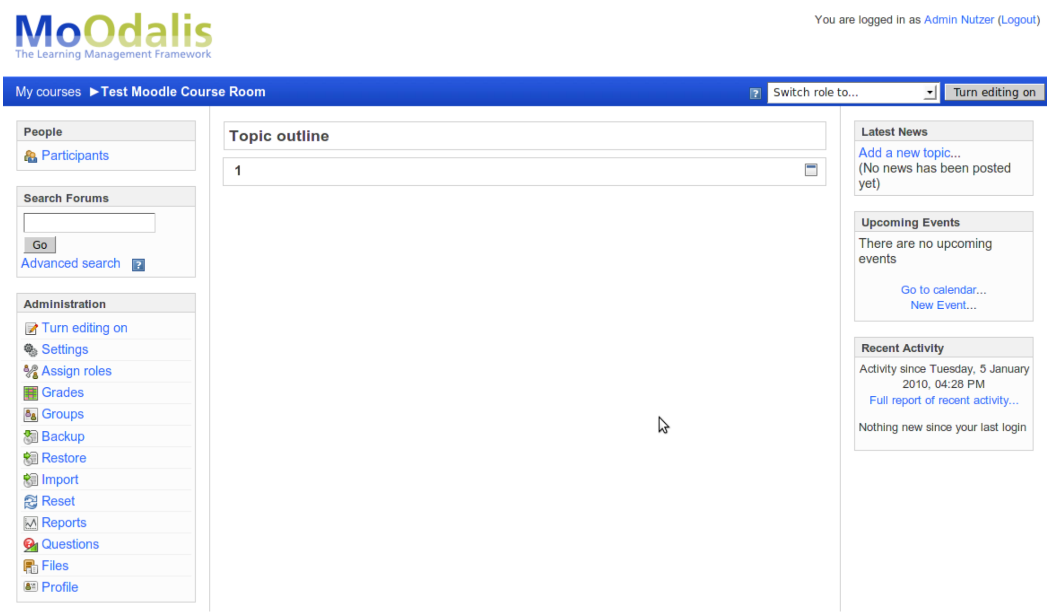


Fig.: Online course room after initial creation

Click on *Settings* within the *Administration* block on the side:

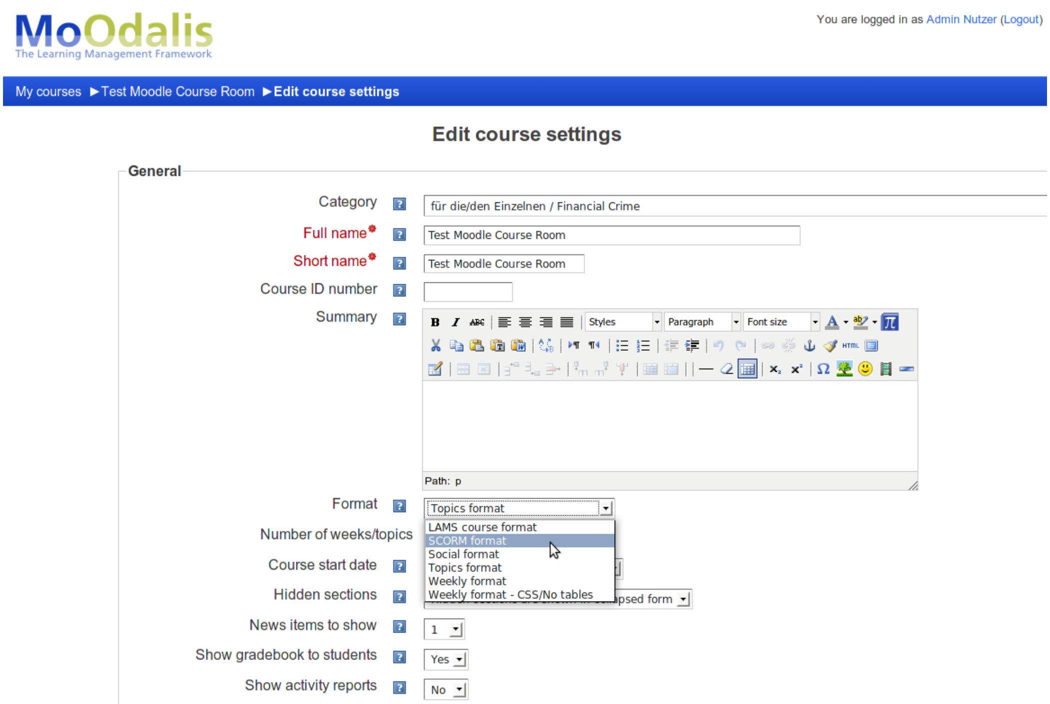


Fig.: Online course room settings

Change the option *format* to the value *SCORM format*. Choose *Save changes* at the bottom of the page. You will then be redirected to the *Adding a new*

SCORM/AICC page; if you do not see all the option as in the following screenshot, click the button *Show Advanced*:

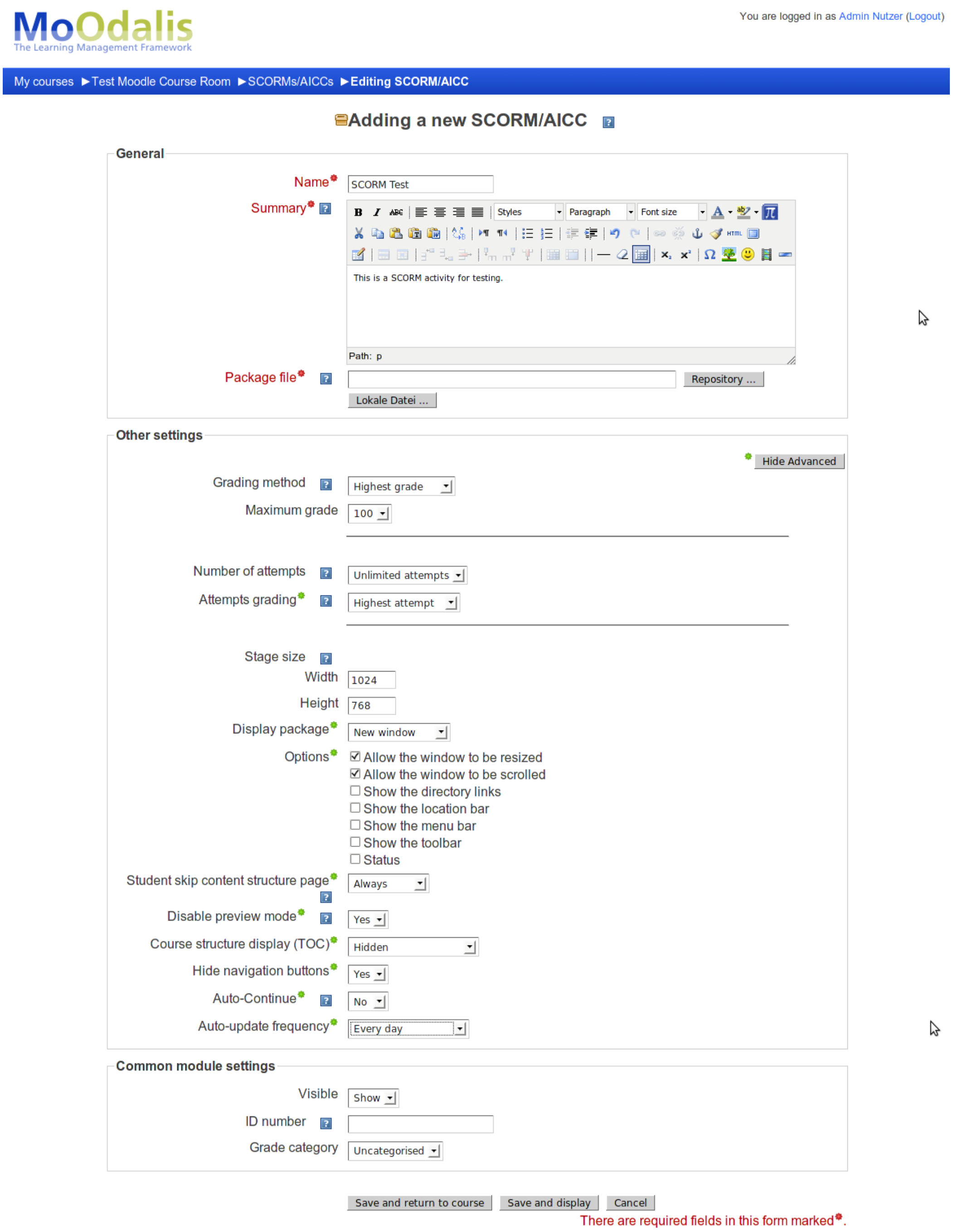


Fig.: Form to edit the SCORM/AICC settings

Fill in respective change the following settings:

Form field	**Value**
General	

Name	(choose a name for the WBT)
Summary	(provide a summary; this will be shown on the initial page once the user has entered the course room)
Package file	upload and/or choose a SCORM package; see above
Other settings	
Grading method	Highest grade
Maximum grade	100
Number of attempts	Unlimited attempts
Attempts grading	Highest attempt
Stage size Widh	1024 (resp. width of WBT as specified by supplier)
Stage size Height	768 (resp. width of WBT as specified by supplier)
Display package	New window
Options	Check „Allow the window to be resized“ and „Allow the window to be scrolled“; leave the other options unchecked
Student skip content structure page	Always
Diasble preview mode	Yes
Course structure display (TOC)	Hidden
Hide navigation buttons	Yes
Auto-Continue	No
Auto-update frequency	Every day
Common module settings	
Visible	Show
ID number	(can be left empty)
Grade category	Uncategorized

See the following resource for more detailed information:

- http://docs.moodle.org/en/Adding/editing_a_SCORM

10.1.1 Upload of SCORM package

A *SCORM* package contains several files archived as a zip file (e. g. *wbt.zip*). You have to upload this file to the webserver to integrate it into the online course room. The most convenient way is to use the upload form from the online course room.

On the *Add SCORM/AICC package* form (see screenshot above) click on the button *local file* near the option *Package file*; you will get the following or a similar view:

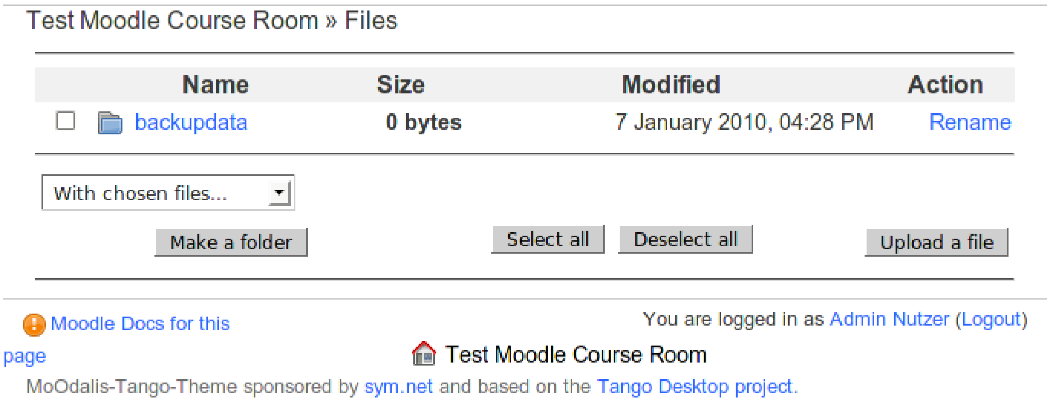


Fig.: Form to upload a SCORM package

Upload a file using the button *Upload a file*. You will have to select the file from your harddisk or a network drive. In case the upload limit is to small (you will get an error message while uploading), please contact your administrator to either increase the upload limit or to upload the *SCORM* package using an alternative way (e. g. FTP).

After the upload, you can select the *SCORM* package by clicking *Choose* next to the file you would like to be integrated into the course room (within the following screenshot e. g.: *scorm-wbt.zip*):

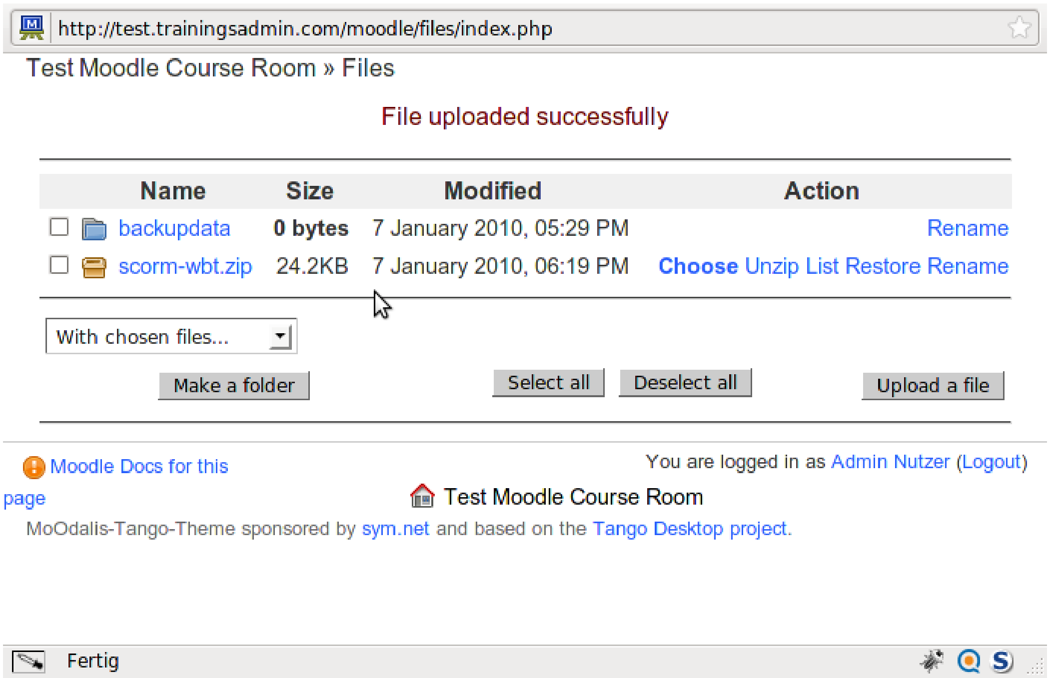


Fig.: Choose an uploaded file by clicking *Choose*

You will then be redirected to *Add a SCORM/AICC package* page. Leave the form by clicking the button *Save and return to the course* at the bottom of the page.

10.1.2 Initiate automatic delivery of certificates

In certain cases user should be automatically certified and get a certificate once they have reached a defined result. The WBT will track the users activity (viewing pages or attending tests) and send these data to the Odalis LMS system. If the defined passing score is reached (e. g. 70%) the user will become graduated and e. g. get a certificate by email.

To initiate the automatic delivery of certificates complete the following steps:

- Set up a selfgrader in the online course room as described in *9.2.1.1 Using the Selfgrader Activity in the integrated OS-LMS*
- Go then back to the LPM
- Go to the *certificates*-panel of the online course
- Check the checkbox *Allow selfgrading*
- Provide a value for *Passing Score* (please contact the supplier of the WBT, in case you do not know, what sort of value and unit the delivered *SCORM* package sents to the *integrated OS-LMS*; usually this will be a percentage value e. g. 70%); insert only the number value e. g. 70 in case the
- You can leave the (advanced) option *Grade Rules* empty
- Choose one option from *Autosent As* e. g. *email attachement*
- Save the panel

11 Polls

Usually the completion of online and/or classroom training courses involves the feedback of the attendees, the trainers and possibly other parties. Odalis LMS provides a poll module to set up custom polls and collect feedback data. The poll module consists of three components:

1. A *poll question database* to create, store and administer a collection of questions.
2. A *poll form database* to create, store and administer poll forms
3. The *feedback-panel* in the *LPM*, where you can connect an online or classroom training course to a specific poll form.

Usually you will find the question and poll form database in the *adminCenter > Polls > Forms DB* and *adminCenter > Polls > Forms Question Db*:

NOTE: This location of the poll database applies to the standard system setup. Customized system setup might deviate more or less.

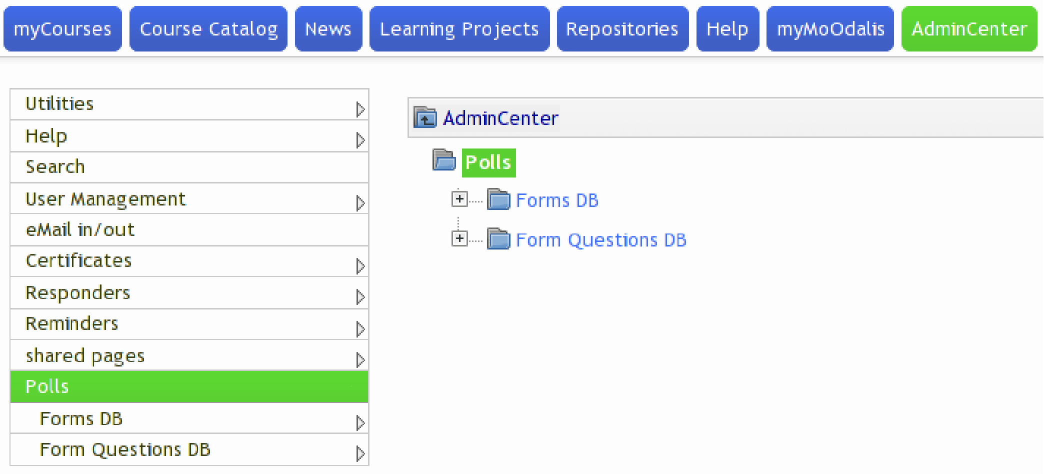


Fig.: Poll-Module in the *AdminCenter*

11.1 Poll Questions

Choose the *Form Questions DB* link to get a standard list view of the already existing questions:

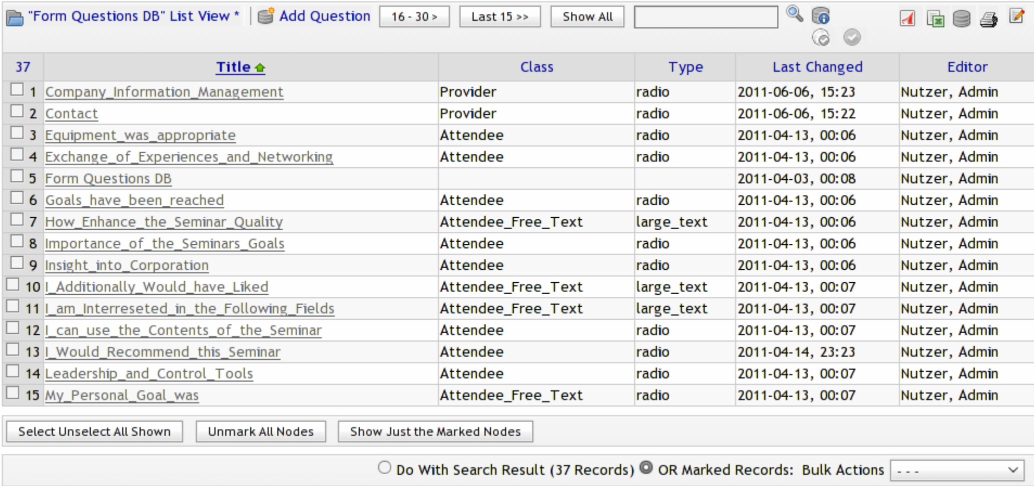


Fig.: List view of the questions database

The standard view displays the follwing information:

Column Name	Description
Title	Title of the question; identifier, that can freely be choosen, when creating the question
Class	Category to group questions internally
Type	Widget type of the question
Last Changed	Last date of modification
Editor	Last editor

11.1.1 Add and Edit Poll Questions

To add a question click on the *Add question*-button at the top of the questions database list view:

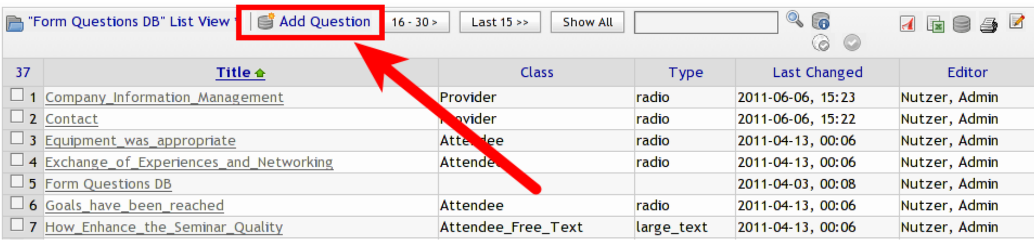


Fig.: Add a new question

First you will be prompted to give a descriptive title:

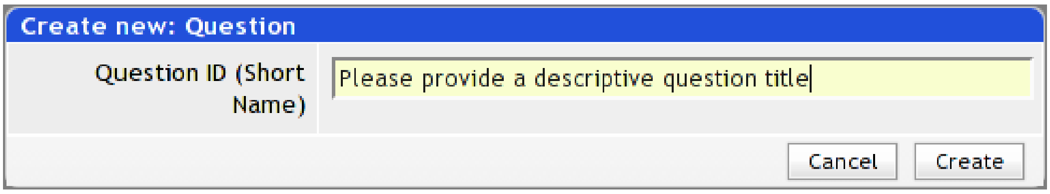


Fig.: Insert a short but descriptive question title

After having created a new question entry you will be offered several options to specify content and presentation of the question:

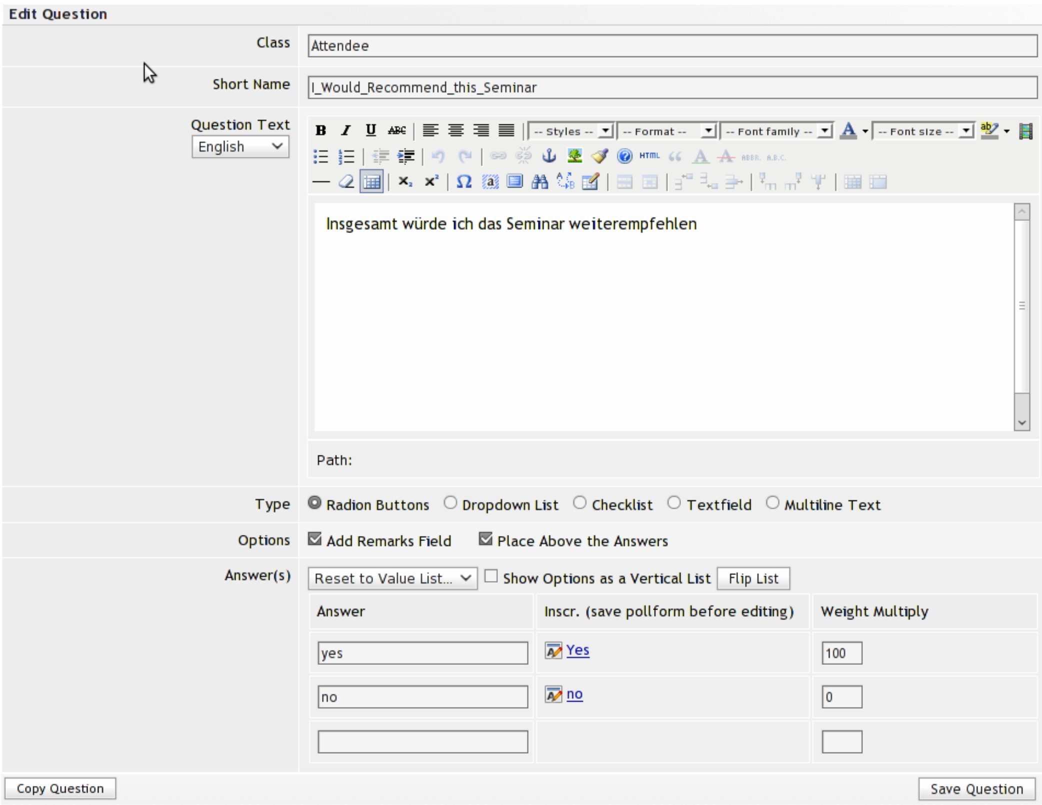


Fig.: Standard form to create and specify a new question

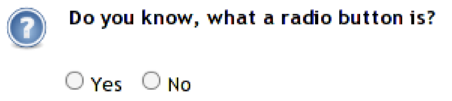
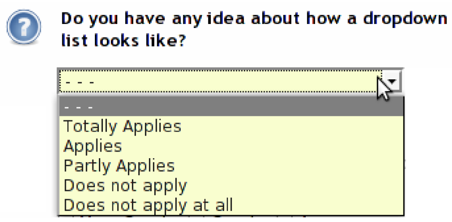
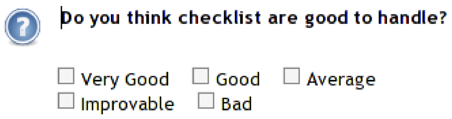
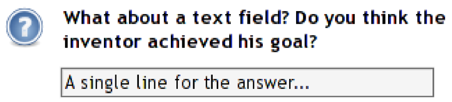
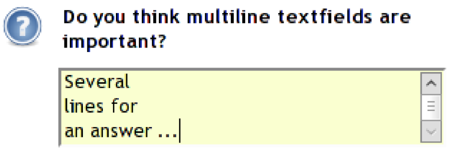
The following description only applies to the standard system setup. Customized system setup might deviate more or less.

You will find the following options:

Field Name	**Description**
Class	Category to group questions internally
Title	Title of the question; identifier, that can freely be choosen, when creating the question or modified at any time afterwards
Question Text (language selector)	The language selector presents a set of preconfigured languages; choose the language to edit its content in the editor field
Question Text (editor)	WYSIWYG-editor to insert and formate the question text
Type	widget type of the question; for a detailed explanation see *11.1.1.1 Poll Question Widget Types*
Add Remarks Field	Add extra field for free text remarks linked to the current question; field will be printed below the answers

Place Above the Answers	Position extra field for free text remarks *above* (not below) the answers
Answer(s) – Reset to Value List	Use this dropdown right from the start to choose from a list of preconfigured answers or, in case you started with self-created options, to discard your answers by choosing one of the preconfigured value lists
Answer(s) – Show options as vertical lists	Formate answers vertically instead of horizontally
Answer(s) – Flip list	Example: Print: [ ] No [ ] Yes Instead of: [ ] Yes [ ] No
Answer	Create, edit, translate and set values for the evaluation of the poll; see *11.1.1.2 Create, Edit, Translate and Score Poll Answers*

11.1.1.1 Poll Question Widget Types

Type	**Description**	**Screenshot**
Radio	Either-Or-Choice; user can not mark more than one button	
Dropdown	User can choose on option from a menu list; ususally the best choice if the options contain more than 2 words	
Checklist	User can mark more than one option	
Textfield	Free text, only one line	
Multiline Textfield	Free text, multiple lines	

11.1.1.2 Create, Edit, Translate and Score Poll Answers

Usually poll questions are related to a set of answers. These ansers can either be customized or provided by a preconfigured set (value list). Furthermore an answers (and questions) can be localized and each answer can be given a specific weight for later evaluation.

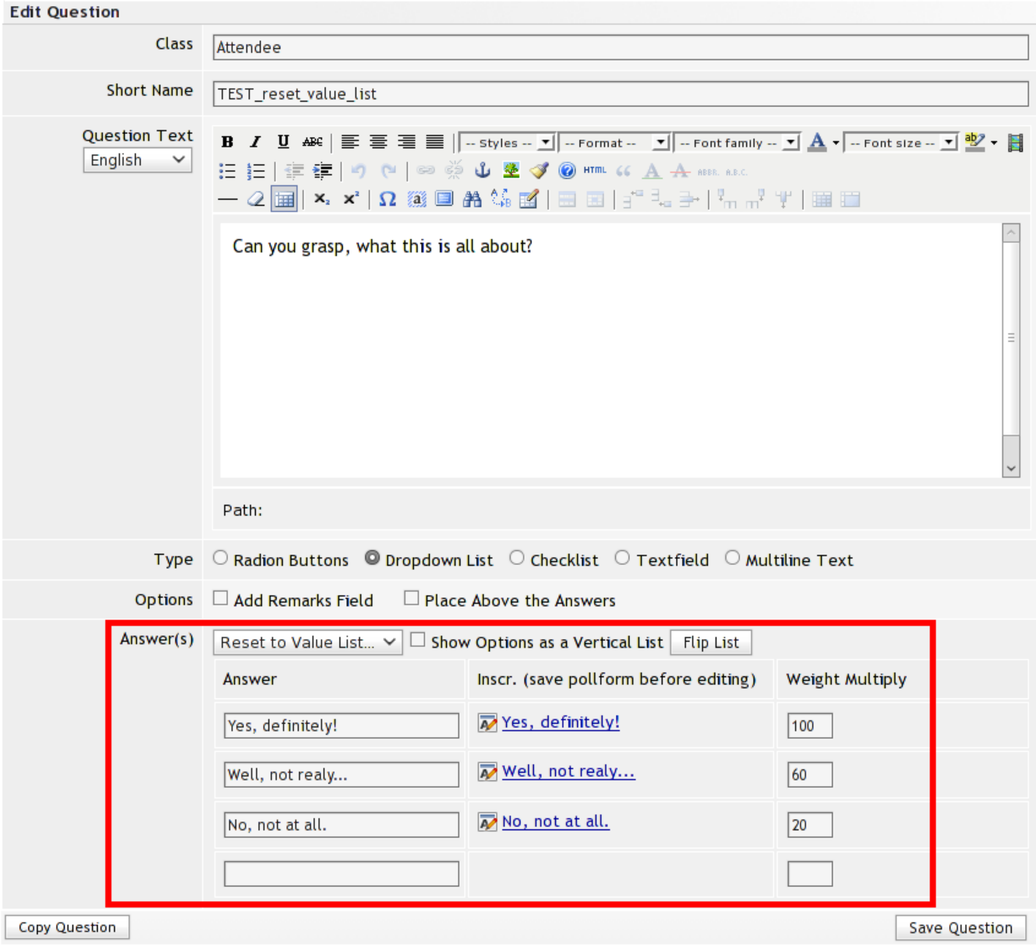


Fig.: Area to edit answers and set options

11.1.1.2.1 Set Up Custom Answers

You can setup custom answers as demonstrated in the following screenshot. Each time you save the form by clicking the *Save Question*-button you will get a new empty field for another answer. Similarly if you delete an entry for an answer (e.g. „No, not at all.“) and save the form, this answer will be removed:

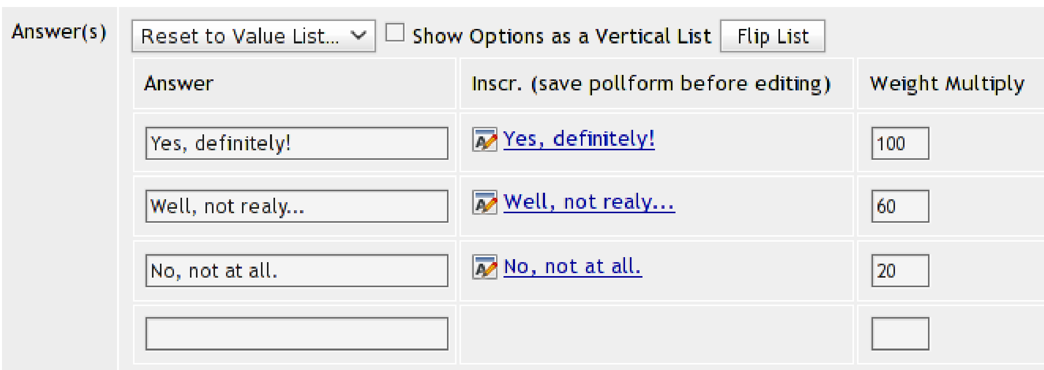


Fig.: Area to edit answers and set options in detail

To localize the answer save the form and click on the link near the inscriptor icon to open the inscriptor editor:

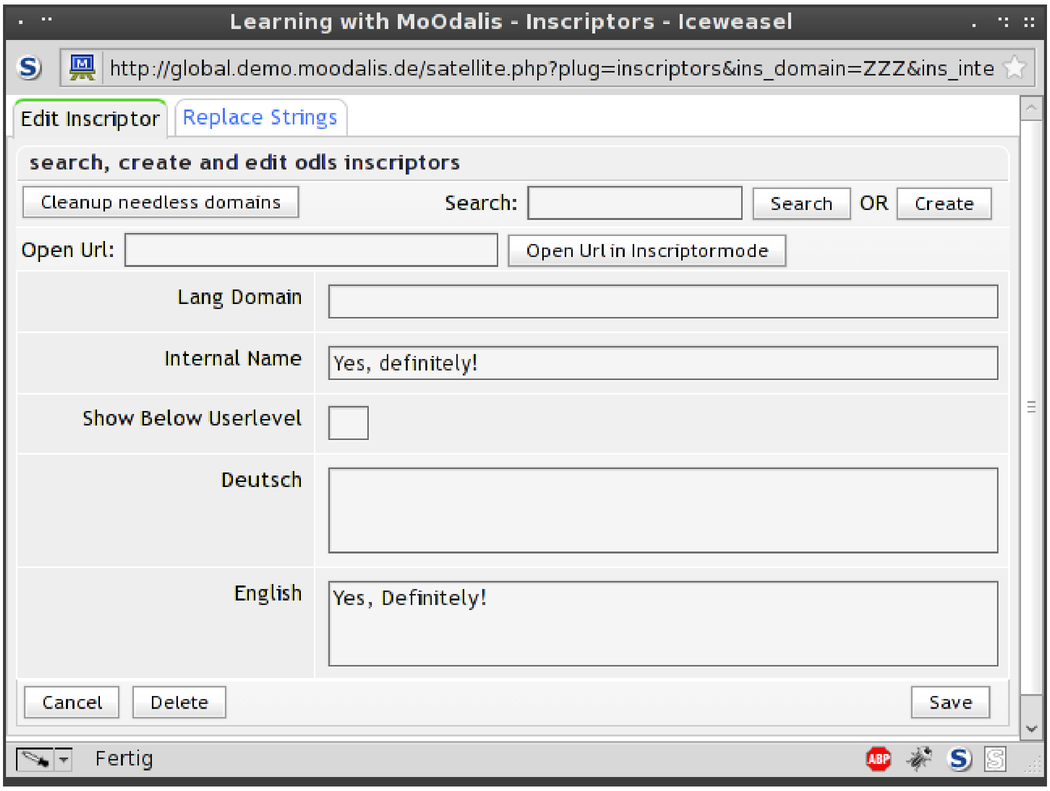


Fig.: Inscriptor editor to localize answers for a poll form

The answer text you have initially provided will populate two fields:

- *internal name* and
- *language field* for the default language (= *English*)

You can edit the English wording as well as provide the German translation. The *internal name* will not appear in the interface but is only a referent for the different language versions.

For more a more detailed information about inscriptors see *16.1 Interface labels*. Close the inscriptor window after you have saved any changes.

Finally you can give a value for any answer used for the automatic evaluation of poll forms. The possible value steps depend on the number of answers and do always refer to the total of 100 (%):

Number of Answers	**Values**
2 (yes/no)	0, 100
3	0, 50, 100
4	0, 33, 66, 100

5	0, 25, 50, 75, 100

During the automatic evaluation of the poll form these values will be multiplied by a factor, that scores each question in comparison to the other questions in the poll form. See *11.2.2 Set Up a Poll Form* for more details.

[Example of evaluation]

11.1.1.2.2 Use Preconfigured Answers

Instead of providing customized answers you can choose one of the prepared value lists.

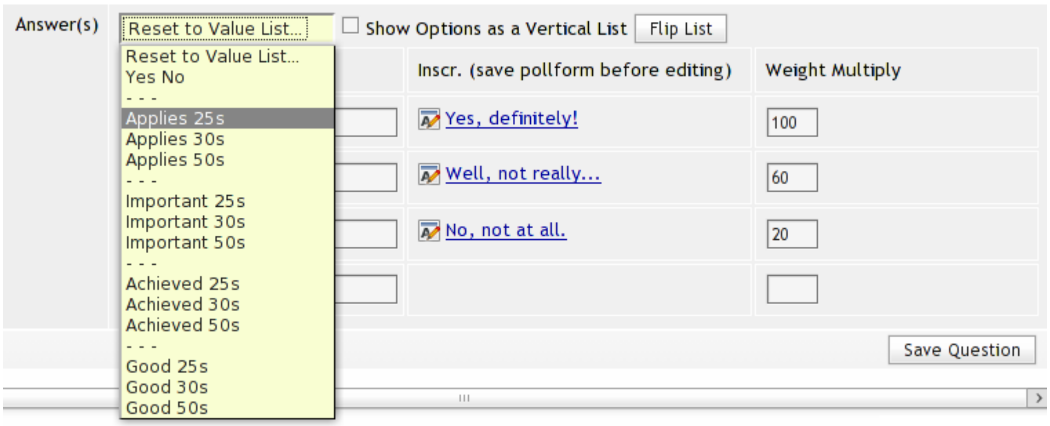


Fig.: Default value lists with preconfigured answers

The following lists are available by default:

Value Liste	**Answers**	**Values**
Yes No	Yes No	1 0
Applies 25s	Totally Applies Applies Partly Applies Does not apply Does not apply at all	100 75 50 25 0
Applies 33s	Applies Partly Applies Does not apply Does not apply at all	100 66 33 0
Applies 50s	Applies Partly Applies Does not apply at all	100 50 0
Important 25s	very important important partly_important not important	100 75 50 25

	not important at all	0
Important 33s	very important important not important not important at all	100 66 33 0
Important 50s	very important important not important	100 50 0
Achieved 25s	was achived completely was achived was partly achieved was not achieved was not achieved at all	100 75 50 25 0
Achieved 33s	was achived completely was achived was partly achieved was not achieved	100 66 33 0
Achieved 50s	was achived was partly achieved was not achieved	100 50 0
Good 25s	very good good average improvable bad	100 75 50 25 0
Good 33s	very good good improvable bad	100 66 33 0
Good 50s	very good good bad	100 50 0

11.1.2 Copy Poll Questions

To copy a question use the copy button:

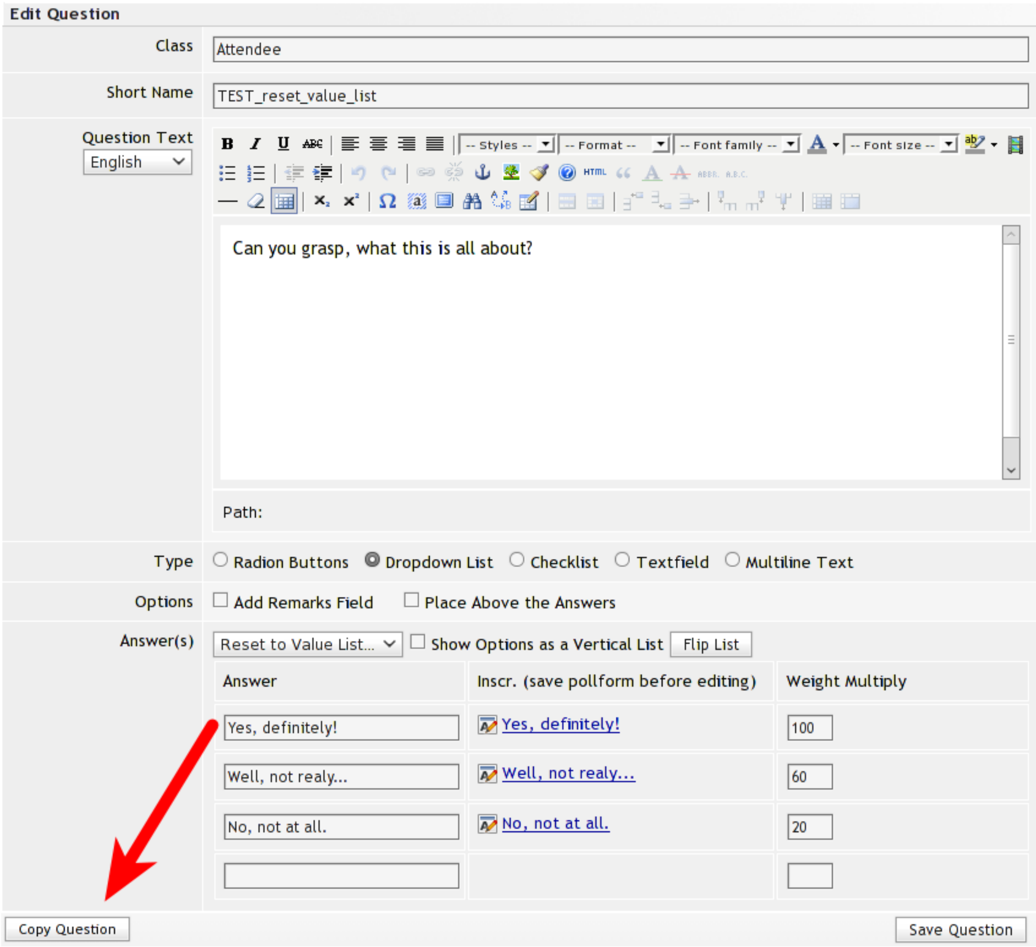


Fig.: Use the *Copy*-button to copy an already existing question.

11.2 Poll Forms

Based on the poll question database you can set up poll forms to be used in connection with online and classroom training courses.

Choose *AdminCenter* > *Poll* > *Forms DB* link to get a standard list view of the already existing poll forms:

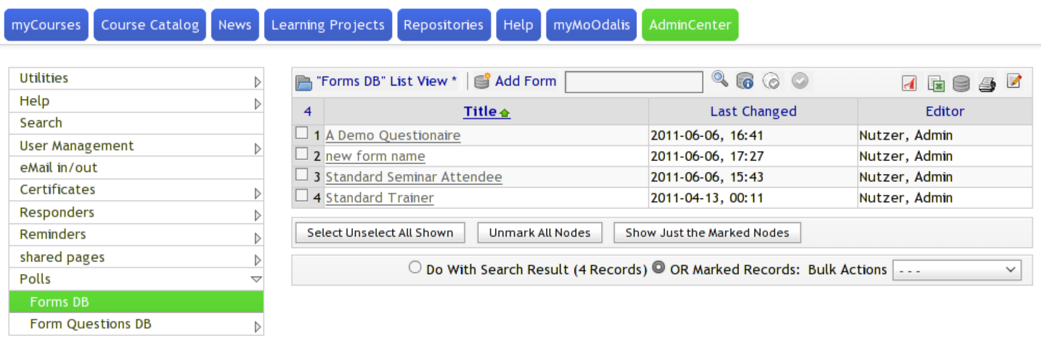


Fig.: List view of the poll forms database

The standard view displays the follwing information

Column Name	Description
Title	Title of the poll form; identifier, that can freely choosen, when creating a form
Last Changed	Last date of modification
Editor	User of last modification

11.2.1 Add Poll Forms to the Database

To add a new poll form click on the *Add Form*-button at the top of the forms database list view.

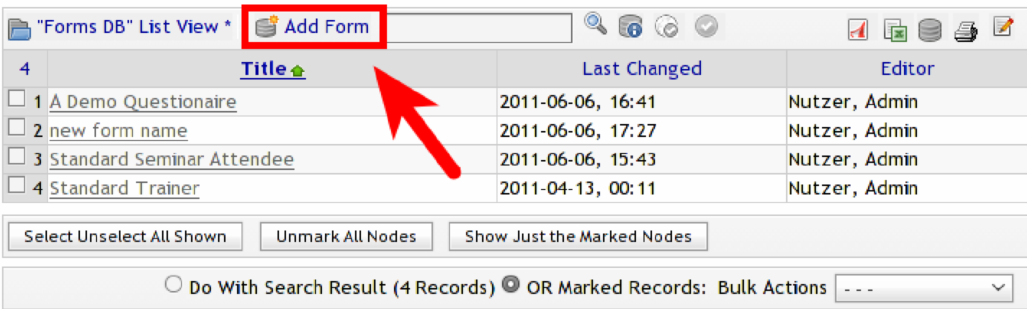


Fig.: Add a new poll form

First you will be prompted to give a descriptive title:

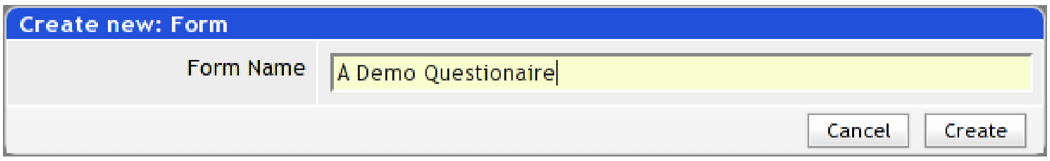


Fig.: Insert a short but descriptive poll form title

After having created a new form entry you will be offered several options to specify the contained questions, informational text, structure and some other options of the poll form:

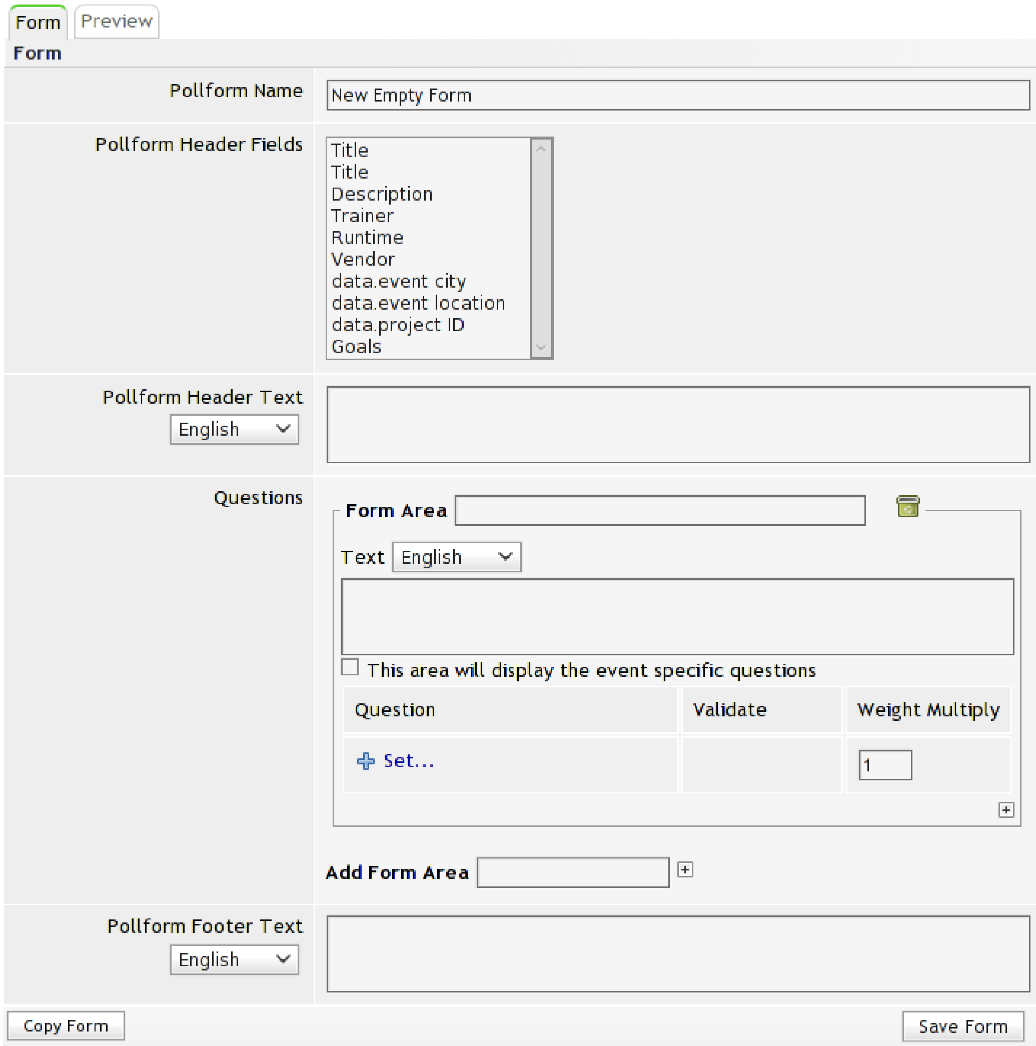


Fig.: Standard form to create and specify a new poll form

The following table gives an overview of the available featues and functions when setting up a new poll form:

Area / Field	**Description**
Pollform Name	Descriptive name of the poll form
Pollform Header Fields	Specified data will be displayed on top of the poll form as information for the user
Pollform Header Text	Text will be displayed in the header of the poll form; use the language switch to choose the desired language
Questions	Questions to be included in the poll form; can be structured in different form areas. See *9.3.6 Setting up a test record* and *11.1.1 Add and Edit Poll Questions*
Pollform Footer Text	Text will be displayed in the footer of the poll form; use the language switch to choose the desired language

See an example of a possible poll form to get an idea about the different elements and their use:

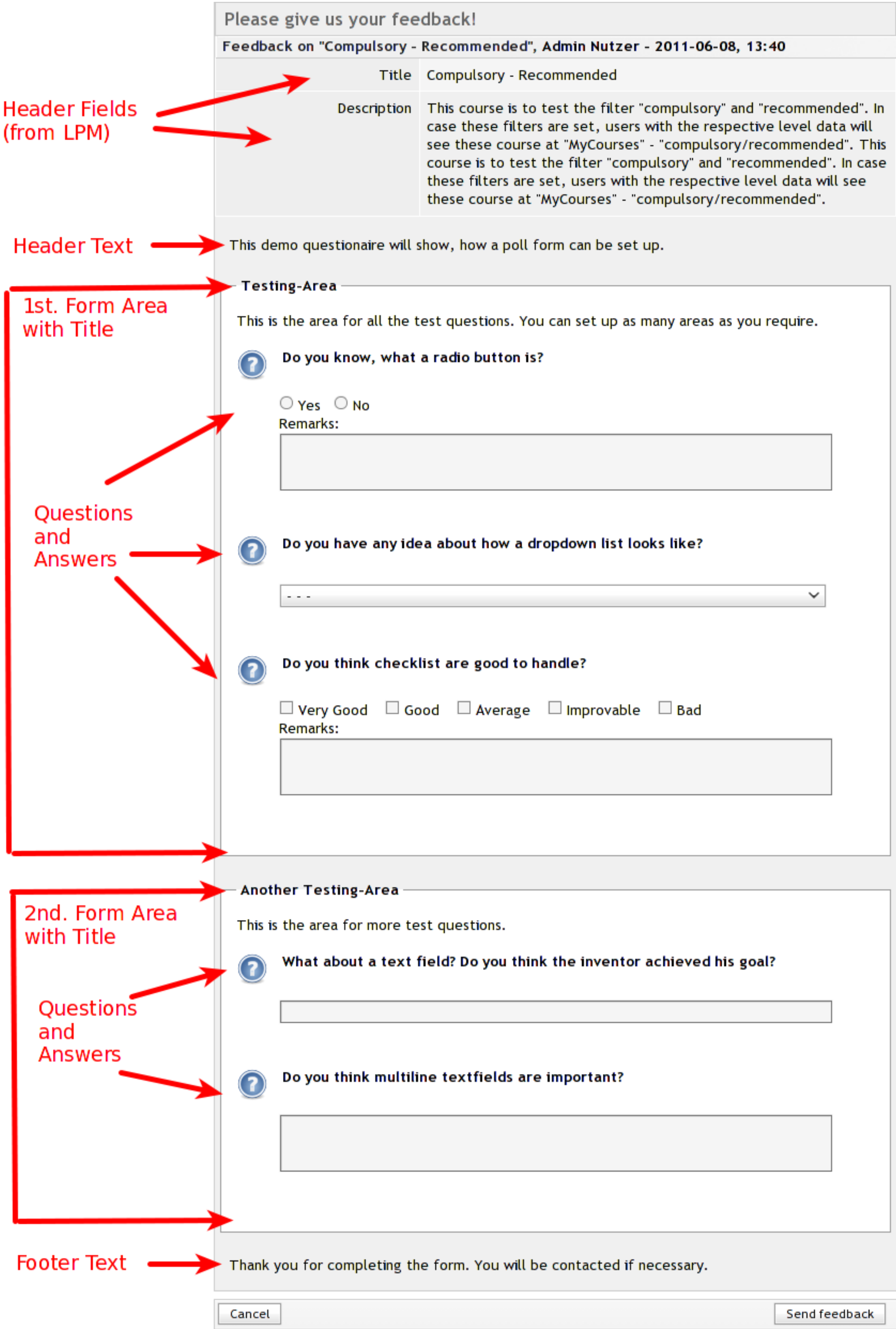


Fig.: Example form with explanations

11.2.2 Set Up a Poll Form

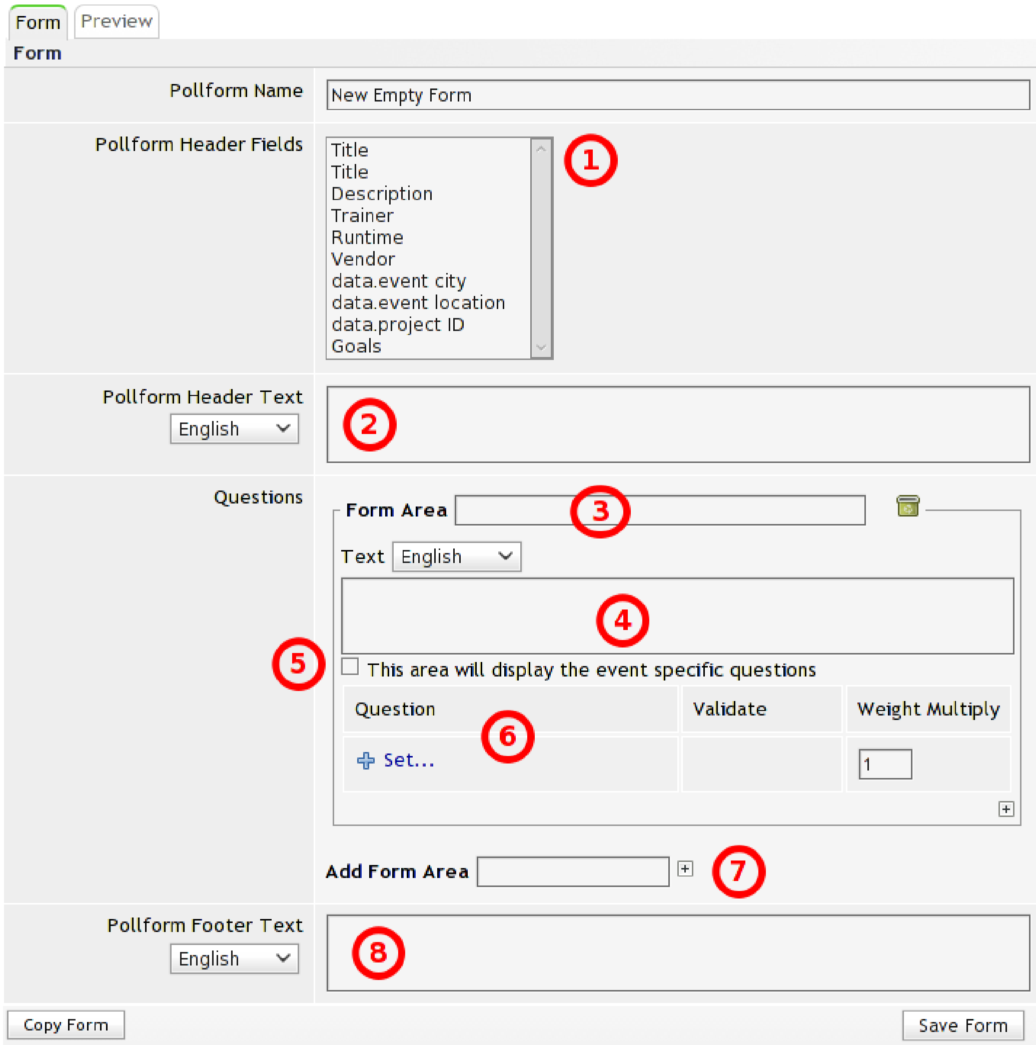


Fig.: Set up of a poll form; see the following list for explanations.

Perform the following steps to set up a poll form:

1. Choose header fields to be displayed in the head of the form; the data for these fields comes from the *LPM* and provides information about the training in order to give the user some context for the feedback request.
2. Add some text to the *pollform header text* field in order to introduce the users to the feedback request or leave the field blank. If you are dealing with a multi-language systems do not forget to provide the same text in all necessary languages. Use the dropdown to switch languages.
3. Provide a title for the form area; usually a form consists of several areas such as e. g. *general questions*, *questions* related to the *training* and to the *organisation* a.s.o. *Areas* and *area titles* provide a way to structure the form according to you needs.

4. If desired provide a text related to the form area printed below the title. If you are dealing with a multi-language systems do not forget to provide the same text in all necessary languages. Use the dropdown to switch languages.
5. If the current area should contain a category- or event-specific form area, do check this box. Please see *11.2.4 Category- And/Or Event-Specific Form Areas* for details.
6. Add questions as described in the following chapter *11.2.2.1 Add or Replace Questions*.
7. If needed, add another form area; to do so click the plus-icon. Continue with step #3 of this list to prepare the new form area.
8. Add some text to the *pollform footer text* field in order to give some additional information for the user or leave the field blank. If you are dealing with a multi-language systems do not forget to provide the same text in all necessary languages. Use the dropdown to switch languages.

11.2.2.1 Add or Replace Questions

NOTE: In order to add questions to the form you will have to set up the questions in the first place as described in *11.1.1 Add and Edit Poll Questions*.

- To add questions to a poll form turn to the *questions* area. First set up the title and text as described above (see *11.2.2 Set Up a Poll Form*).
- Click the add-item-link with the blue plus-icon labeled *Add ...* to add a questions from the question-database.
- Click any already added question title to replace it with another question from the question-database.

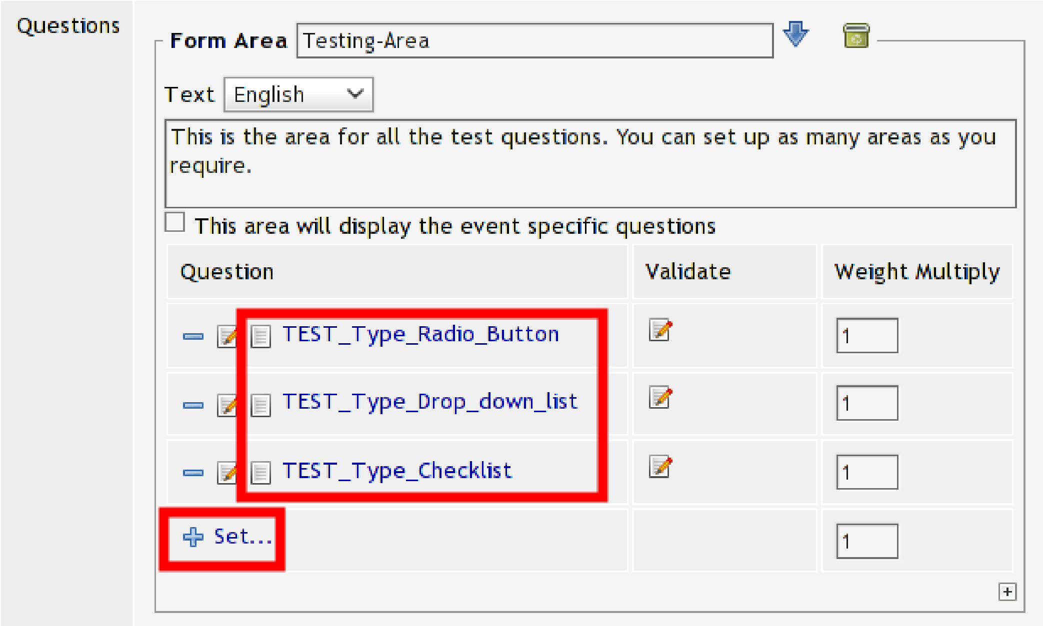


Fig.: Add a question by clicking the add-icon-link labeled *Set...*; replace a question by clicking the question-title you want to replace.

You will get the *node selector* with a list of all questions in the question-database:

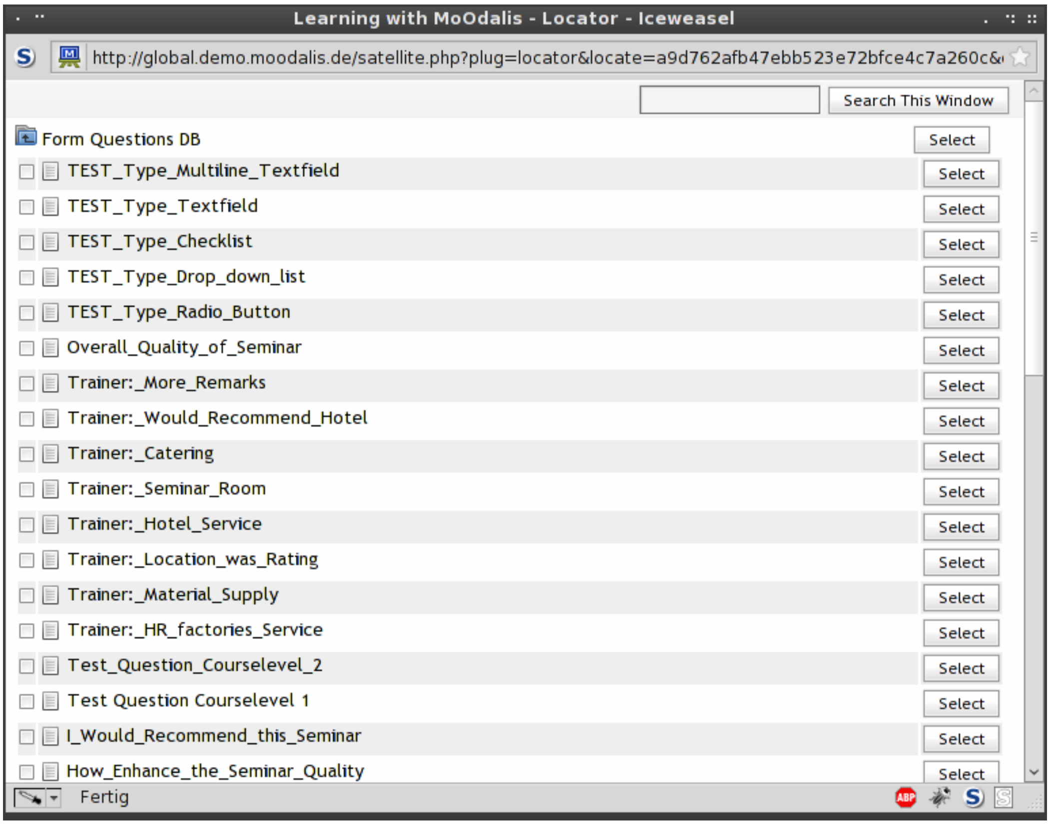


Fig.: The node selector showing a list of all available questions

Click the *Select*-button to choose the desired question.

11.2.2.2 Remove Questions

To remove a question from the form click the blue minus-icon labeled with the name of the question.

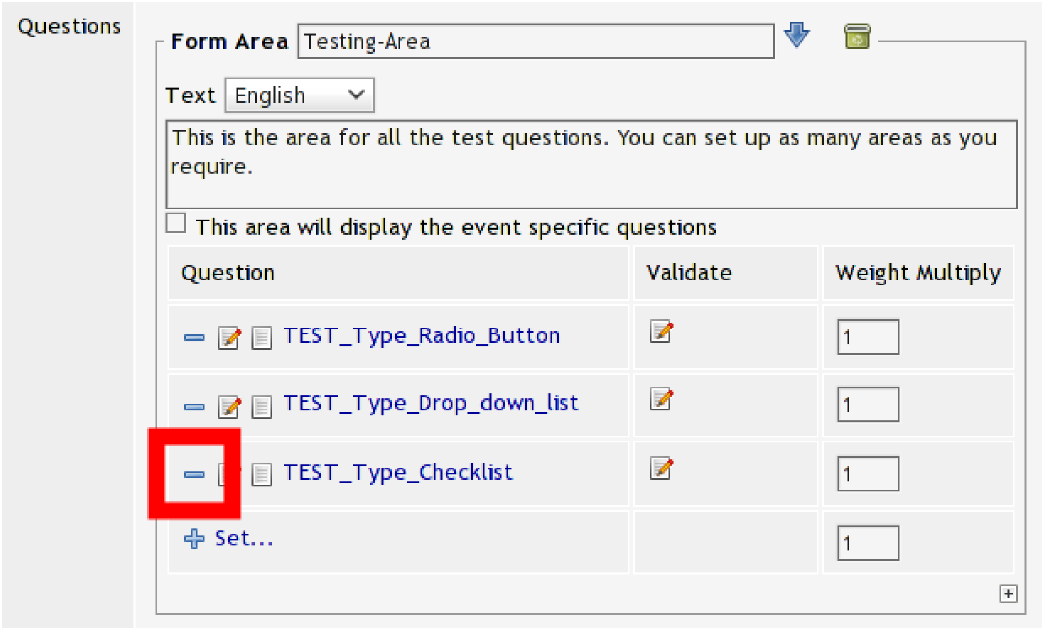


Fig.: To remove a question from the poll form use the blue minus-icon.

11.2.2.3 Set Validation Rules for Questions

You can set validation rules for any answer you provide within the form. These rules can be very complex, if necessary. Click the edit-icon in the column *Validate*; this will open the views-editor. Usually it will suffice to set two options:

1. The input should be checked according to the fuzzy (checks the input for security-related issues) and
2. set the field to be required, in case the answer is mandatory.

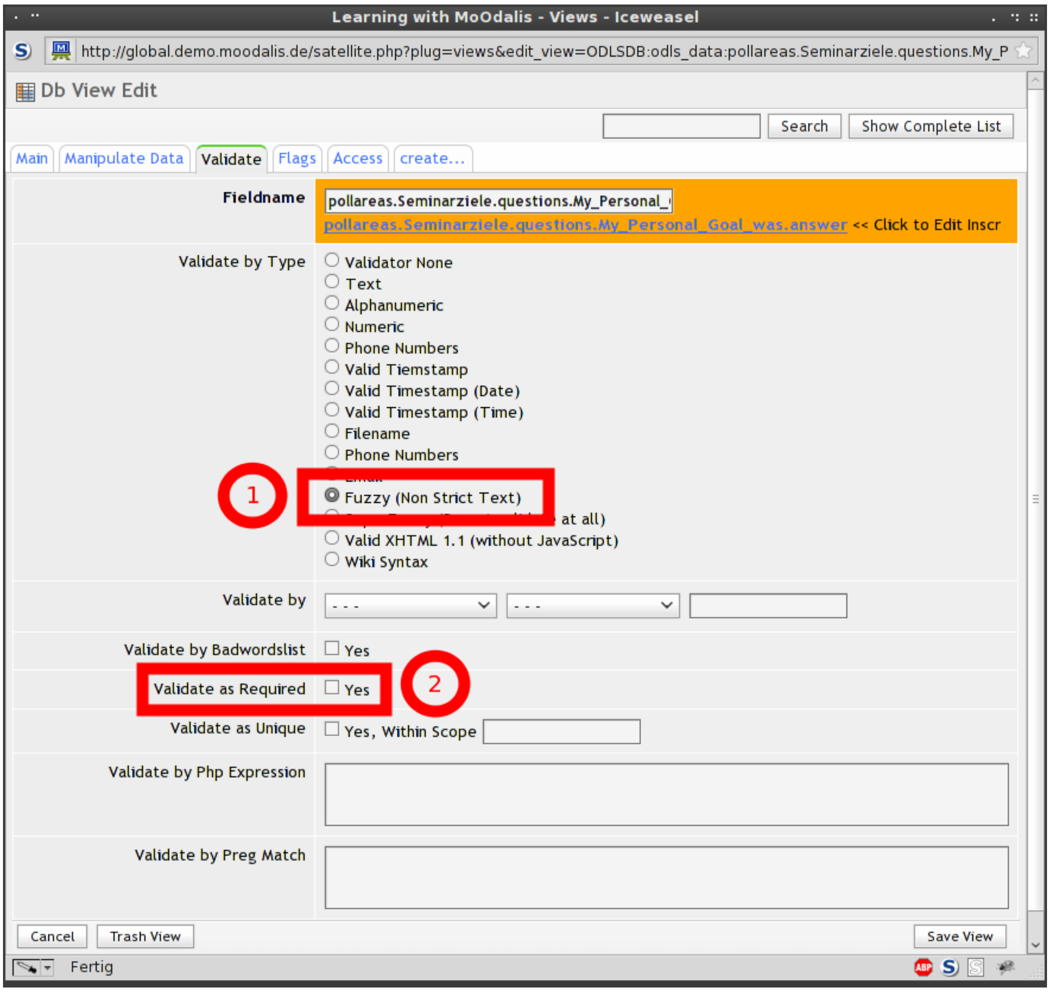


Fig.: The views-editor allows to configuration options for the validation of form fields such as the answer fields in a poll form.

In case a more sophisticated validation is needed, please consult you administrator or your Odalis LMS service provider.

11.2.2.4 Set Weight for Questions

Finally you can give a value for any question for the automatic evaluation of poll forms. This value labeled *Weight Multiply* will be multiplied with the value attached to the specific answer, that was given in the feedback (see *11.1.1.2.1 Set Up Custom Answers*). If all questions should be scored the same way, the *weight multiply* should also be the same (e. g. 1). If a question should be scored twice as much as the others you could set a *weight multiply* of 2:

11.2.3 Attach a Poll Form to an Online or Classroom Training

In order to offer a poll form to your users you have to attach an existing form template to an online or classroom training:

Go to the *LPM* and the training where you would like to add a poll form. Choose the *feedbacks*-panel.

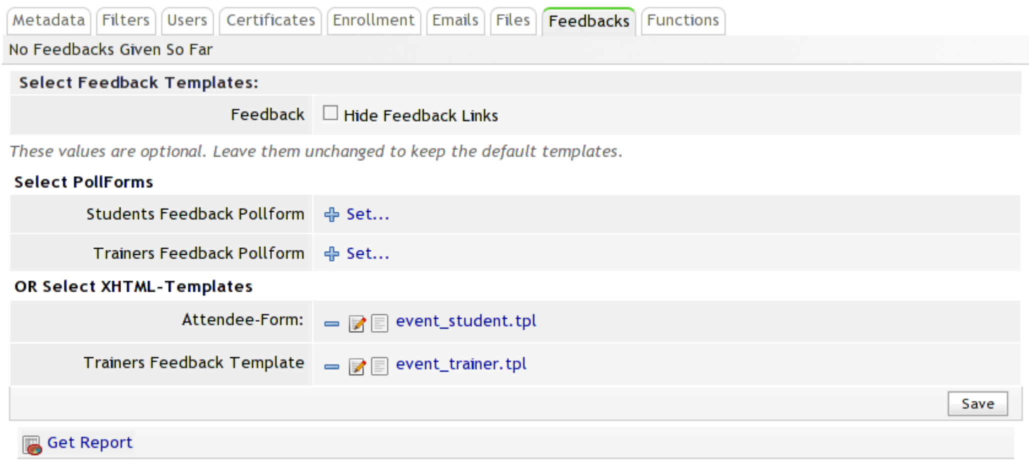


Fig.: You can attach a poll form to a training on the feedback panel in the *LPM.*

Mark the checkbox *Hide Feedpack Links* if you do *not* need any feedback for this training.

Below the heading *Select Poll Forms* click on blue plus-icon ✚ labeled *Set ...* for students or trainers and choose one of the offered poll forms:

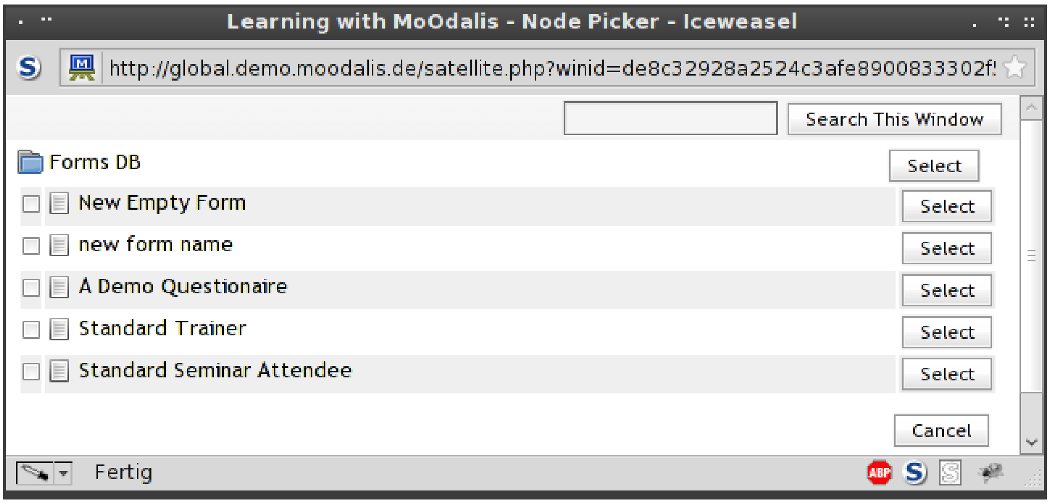


Fig.: The node selector showing a list of all available poll forms.

Besides the option to use poll forms created by using the poll form module, you can also setup forms using XHTML-templates. Please consult you administrator for more information.

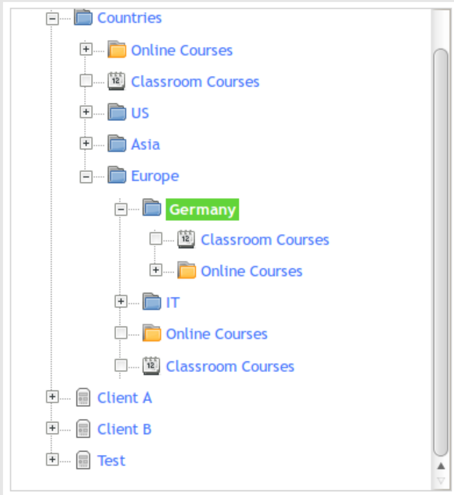
11.2.4 Category- And/Or Event-Specific Form Areas

As described you can set up a complete form with several question areas in the poll form database.

There is an additional option to create a form area with questions which are specific to a category resp. all trainings conained within this category.

A category – depending on you requirements and configuration – can represent a country, a venue, a special type of events or any other kind of grouping.

EXAMPLE: Let us assume you have a worldwide training structure according to company branches in US, Asia and Europe. Furthermore the trainings are grouped according to countries. If you need your poll forms to include country specific questions sets you can set up a poll form area on the country specific category such as Germany as in the screenshot:



The option for event specific questions allows to create global feedback forms and include form parts which present questions only for such a specific group of online or classroom trainings. Check the option „This area will display the event specific questions“ while creating a poll form.

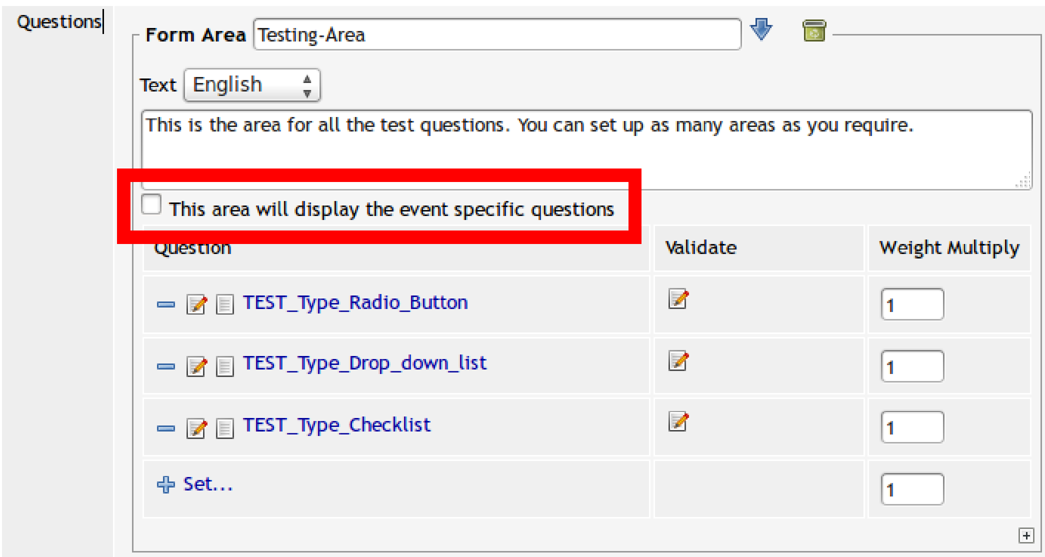


Fig.: Check the option *This area will display ...* to include a form area which is definded at category or event level.

To setup a form area with event specific questions go to the *LPM* and here to the category where you need to have available a specific set of question.

With reference to the example above you would go to the feedback panel of the category called *Germany*:

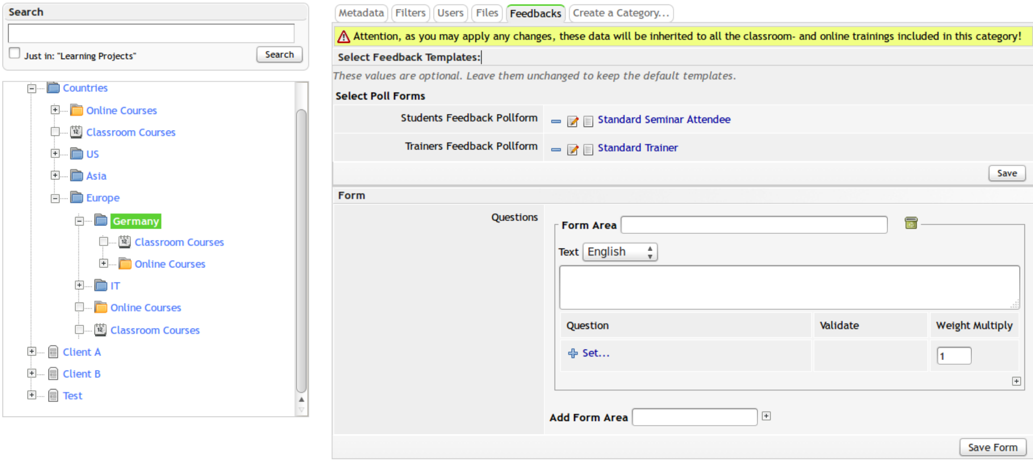


Fig.: The feedback panel at category level provides the option to set up question sets for all subcategories resp. trainings below the current node.

Add, remove or modify questions within this area as described in *11.2.2.1 Add or Replace Questions*.

12 Reporting

The reporting engine provides quantitative analyses of users' statuses and results with respect to online and classroom training courses as well as all other events in the *project tree*.

1. Odalis LMS comes with a predefined set of reports (*templates*), which can be made available for different user roles (e. g. local administrator) at a certain level of the *project tree* meaning for certain single nodes or a selection of nodes.
2. Furthermore these predefined report templates can be modified with respect to several parameters. You can save an existing report as a variant and e. g. change the column order, the fields displayed or apply filters, to get a refined report.
3. Finally the set of available reports can be extended for customizing the system adding new *PHP*-based reporting templates. This can usually be done with assistance of your implementation partner.

12.1 Standard Reporting Templates

A standard template can be

Report Label	**Description**
Event Attendance	All users with status *attended*
Latest enrollments	Enrollments since last report
Certified Learners	All users with status *certified* and *graduated*
Not (yet) Certified	All users with status not *certified*
Current enrollments per Training Vendor	All enrollments sorted according to metadata field *vendor*
Events (overview)	All events including summarized enrollment data (online and classroom training course)
Events (details)	All events (online and classroom training courses) including current enrollments in detail
Latest Cancellations (by attendee)	Self cancellations since last report
Latest Cancellations (by admin)	Cancellations by admin since last report
No Show	All users with status *noshow*
System emails	Notifcations triggerd by enrollment workflow
Emails to the Workscouncil	Emails to Workscouncil
Student Feedback	Odalis LMS internal feedbacks of students
Trainer Feedback	Odalis LMS internal feedbacks of trainers

Tab.: Standard reports in Odalis LMS

12.2 Where to Find Reports

12.2.1 Quick Access to Predifined Reports on User Panel

In the upper area the *users*-panel in the *LPM* contains a selector for quick access to predefined reports. The data source basis is the current node level (e. g. a course room or a category).

Fig.: Report Selector

12.2.2 MyOdalis LMS Reporting Interface

MyReporting (area: *myOdalis LMS*) shows a selection avialable of reports created for a specific role.

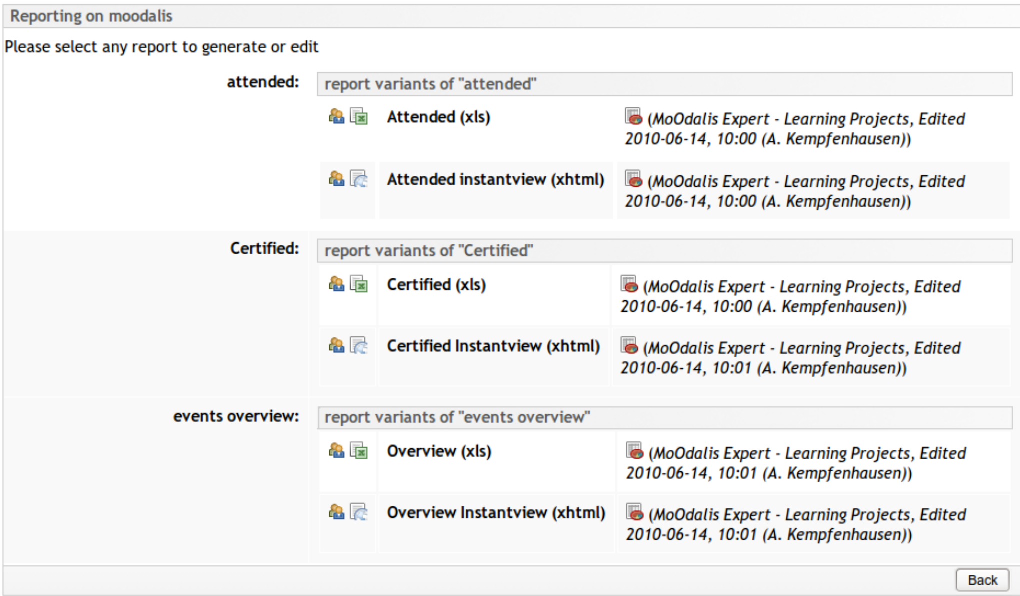


Fig.: Overview of reports for a supervisor role.

12.3 Creating Custom Report Variants

The preconfigured reports provide a basis to create a customized variants. Thereby the following parameters can be adjusted to your needs:

- filter events according to certain criteria
- filter users according to certain criteria
- filter according to time periods
- order and type of fields
- column labels
- user and group access

As local admin you will find an edit icon for every preconfigured report. Once you click you will see an interface to configure a new report on the basis of the chosen template.

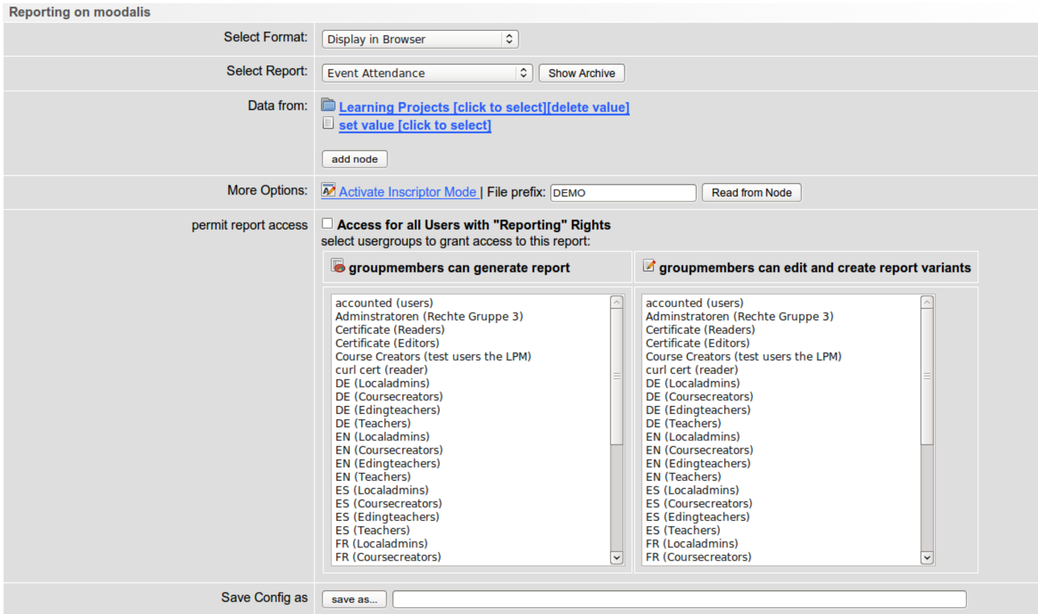
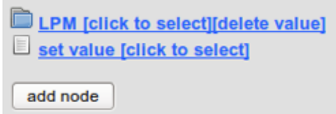
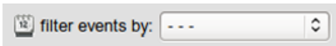
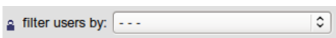


Fig.: Editor to create custom reports on the basis of preconfigured templates.

The following options are available:

Label	Interface	Description
Select format		Select or check the format. You can choose between browser display and a file format (e. g. MS Excel).
Data from		Select one or more nodes (e. g. categories, coures etc.), which should be included within the report; on click the *node selector ?*
Filter Events by		Select a field type according to which the data should be filtered. After having chosen a field type you will get a selectbox or text-field where you can choose or enter a field value, which will be used to filter the data.
Filter Users by		Select a field type according to which the data should be filtered. After having chosen a field type you will get a selectbox or text-field where you can choose or enter a field value, which will be used to filter the data.
Show Fields		Leave the checkbox checked to keep the field or uncheck the box to remove the field from the customized report variant. Use the blue arrows to change the column order.

Activate Inscription Mode	Activate Inscriptor Mode	Activate the *inscription mode ?* to adjust the column titles and other within the report if you do not want to use the internal names
File Prefix	File prefix: DEMO Read from Node	Provide a file prefix which will be used as first part of the file name in case you chose some filter type as report format or click *Read from Node* to automatically generate a prefix derived from the first node you chose in the *Data from* configuration option
Save Config as	save as...	Give a telling name for this configuration and save the report variant for future use by clicking the *Save Config As* button

Furthermore access right can be set to grand reading and/or writing access for specific user groups:

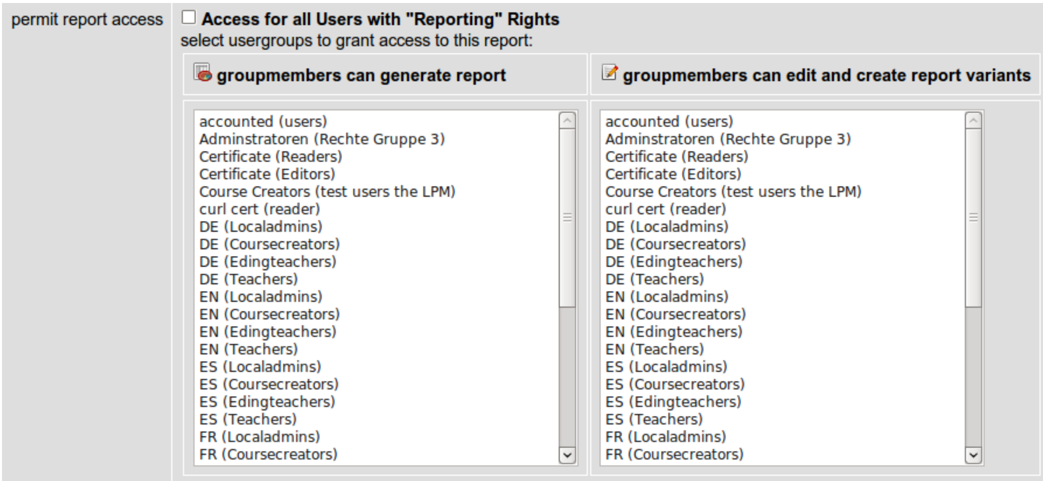


Fig.: Granting reading and writing access to reports.

To grant access to a specific user group (e. g. local admin from the english server)

1. Click on Access for all Users with „Reporting“ Rights to make the report generally available to user roles with specified access to reports
2. Choose then a user group from the lists below to grant the right to generate and/or to create variants of reports (select more than one group by pressing the shift key when selecting)

13 Managing Users and Roles

This chapter explains, how you add new users to Odalis LMS. These users will automatically be available in the *integrated OS-LMS*. The data set belonging to one user is called a *user profile*. The user profile contains e. g. the name, email adress and login information but can also contain further information like accounting data, acquired certificates and language skills of the user.

Also it will be shown, how you assign roles to uses. A role is a set of grouped permissions to perfom certain tasks e. g. „teacher with editing permission“ or „administrator“.

13.1 Creating new user profile

The user management usually is located in the *AdminCenter*. Depending on your configuration you might find it as well located in the *My Odalis* area.

To create a new user account perform the following steps:

Go to the user profiles, usually located in the *AdminCenter* (or *My Odalis* area).

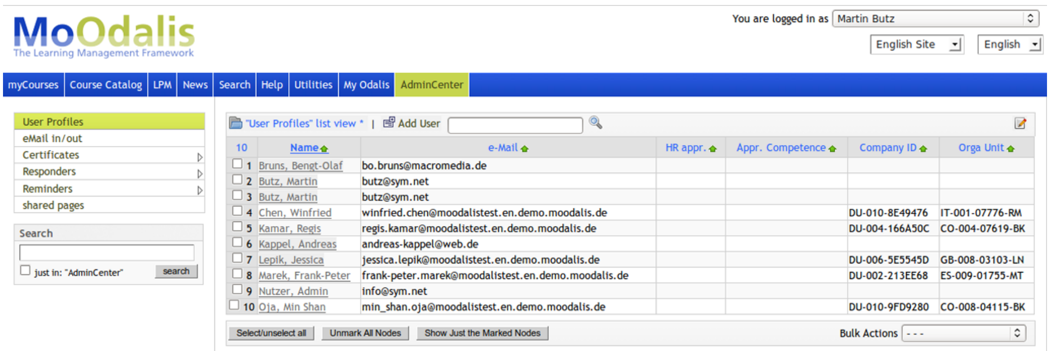


Fig.: User profiles

Click the *Add User Link* ...

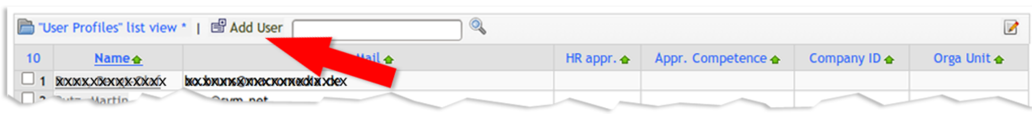


Fig.: *Add User* link on top of the user table

... and fill in the upcomming form with some basic data such as *name*, *prename*, *gender*, *Login name* and *email* address.

After having saved the form you will be guided to a set of panels, containing forms to complete the user profile.

NOTE: The available panels, forms and fields may differ according to your system configuration. You do not have to fill in any of this additional information to create a new user.

Nevertheless it might be necessary to provide data for approval purposes located on the panel *Miscellaneous* (*HR Approver*, *Approval Competence*, *Company ID*, *Cost Centre* and/or *Organisation Unit*).

The standard setup will comprise the following panels:

Main Data

- Image (profile image may be uploaded)
- Institution/Company
- Departement
- Position
- Phone
- Mobile
- Email
- Building
- Room
- Statement

Business Data

- Accounting
- Address for Account

Skills

- Skills
- Language and Level of Expertise
- Current Tasks
- Completed Projects
- Education

Certificates

- Certificate Name
- acquired (date of Akquisition)
- Drawer
- valid until

Enrolements

- List of courses the user is attending

Miscellaneous

- Gender
- HR Approver

- Approval Competence
- Company ID
- Cost Centre
- Organisation Unit
- Preferred Language
- Country
- City

Repository

- personal repository, see chapter *8 Repositories*

Administration

- User Domain
- Latest Login
- Service Client ID
- Username
- Password
- Login as (function to login as user with the currently chosen user profile)
- Group membership
- Open Core User Managment (in case of an attached *integrated OS-LMS* the function will open the *integrated OS-LMS* user management)

13.2 Assigning roles to users

To assign an user to any roles you simply visit the node (page or area), where you can grant access according to the defined role (e. g. server, category or course)

> **NOTE**: All rights comprised by the role will be inherited to the nodes below the node, where you have assigned the role. E. g.: If you have administrator access to the category „Introductiory Courses“ *you will have also administration access to all courses within this category*.

To asign e. g. the role facilitator with editing access:

- Go to the *LPM* and choose the node (e. g. category or course) where you want to add a user with the respective role and
- change to the *users*-panel.

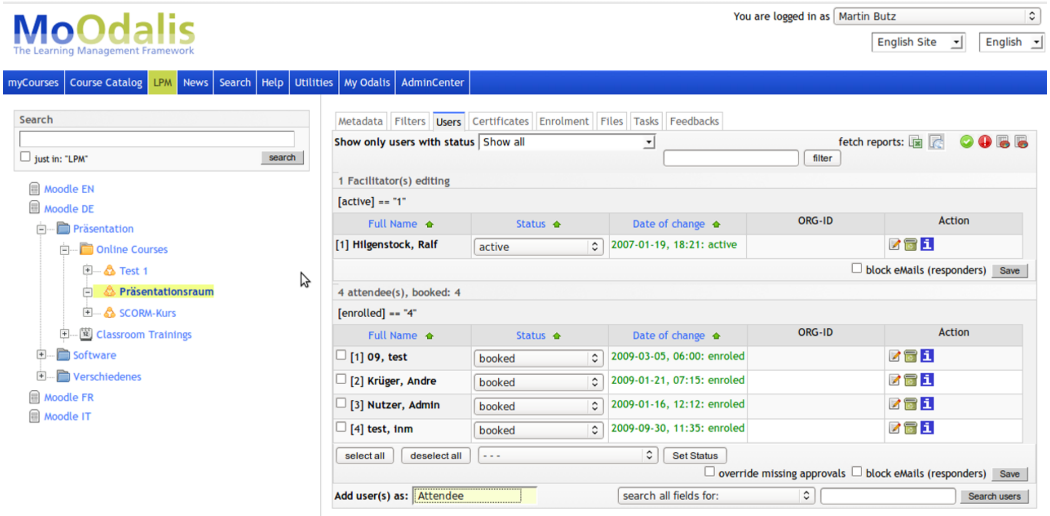


Fig.: *Users*-panel of the node, where a user with a specific role should be added.

At the bottom of the *users*-panel

- choose the desired role and
- enter a token of the user's name or email adress and click *Search Users,*

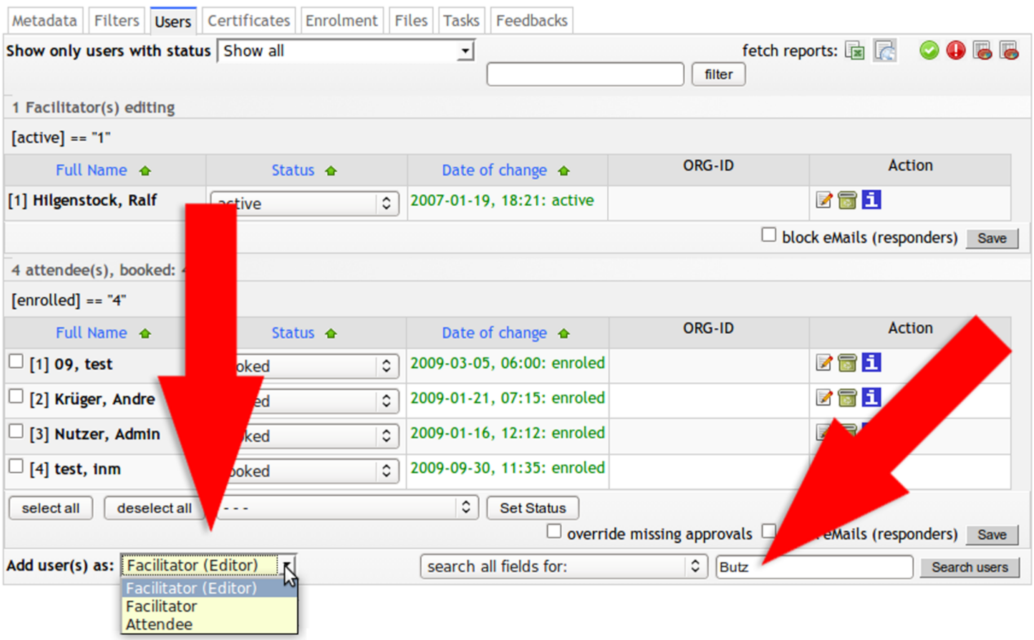


Fig.: Choose role (left arrow) and add search for user by name or email (right arrow).

- select the desired user from the result list and
- set appropriate status e. g. active or inactive,
- click *Add Selected Users* to add the selected users and asign the selected role.

- You can surpress any configured email responders by checking *block emails (responders)*.

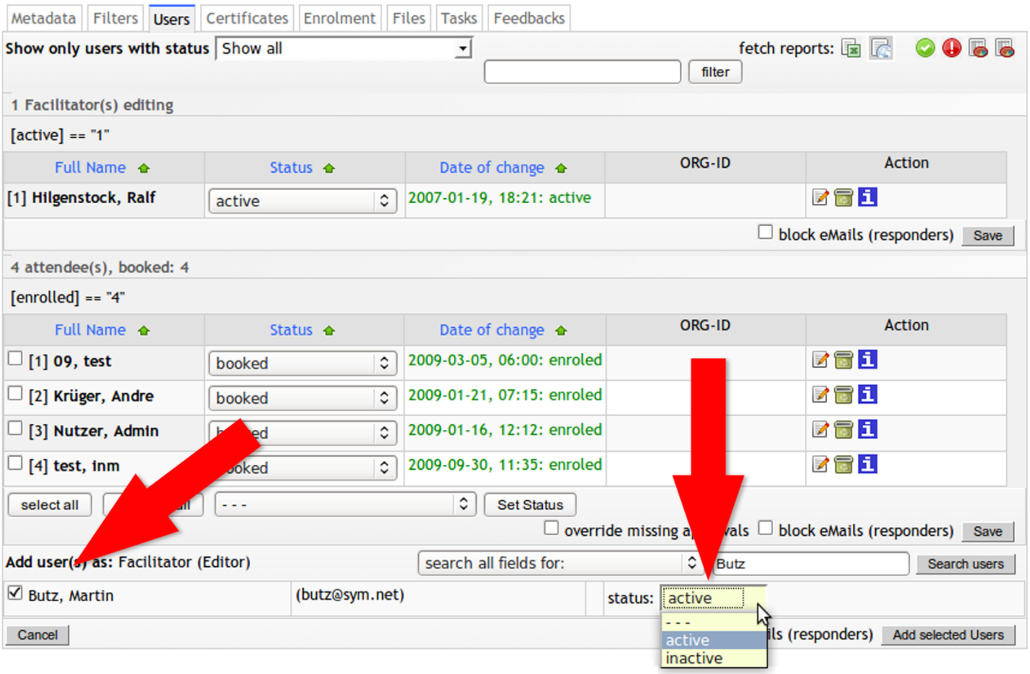


Fig.: Check user you would like to add (left arrow) and set status to desired value, e. g. „active“ (right arrow).

NOTE: The available state (see: *status*) change according to the type of role. You can e. g. set an *administrator* to the state *active* or *inactive* and an *attendee* to *approval asked* or *booked*.

After having completed the action the user will show up on the *users*-panel within the appropriate column (here: user *Martin Butz* below the heading *Facilitator(s) editing*)

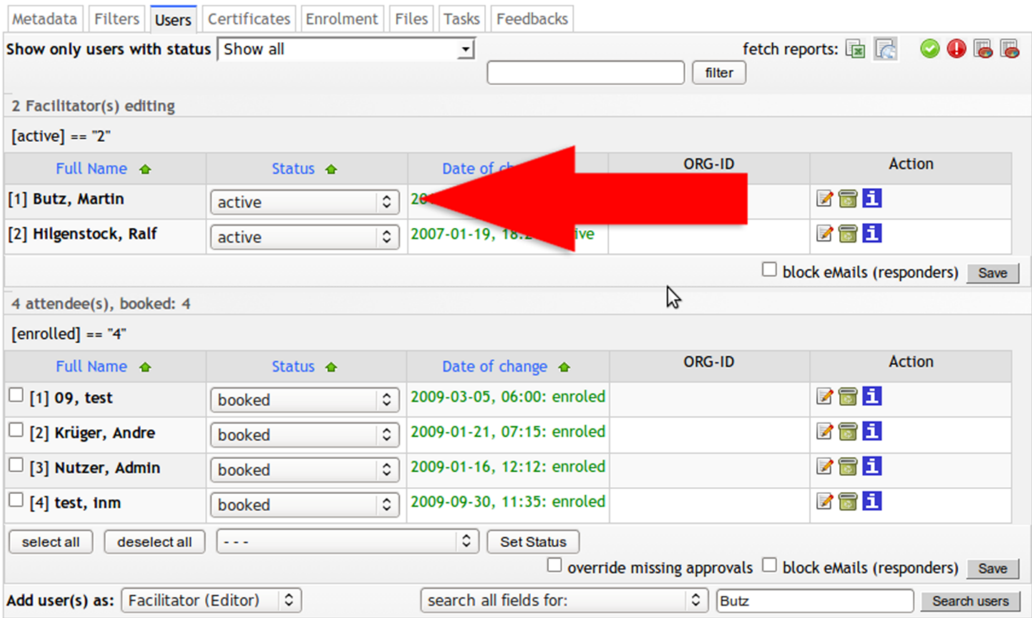


Fig.: User is now listed within the selected role and status.

13.3 Bulk Import of Users

Users can be imported into Odalis LMS using the bulk import function. This involves a data source and a import configuration.

The following description assumes that the import will be done on the base of an Excel file and that your administrator has already prepared an appropriate import configuration.

To import users from a file go to the user management and choose *import nodes* from the select box *Bulk Actions* at the bottom right corner of the user list:

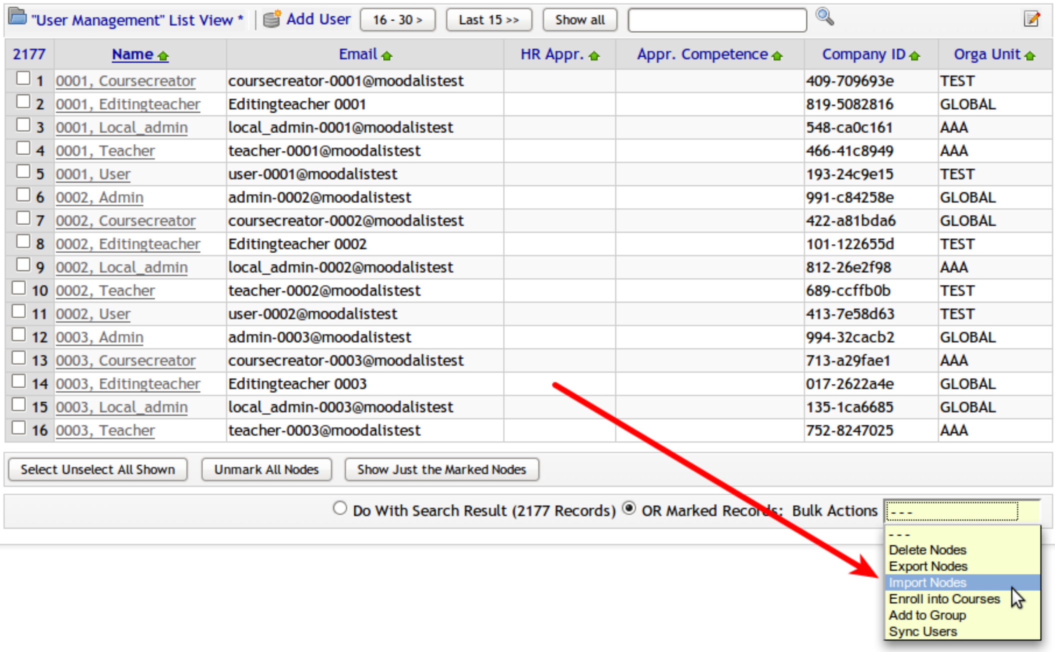


Fig.: The *bulk actions* drop down offers the option to import users

In the following form you have to (1) select an import file and (2) the appropriate configuration for the import. This configuration usually has been prepared and tested by your administrator.

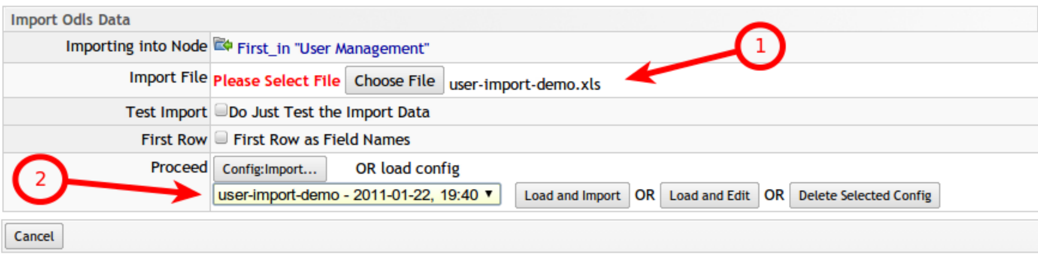


Fig.: (1) Choose a file (Excel) and (2) the appropriate configuration

There are some additional options available:

Label	**Description**
Importing into Node	The import function is a generic one; you can import data at an place into Odalis LMS; for user data import you should leave the node *First in „User Management“*
Test import	a dry run function, the import will only be tested but not written to the user database
First Row as Field Names	The first row in the import file will be interpreted as field names. Check this field only if 1. you want to setup a new configuration and 2. you now that the first row of your Excel file contains the column names (see *Fehler: Referenz nicht gefunden Fehler: Referenz nicht gefunden*)
Config: Import... (Button)	Advanced configuration option (see *Fehler: Referenz nicht gefunden Fehler: Referenz nicht*

	gefunden)
Load and Edit (Button)	Edit the current import configuration (see *Fehler: Referenz nicht gefunden Fehler: Referenz nicht gefunden*)
Delete Selected Config (Button)	Delete the current import configuration

Click the *Load and Import*-button to perfom the import with the selected configuration. The following screen presents log messages from the import process:

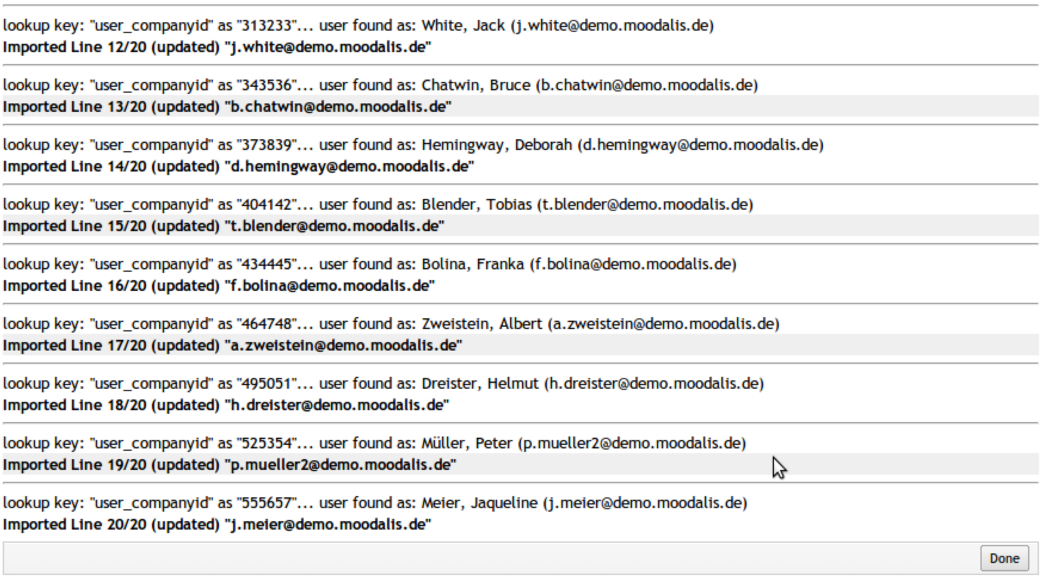


Fig.: Log messages from an import process; click *Done* if you want to finish the import without enrolling the imported users into an event.

The import function checks preconfigured fields (by default e. g. email and name) to determine, if a user is already in the user management or if it is a fresh import. Thus the log messages will either tell, that the user has been found or has been created.

Click the Done-button to finish the import without any further action. Frequently users should become enrolled into one or more events immediately after the import. This is the reason, why import and enrollment of new users are linked together. Please go on to the next chapter for the bulk enrollment of users.

13.4 Bulk Enrollment of Users

13.4.1 Mark Users For Bulk Enrollment

There are 3 ways to select users from the user database in order to enroll these (or to set another available status such as e. g. *waitisted*):

1. Import users from a file as described in chapter *13.3 Bulk Import of Users*)
2. Use the quick search in the user management and mark users

manually (see 13.4.2 Quick Search For Users)

3. Search for users using the exteded filter search (see 13.4.3 Filtered Search For Users)

13.4.2 Quick Search For Users

To perfom a quick search use the search field on top of the user list in the user management:

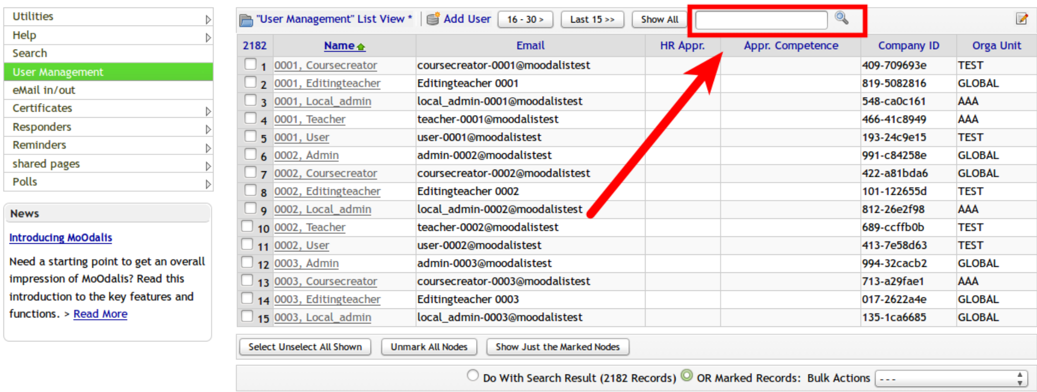


Fig.: To find a user or a group of users you can use the quick search on top of the user list

The search will be a fulltext search covering a selection of the relevant fields of the user database. Use this search facility e. g. to search for the users name or email adress. Once you have clicked the magnifier-icon the selection will show all users matching the search term:

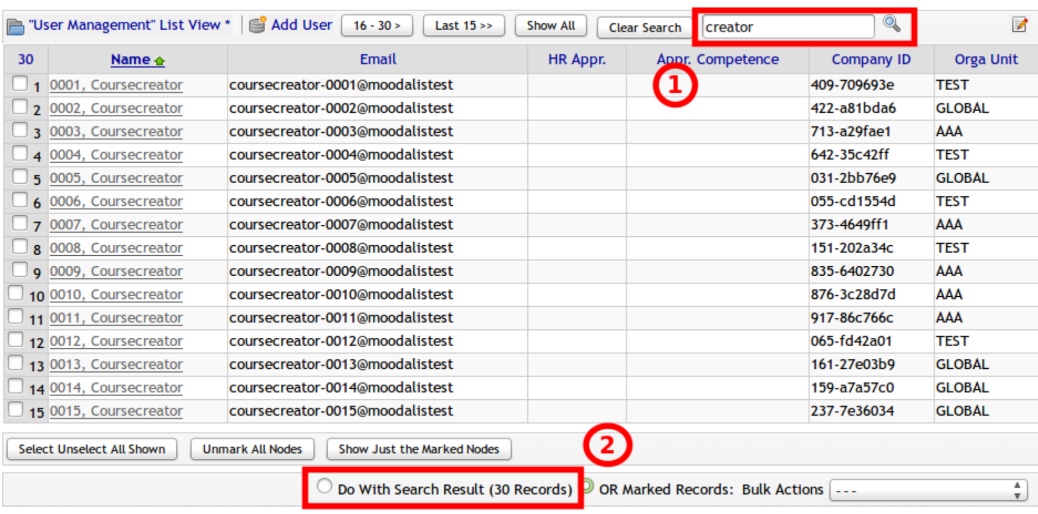


Fig.: (1) Perfoming a search for the term „creator“ found (2) 30 matching records.

Bear in mind that dependant on the search term the list of found records might be quite long. By default the list only displays 15 records. You can either flip through the list by using the buttons at top of the list or show the complete list:

Button	Function

16 - 30 >	Show the next 15 records
Last 15 >>	show the last 15 records = jump to the end of the found users
Show All	Show the complete list; be careful: if you have found a large amount of users matching you search term (e. g. a few hundred of thousand) displayingf the complete list may take some time.

Click the *Clear Search*-button to suspend any previous selection and start a new search.

To select for enrollment (see the following numbered screenshot):

1. Mark one or more users,
2. make sure the option *Marked Records* is checked and
3. choose *Enroll to Events* from the *Bulk Action*-menu to call the enrollment dialog.

If you want to manipulate all users found by your search use the option *Do With Search Result* (compare screenshot following at number 2)

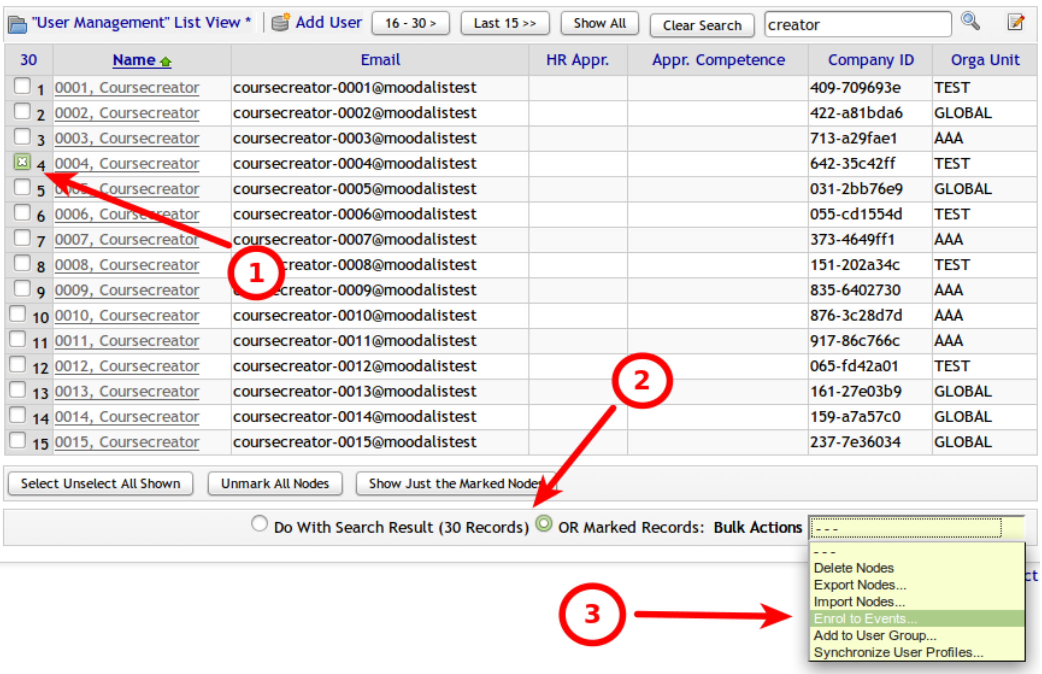


Fig.: (1) Mark one or more users from the list, (2) check *OR Marked Records* if you only want to manipulate the marked users and (3) choose *Enroll to Events* to call the enrollment dialog.

Continue with chapter *13.4.4 Enroll Users*.

13.4.3 Filtered Search For Users

You can also use the advanced filter functionality to identify a specific group of users. Choose the *Enroll to Events*-option from the *Bulk Actions*-menu without preselecting any users as described in chapter *13.3 Bulk Import of Users* and *13.4.2 Quick Search For Users*:

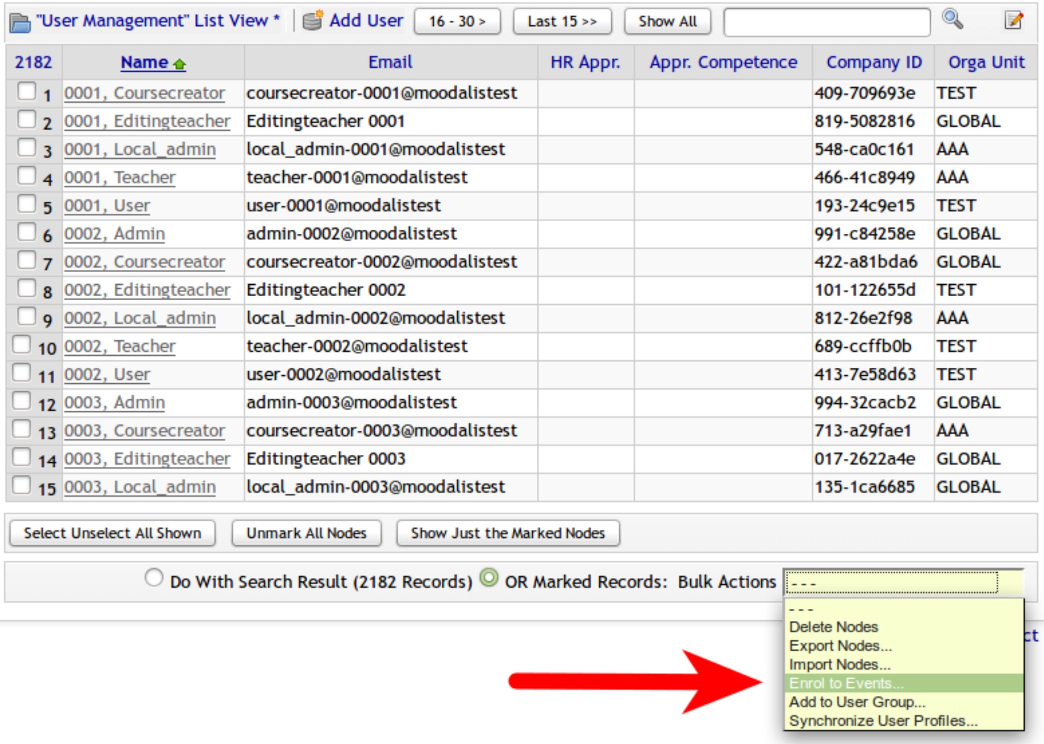


Fig.: Choose the *Enroll to Events*-option from the *Bulk Actions*-menu with preselecting any users to start with a selection based on filters.

You will get a filter interface to select users based on certain *expressions*; the *Eroll Marked Users* note will show *0* users selected:

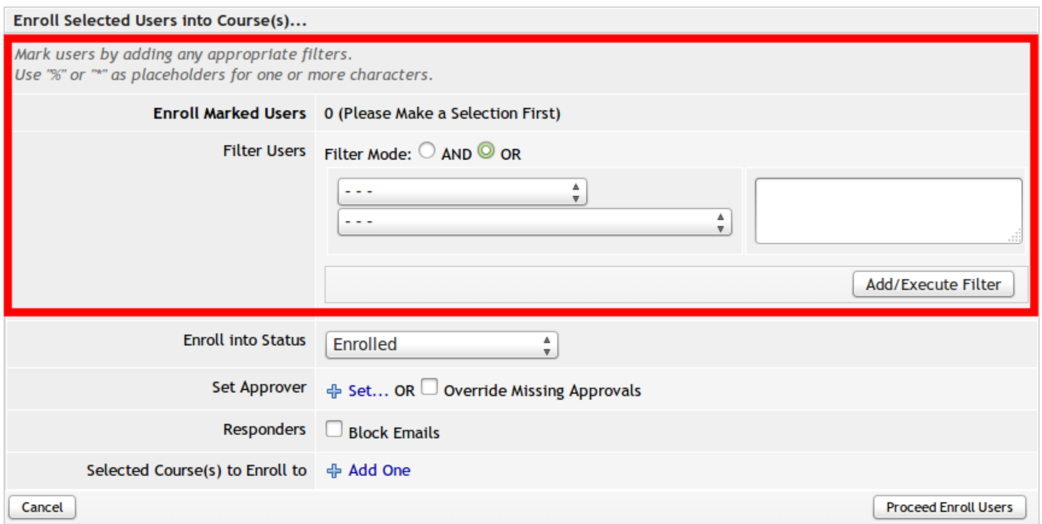
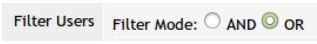
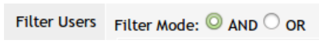


Fig.: The Enroll Selected Users to Course(s) provides an advanced filter functionality

Proceed with the following steps:

1. If needed you can combine two or more filters. If yes, be careful to choose whether these filter should work in the *And*- or the *Or*-mode:

Widget	Mode	Effect
	OR (default)	Selection of users will be done on first matching filter (Example: *email* or *last name* must match)
	AND	Selection of users will be done only if all defined filters match (Example: *country* and *last name* must match)

2. Set the filter expression for the filter(s). The follwing example screens assume, that you are looking for users with a specific *email*-address.

NOTE: The available filter expressions depend on your requirements and the level of customization. Basically all structured information about the users (e. g. name, gender, position) can be set as part of the filter functionality.

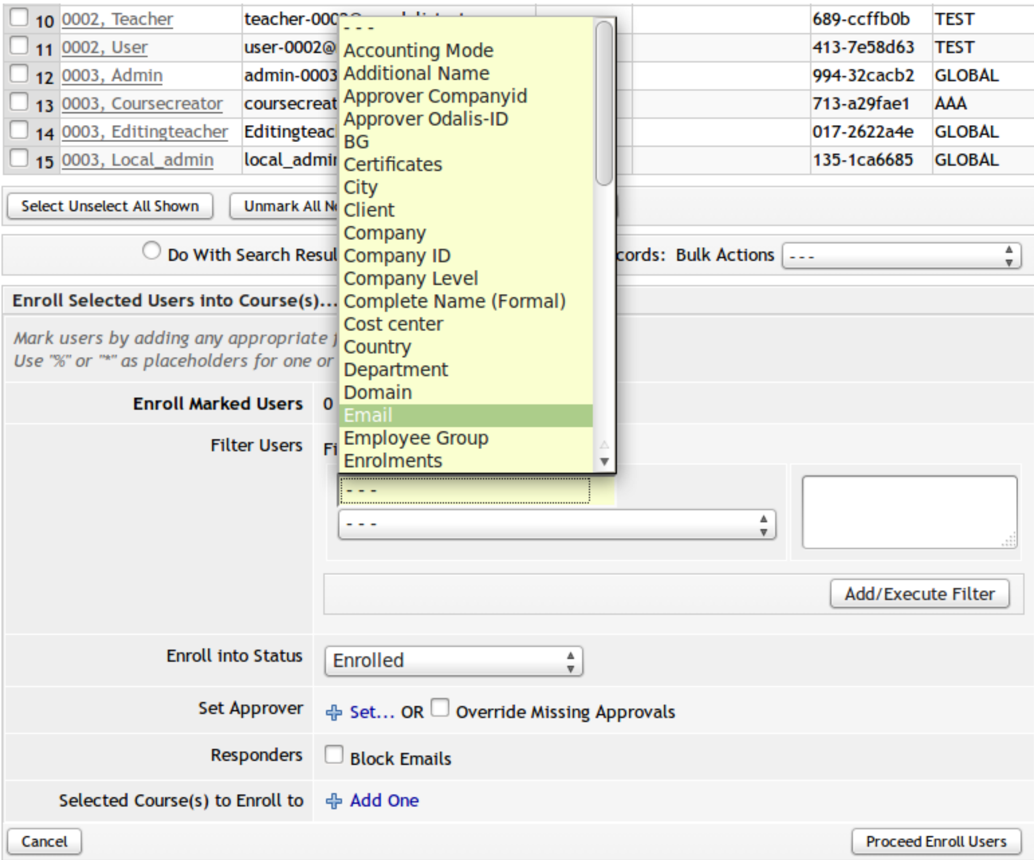


Fig.: Choose a filter exppression e. g. email

3. Choose the *operator* to compare the email (or other expression) with the value you will provide.

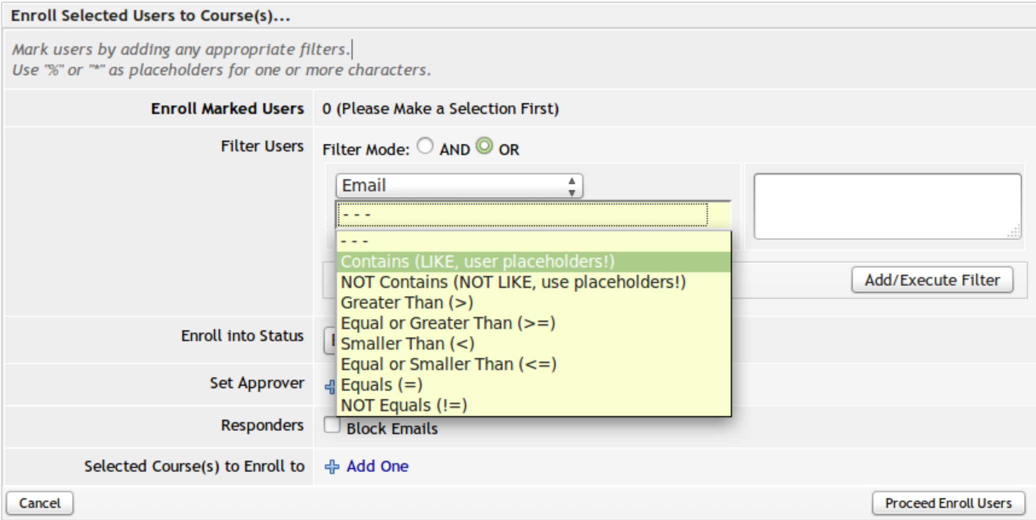


Fig.: Choose an operator e. g. *like*

Use „%“ or „*“ as placeholder for one or more characters (e. g. „wil*“ will find *will*, *wild* and *wilderness*).

The following operators are available bei default:

Operator	**Details**	**Example**
Contains	checks whether given string is contained in the expression	„*@company.com“ will find all email addresses containing „@company.com“
NOT Contains	checks whether given string is *not* contained in the expression	„*@company.com“ will find all email addresses that do not contain „@company.com“
Greater Than	checks whether given number value is greater than expression	„5000“ (company id) will find all company ids from 5001 upwards
Equal or Greater Than	checks whether given number value is equal or greater than expression	„5000“ (company id) will find all company ids from 5000 upwards
Smaller Than	checks whether given number value is smaller than expression	„1968“ (year of birth) will find all users born before 1968
Equal or Smaller Than	checks whether given number value is smaller or equal than expression	„1968“ (year of birth) will find all users born before 1969
Equals	checks whether given string exactly matches the expression	„Germany“ (country) will fild all users from Germany
NOT Equals	checks whether given string does not match the expression	„Germany“ (country) will find all users who do not come from Germany

4. Click the *Add/Execute Filter*-button to either add another filter set or to perform the search.
   If the search was successful you will see the number of found records next to the *Enroll Marked Users*-label.

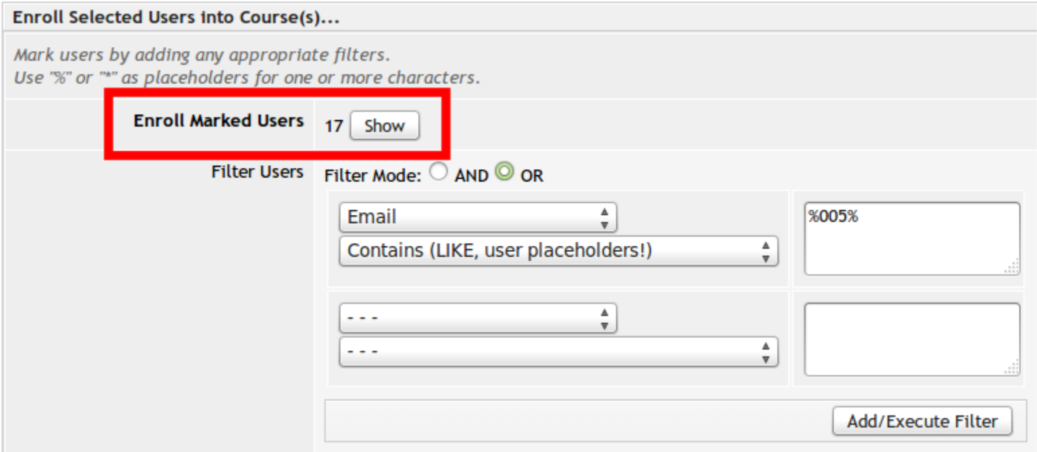


Fig.: A search for the filter expression email containing the string „005“ shows 17 results. To display a list of the search result click the *Show*-button

5. To see a list of all found users click the *Show*-button:

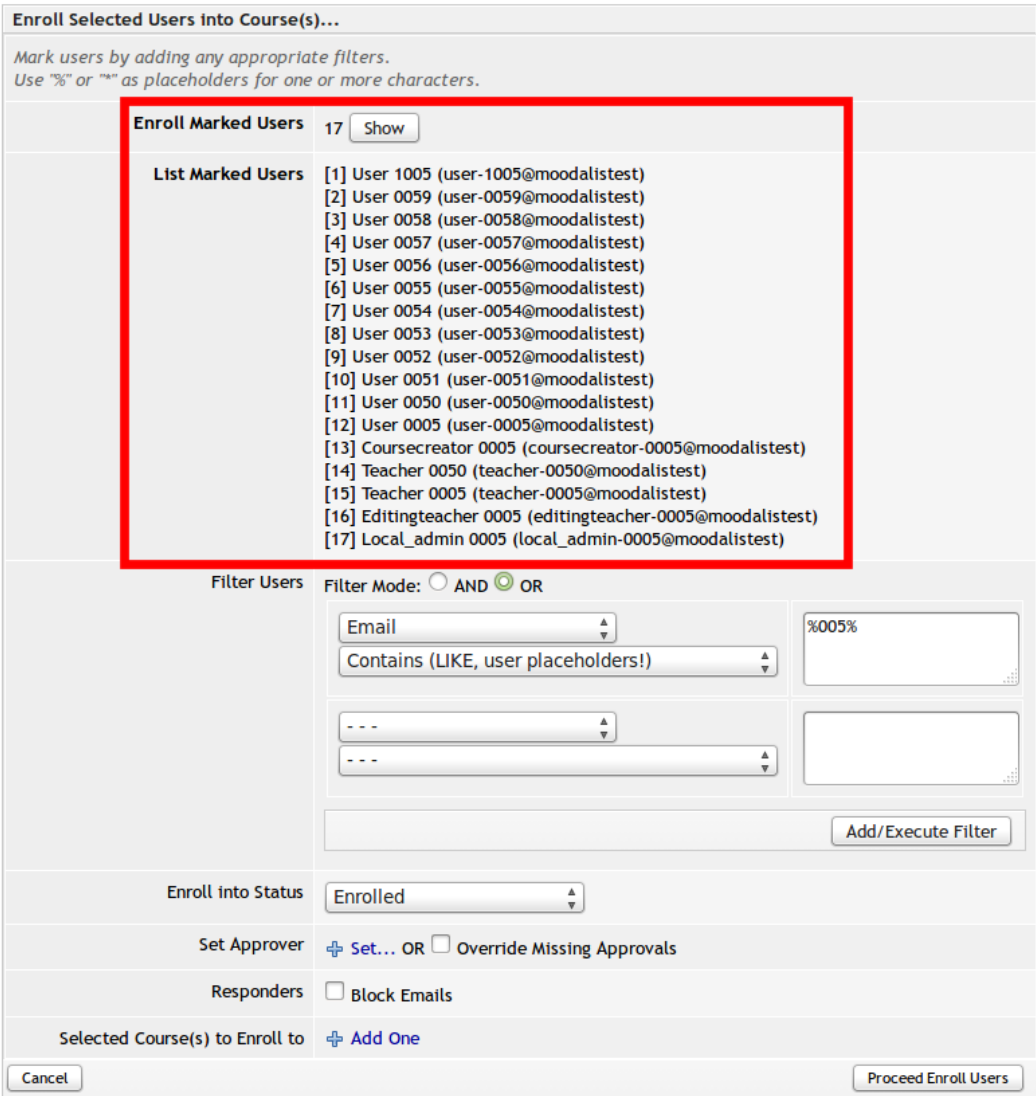


Fig.: A list of all users identified by the filtered search.

You can now proceed to enroll the marked users. See the following chapter *13.4.4 Enroll Users* for details.

13.4.4 Enroll Users

If you have marked users for enrollment as described in *13.4.1 Mark Users For Bulk Enrollment* and the following chapters, you can proceed to enroll these users.

The bulk enrollment-panel shows the following view:

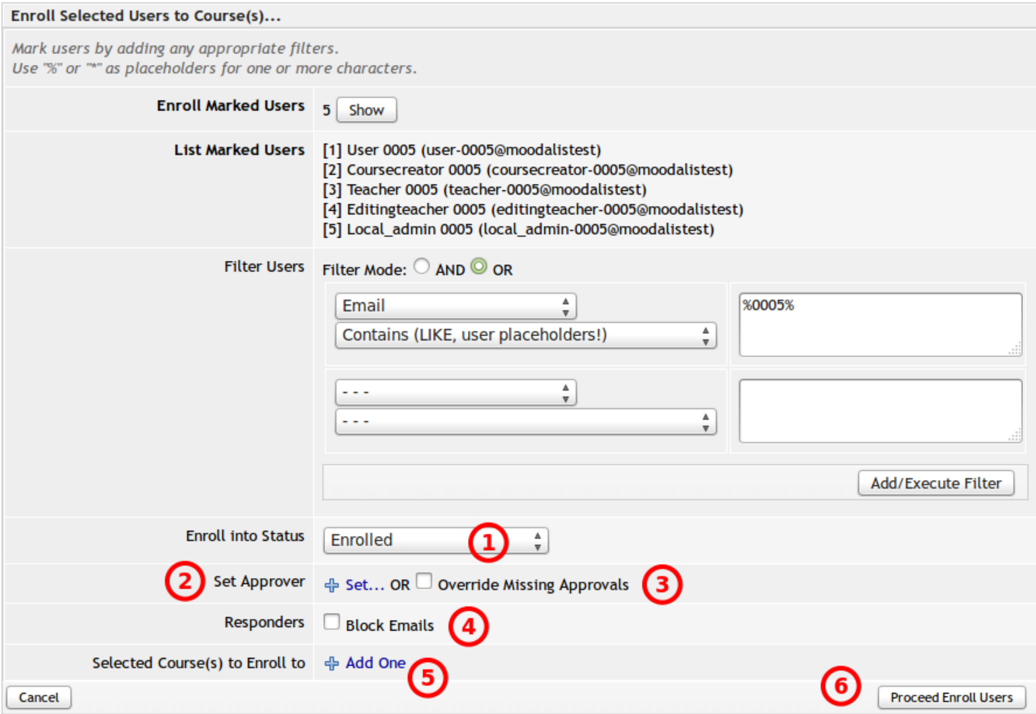


Fig.: The bulk enrollment-panel

Complete the following steps to enroll the marked users (see preceeding screenshot):

1. Select the status for the enrollment; the default value is *enrolled*.
2. Set an approver (for all enrollments) or check the box *Override Missing Approvals* to make sure that the users will be enrolled to trainings subject to approval without any delay due to a missing approval.
3. Check the box *Responders* if you do not want to send out the configurated responders.
4. Click *Add One* to get the *node selector* and choose from the *LPM* the course, you want the marked users to enroll to; repeat these steps to enroll into more than one course.
5. Proceed and finish the enrollments.

You will then get a message showing the course(s) and a numbered list of the enrolled users; a note behind the user name tells, if the user was found in the attached *integrated OS-LMS* (e. g. „2026 found“ = user with ID 2026 was found in the integrated OS-LMS) or if she was created to synchronize the Odalis LMS user database with the integrated OS-LMS.

Fig.: Message showing the course(s) and a numbered list of the enrolled users; the code behind the user name tells, if the user was successfully identified.

14 Notification emails (responder/reminder)

Odalis LMS is able to send emails triggered by certain events or on a temporal basis. An event can be a change in a user's state (e. g. *graduated* versus *enroled*) or a change of a document within the repository. On one side Odalis LMS can check a time frame, e. g. send reminder emails to users or send reports after a certain period of time emails that have been triggered by certain events and/or on a temporal basis. An event will usually be a change in a user's state (e. g. *graduated* versus *enroled*). On the other side Odalis LMS can check a time frame, e. g. send reminder emails to users. The former are called *responders*, the later *reminders*.

Reminders and responders are set up system-wide with the following specifications:

- Each system-wide reminder and responder can be set up in multiple languages. Usually the *course's language setting* (see *7.9.4.1 Metadata*) decides, which language version will be received; this setting is configurable and could e. g. also be the *user's* language setting.
- Each status is linked to a responder. These are called *cases*. For every case a set of recipients and appropriate messages can be set up (e. g. in case of the status *approval asked* the future participant will get message A, the approver will get message B and the HR devision will get message C)
- A basic distinction has been implemented between online and classroom courses training related messages meaning that the case *enrolled* will trigger different responders; usually the later contains other/additional placeholders such as *venue* and *date*.

14.1.1 Responders

In the Odalis LMS standard version all statuses (see *7.10.1 User Statuses*) are linked to standard email templates, informing the relevant individual about the ongoing processes.

An email template consists of *a text including placeholders* to indivudialize the message by inserting participant and course information i. e. dynamic data.

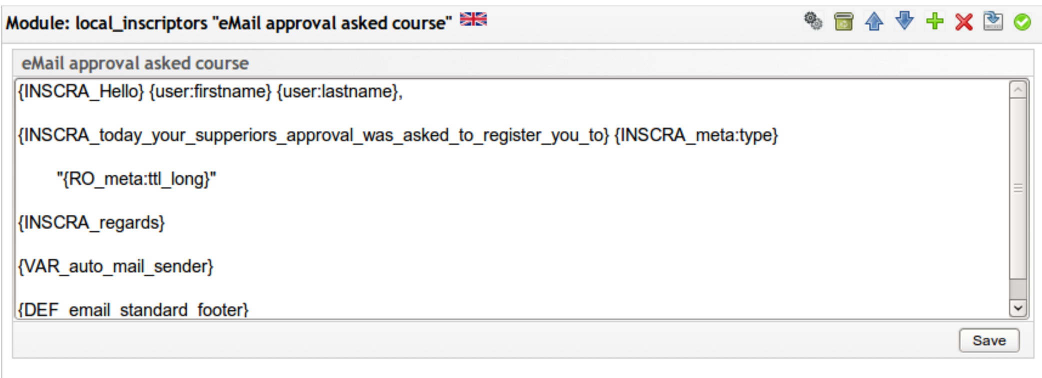


Fig.: A setup field for a message sent in case of a request for approval for an online course room.

In most cases the process of customization runs as following:

- Client get a prepared Excel-Sheet containing all relevant statuses, email subjects and email body texts contained in the Odalis LMS standard system, including placeholders,
- client additionally gets a full list of possible placeholders to determine, which are replaced by individual informations (such as user and course name etc.),
- client modifies Excel-Sheet according to his requirements inserting customized email subjects and email body texts including placeholders for dynamic data insertion in all languages, that will be needed.
- Odalis LMS implementation partner configures the system on the basis of delivered Excel-Sheet.

14.1.2 Reminders

For reminders applies broadly speaking the same information as for responders. Additionally for each reminder a periode has to be determined and set up (e. g. *course participation reminder* is sent 3 days in advance regarding the course starting time).

14.2 Individual notification emails for the LPM

NOTE: This chapter describes how you can set up Email templates for indiviual online trainings. *Make sure that the Administrator has set up and tested the basic functionally for notification emails.*

To setup email templates for individual online trainings go to the training in question in the *LPM* and choose the r*esponders*-panel:

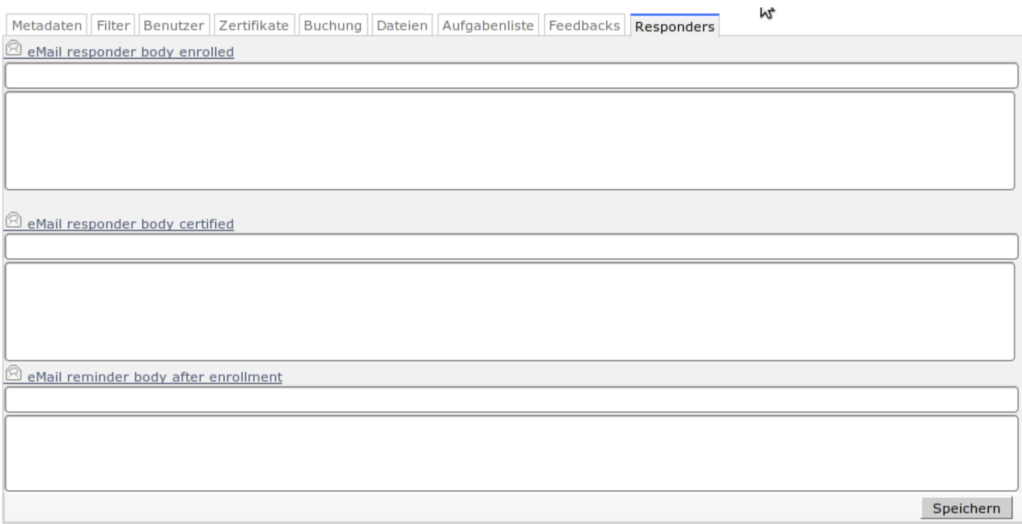


Fig.: Form to setup individual responders and reminders for an online training (e. g. WBT)

Users find a set of form fields for diffenent responders and/or reminders e. g.:

Fieldset	**Description**
email responder body enrolled	subject and body for email, which will be sent in case a user has been enrolled into the training
email responder body certified	subject and body for email, which will be sent in case a user has been graduated an will receive a certificate
email reminder body after enrollment	subject and body for email, which will be sent in case a user has to be reminded to attend the training; you will find the corresponding deatlines on the *enrollments*-panel (fieldname: *remind after enrollment*)

You can paste any desired text into the form fields. As the content is sent as a simple email there are only line breaks and spaces available to formate the text.

You can use *placeholders* to insert dynamic text components like the URL to the course room, saluation and user name. Please refer to the pages for a complete list of placeholders.

14.3 Explanation of placeholder naming

Placeholder Prefix	Description	Example
VAR_	Value lists or expressions combining different field values to a coherent message	{VAR_event_fee} e. g. „120 € including tax“ (= value + currency + remark)
user:	Data from user-enrollment record	{user:lastname} e. g. „Meier“
meta:	Meta data from course database	{meta:title} e. g. „Introduction to Moderation“
data:	Other data from course database	{data:event_locaton} e. g. „Munich“
INSCRA_	Expressions from the inscriptor database, which contains interface labels and other language specific expressions used in serveral places of the system	{INSCRA_Org_ID} e. g. „Organisational ID“
CONF_	Chunks of text usually in the form of a template file	{CONF_email_standard_footer_responder_en} e. g. the standard system email footer in English

Additionally there is a script construct, which allows to insert data conditionally.

In case you would like to offer files to download after the enrollement if the course creator has provided any, you can use the following construct:

```
Some text goes here.
{IF_VAR_filelist}
  {data:related_files_comments}
  {VAR_filelist}
{END_IF}
```

If files have been provided in the course managment (LPM) the output within the email could look as follows:

```
Some text goes here.
Please download and read this material to prepare for the first training session:
Manual-to-read.pdf
Presentation-to-read.pdf
```

If no files have been provided, no text from inbetween the conditional statement will be printed at all. The result of the uper example would be:

```
Some text goes here.
```

14.4 List of Placeholders

15 News editor

15.1 Introduction

The news area provides a way to create and distribute course room independent news articles, e.g. to advertise learning offers or to inform about system changes or extensions.

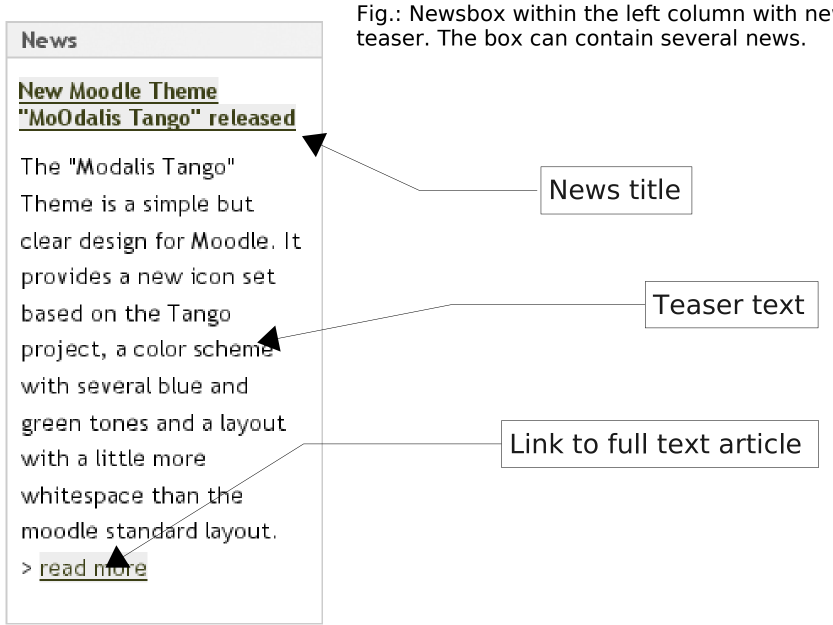
15.2 The „News“ area

The news area can be reached by clicking the news label within the *global navigation*. Here you can create and edit news as well as store them in an archive. Once published the news will be displayed as a box within a sidebar (newsbox). News consist of

- a title
- a short text (teaser)
- and a reference linked to the full-text article

The news box can be included anywhere on the site by the administrator.

Fig.: Newsbox within the left column with news title and teaser. The box can contain several news.



The news area shows an overview of all articles (headline, teaser, link to complete article) currently available to be displayed in the newsbox.

Fig.: News area with overview of all news.

The toolbar on top of every news entry provides several functions:

- Create new articles
- Edit, move, archive and delete news articles

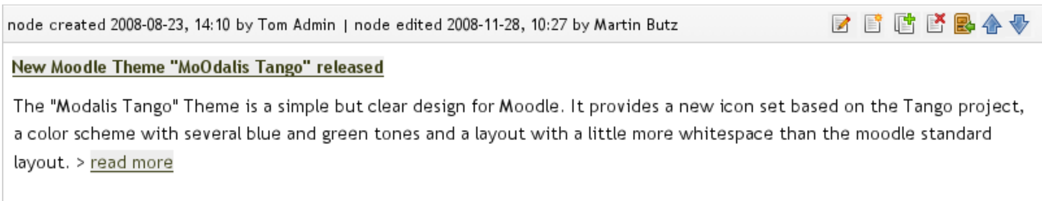


Fig.: Single news article with title, teaser and edit toolbar at the top right side.

NOTE: Some of the icons might lack, because the corresponding function is not needed (f. e. the first news box does not have the arrow icon to *move up*). Icons are provided (or removed) in specific contexts.

Fig.: Toolbar. Available functions from left to right: edit, create, copy, delete, archive, move up and/or move down (in case there is more than one news article).

15.3 Create a new article

To create a news article click *create article*:

Fig.: To create a new article klick „Create Article“ on top of content area or at toolbar on top of news listed on the page.

You can now fill in a title for the news article. This title should be rather short, as it will be displayed whithin the navigation and as headline of the article teaser within the news box.

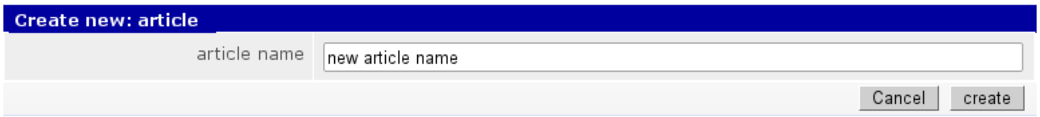


Fig.: Insert title to create new article

After clicking *create* you will get a form providing fields for a long title, a teaser or an article summary and an article text itself (wysiwyg editor):

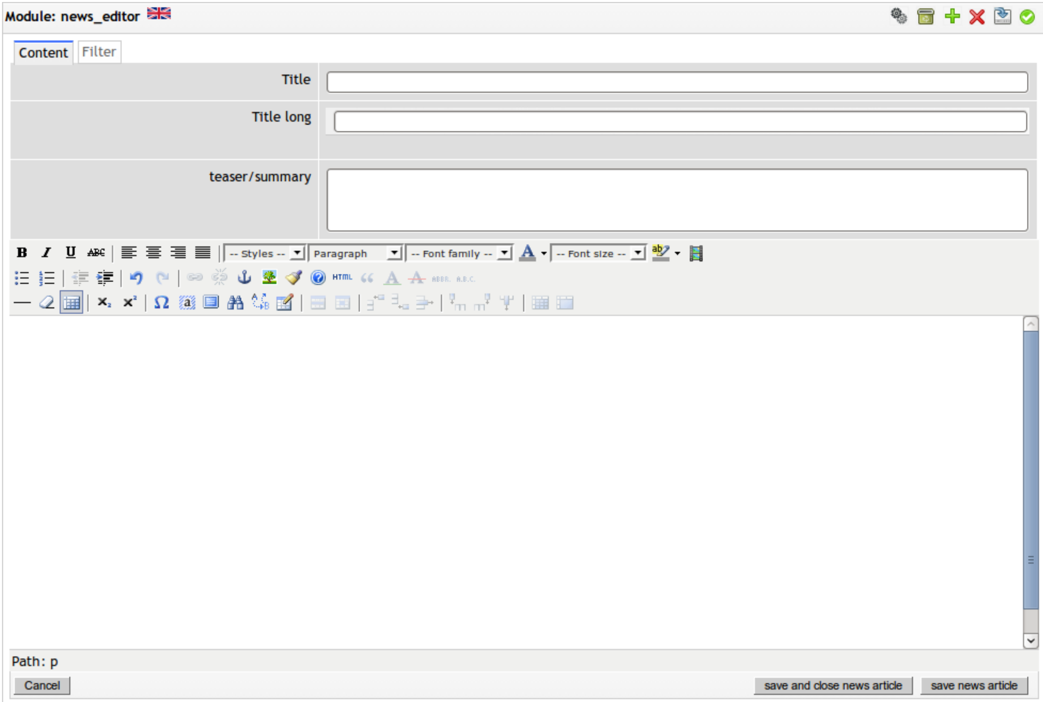


Fig.: Empty form of news editor to create a new article

Description of the fields provided within the news editor:

Field Name	**Description**	**Recommendation**
title	Short title; will be desplayed as headline within the news box and as link within the local navigation (ususally in the left column)	should be short
long title	will be displayed as title of the browser window and as mouse over tooltip while hovering the navigation entries (usually in the left column)	up to 256 characters
teaser/summary	summary of the news article **Important:** If you do not provide a teaser text the news will not be announced within the newsbox	should be short, depending on the layout and the widh of the newsbox
content	text and/or images or meda	-

After having created a new article you should click *Save new article*; you can save and leave the editor by clicking the green dot at the top left corner of the module. Clicking on the hard disk icon will just save the module without closing it.

Every layout module (including the news editor) contains a toolbar at the top left corner:

Fig.: Default toolbar of layout modul with wysiwyg editor

Explanations of icons and functions from left to right:

Icon	Motif	Description
	Gears	Module configuration (usually done by the administrator)
	Garbage Can	Delete module
	Green Plus Sigen	Insert a new module
	Red Cross	Close module without saving = cancel: no changes of content will be saved
	Hard Disk with Arrow	Save module content; leave module opened for further editing content
	Green Badge with Hook	Close module and save content

After closing the module you can see a preview of the article (as any user with read access right would do).

15.4 Edit an article

To edit a news article click the *edit article* icon:

Fig.: To edit a new article click „edit article icon in the toolbar of the news article you want to change.

You will then get a view where you can edit the title, long title, the teaser/summary and the news text:

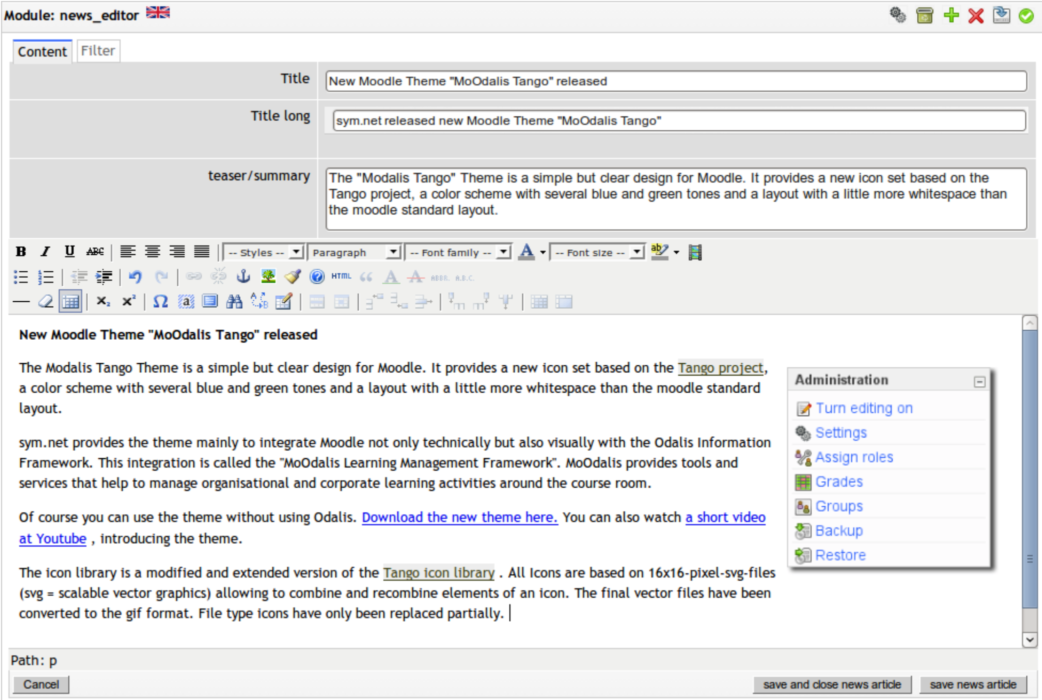


Fig.: Empty form of news editor to create a new article

Use to save the text from time to time, if you want to go on editing. Use to save and close the news editor after finishing.

15.5 Publish an article

Articles can be published time-controlled or/and within selected domains (or both).

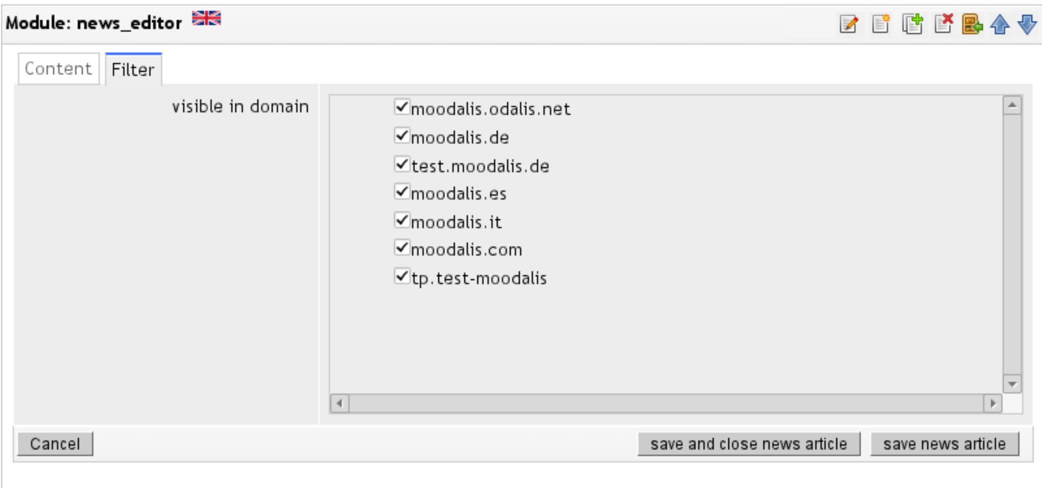


Fig.: *filter*-panel to publish news article (time- or/and domain-controlled)

Field Name	Description	Recommendation
Publish from ...	publishing period, start; if set to zero the article will be immediately published	not neccessary

to	publishing period, end; if set to zero article will remain published without time limit	not neccessary
visible in domain	published within a certain domain (f. g. only for de.company.com)	-
visible for users with home domain	visible for users that contain the matching field value *domain* in there profile	

NOTE: The availablilty of filters depends on the degree of customization. The filters shown in the screenshot are only examples of possible setups.

15.6 Further functions for the news editor

In the news area you will find further functions for the management of news articles

Fig.: Toolbar. Available functions from left to right: edit, create,copy, delete, archive, move up and/or move down (in case there is more than one news article).

15.6.1 Archive articles

To store an article in the archive click the most left icon (file cabinet with green arrow). The article will be moved to a folder specified be the administor.

15.6.2 Move articles

You can specify the order

1. news articles are shown on the news list (page/node which contains the news module) and
2. news teasers are shown within the news box.

Click the green arrows to move news up or down .

15.6.3 Delete articles

Click the trash icon to delete an article. After confirming the prompt the article will be ultimately deleted.

15.7 News modul configuration

15.7.1 Configuration options

Choose the edit mode for the whole page/node by clicking the edit icon within the top toolbar . The news editor will be rendered in edit mode

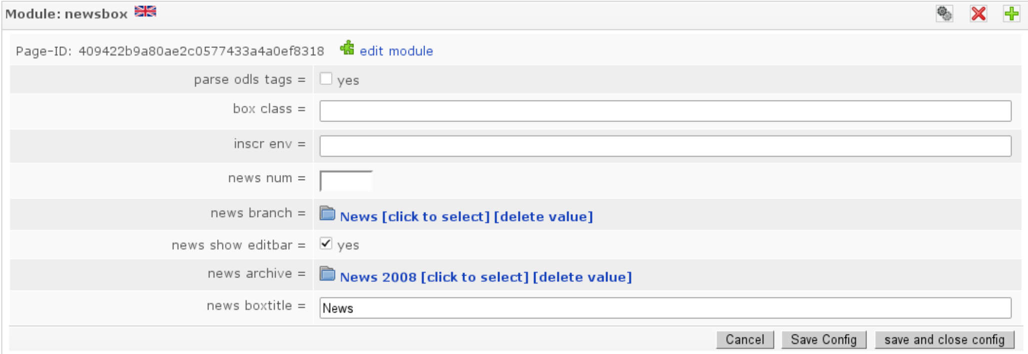


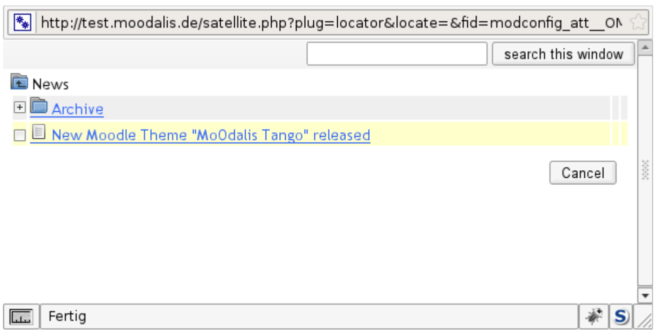
Fig.: News editor modul in edit mode

Field Name	**Description**
parse odls tags	if checked odls tags (e. g. variables such as username) will be dynamically replaced within the WYSIWYG-editor
box class	CSS class attached to the module
insc. env.	
news num	
news branch	choose branch that contains all news articles you would like to show within the news article overview (= node, which contains the news module)
news show edit bar	show or hide edit bar
news archive	choose node/folder where news are being stored
news box title	box title for the news module

15.7.2 How to select a folder/node for archiving news

NOTE: The configuration of an archive folder should be done by the administrator and should usually be valid for a longer period (e. g. a year). This option is not meant to be changed for archiving a single article or case-by-case.

Click on the link next to *news archive* and choose a folder/node within the *node selector* in the popup window:



Navigate through the site structure by either clicking an *folder up* icon or by clicking a link of the current branch; to find a subordinated folder click on the *plus* icon. Doubleclick to choose an item.

16 Advanced administration options

16.1 Interface labels

16.1.1 Introduction

Allmost all labes of the *Odalis LMS* interface are being stored in a database (there are some exceptions, where labels are part of custom templates). Labels stored in the database can be changed or translated with the inscription editor. Labels can be edited-in-place by

- activating the inscription mode and
- clicking the respective label.

After clicking on the label a popup window will open: it provides a database interface where the label can be changed or translations can be added. If no label is assigned to the control element yet, you can see an english inscription (the so-called *internal name*), which is the hard-coded equivalent to any label or its translations.

Example: The interface is in inscription mode and shows a form control with the label „add_category_below“: this is the hard-coded inscription, which can be transferred to a label of your choice (e. g. „A category can be added below“). While rendering the interface in normal mode, a database lookup is being made and the original inscription is replaced by the database entry for „add_category_below“. In this way, the original label can get as many as neccessary translations.

16.1.2 The inscription mode

To activate the inscription mode click the icon with a window containing an „A“ and a pen . All labels that can be edited will now be rendered as clickable links (even if they have been links before, however, now they refer to another URL, linking to an inscription database entry).

Click a link and the inscription editor will popup, showing an edit interface to change or translate the clhosen label.

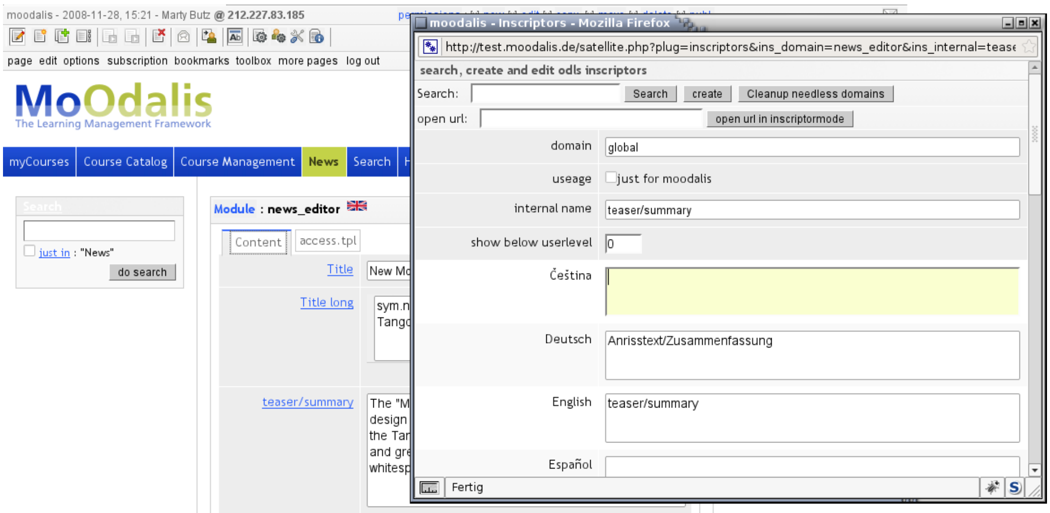


Fig.: Login page and popup window with inscription editor; the clicked label can be changed or translated.

16.1.3 The inscription editor interface

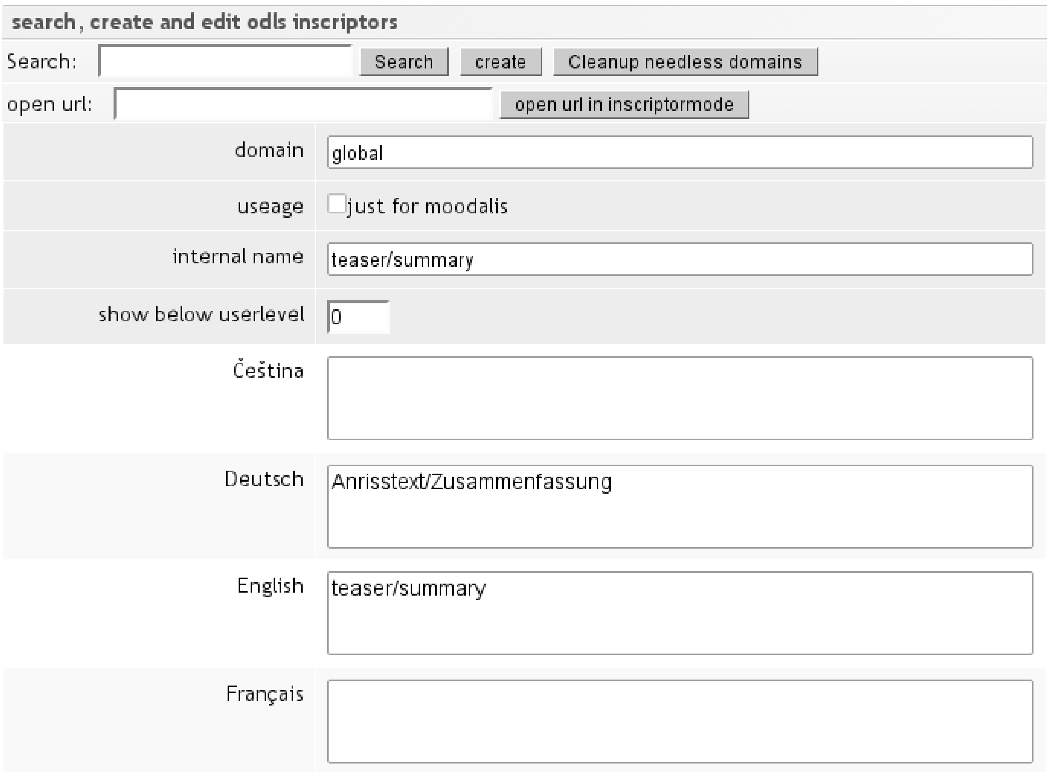


Fig.: Inskription editor in detail

Field Name	Des	Recommendation
Search	Search the database. You can search for an *internal name*, label or translation, e. g. if a label has to be changed or translated	-

	without knowing where exactly the label is being used in the interface (e. g. all buttons in the application labeled „ok“ should be labeled „save“: search for „ok“ and change the entry accordingly)	
Domain	Interface labels can be virtually grouped: e. g. division „A“ a wants the *internal name* „online_course“ to be show as „Online Course Room“, division „B“ as „Online Training“; the domane „A“ and „B“ will keep these linguistic domain separated. Please be shure that the used domain names are valid system variables.	Default value „all“
Usage	If checked odls software updates of interface labels will not overwrite organization specific labels	Should be checked by default; will protect installation against unwanted changes of interface labels.
Internal Name	The label as it is hard-coded in the programm code.	Do not change unless code is updated accordingly.
Show below userlevel	Labels can be hidden for special user levels; this applies e. g. to explanations, which are not necessary for advanced users	3 = experienced user; usually you can leave the default setting.
[Language]	Labels as shown in the interface for different languages	add translations as needed; fall back mode is usually English

16.1.4 Search for *internal names* or labels

A search function in the inscription editor enables to search for

- internal names and
- labels appearing anywhere on the interface

In case the search strings appear in different combinations you will find doubles or variations.

EXAMPLE: Search for „save“ shows several instances, where the internal name and the label contains the string „save“ (internal names: save_as, save_config; labels „Save Record“, „Save Search“).

INFO: Doubles found!

please choose

add_inscriptor_after_saving_name for all: add inscriptor after saving name
allow_search_sv for odls_actions: save search as...
allow_stt_sv for odls_actions: save statitics as report
disallow_search_sv for odls_actions: save search as...
disallow_stt_sv for odls_actions: save statitics as report
page_resides_in for all: page save
page_reside_or for all: page add after/in
reside for all: place page
save for all: save
save_as for all: save as...
save_close_module for all: save and close module
save_columns_as for true_db: save column config as
save_config for all: Save Config
save_disabled for all: 'saving' disabled
save_listview_config for all: save
save_load_search for all: save/load user querie
save_module for all: save module
save_node_metadata for meta_editor: save
save_record for all: Save record
save_search_as for all: save querie as
search_allow_save_search for search_preferences: allow saving queries
subm_save_dtr for all: save
subm_save_page_preferences for all: save
subm_save_server_preferences for all: save preferences
subm_save_user_data for all: save
subm_save_user_preferences for all: save

Fig.: Search result for internal names or with double or similar inscriptions.

If the list of search results is to long to scan visually, you can narrow the search by using the browser search function (usually control + f to search the content of the browser window).

The example screenshot shows different contexts, where the search string „save“ appears. Click a line and the inscription editor will show the internal name or label, which then can be edited or translated.

16.2 Page properties

16.2.1 Introduction

Any *node* in Odalis LMS

- contains content (text, forms, database views etc.) and
- has specific properties e.g. a specific position within the *tree* structure of a *Odalis LMS* application. This location is one of several *page properties*. Other properties concern the page title, description and access rights. The *page property*-panel provides access to edit these properties.

You can edit these properties by going to the node you like to edit and choose *menu > page > show properties* or by clicking the *page propertiy* icon in the toolbar .

16.2.2 Basic properties

Once you opened the page properties, you can edit basic properties on the panel *Title/Place/Link*:

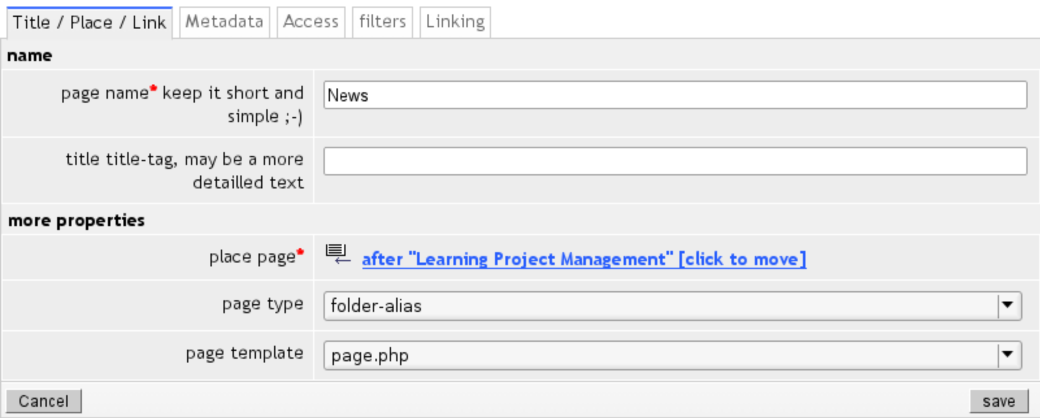


Fig.: Page properties *title/place/link*-panel

Field Name	Description	Recommendation
title (short)	displayed in the *global navigation*, the *local navigation* and e. g. in the *node selector*.	should be as short as possible, because usually displayed within the site's navigation

title (long)	displayed as title of the browser window, as mouseover of the short title in the navigation and other contexts	up to 256 characters
place	change the location of the node within the site structure; calls the *node selector*	as desired
type	provides functionality of the current node	default for ordinary content pages is *document*; within the repository e. g. *folder*
template	XHTML-template used to render the page	

(see Fehler: Referenz nicht gefunden Fehler: Referenz nicht gefunden), yo

16.2.3 Metadata

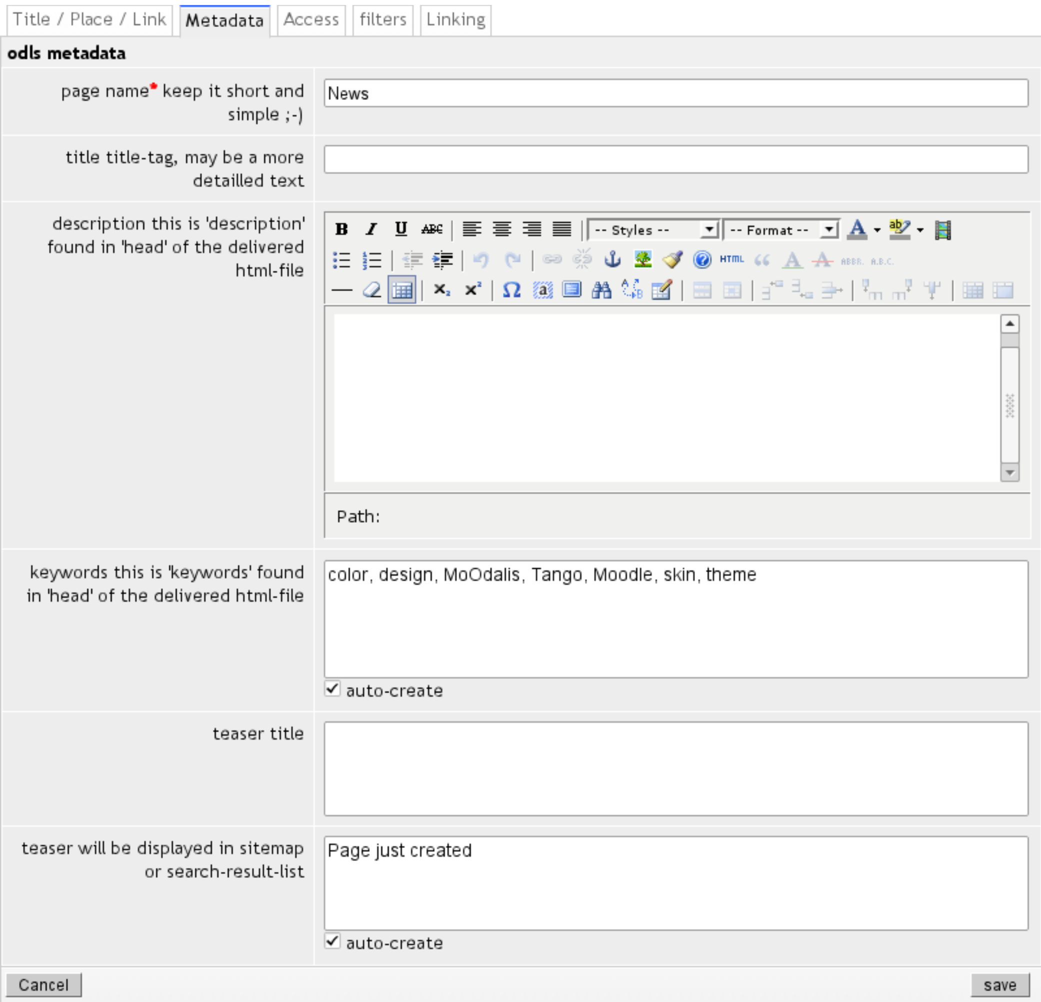


Fig.: Page properties *metadata*-panel

Field Name	Description	Recommendation
title (short)	displayed in the *global navigation*, the *local navigation* and e. g. in the *node selector*.	should be as short as possible, because usually displayed within the site's navigation
title (long)	displayed as title of the browser window, during mouseover on the short title in the	up to 256 characters

	navigation and other contexts	
description	page description (can be displayed in various contexts)	as desired
keywords	keywords characterizing the page content	as desired
teaser title	title for teaser	as desired
teaser text	teaser to summarize the pages content	as desired

16.2.4 Access: rights and roles

You can edit the access rights for the current node by choosing the *access*-panel. User groups have to be created in advance by the administrator before they will be displayed on the panel:

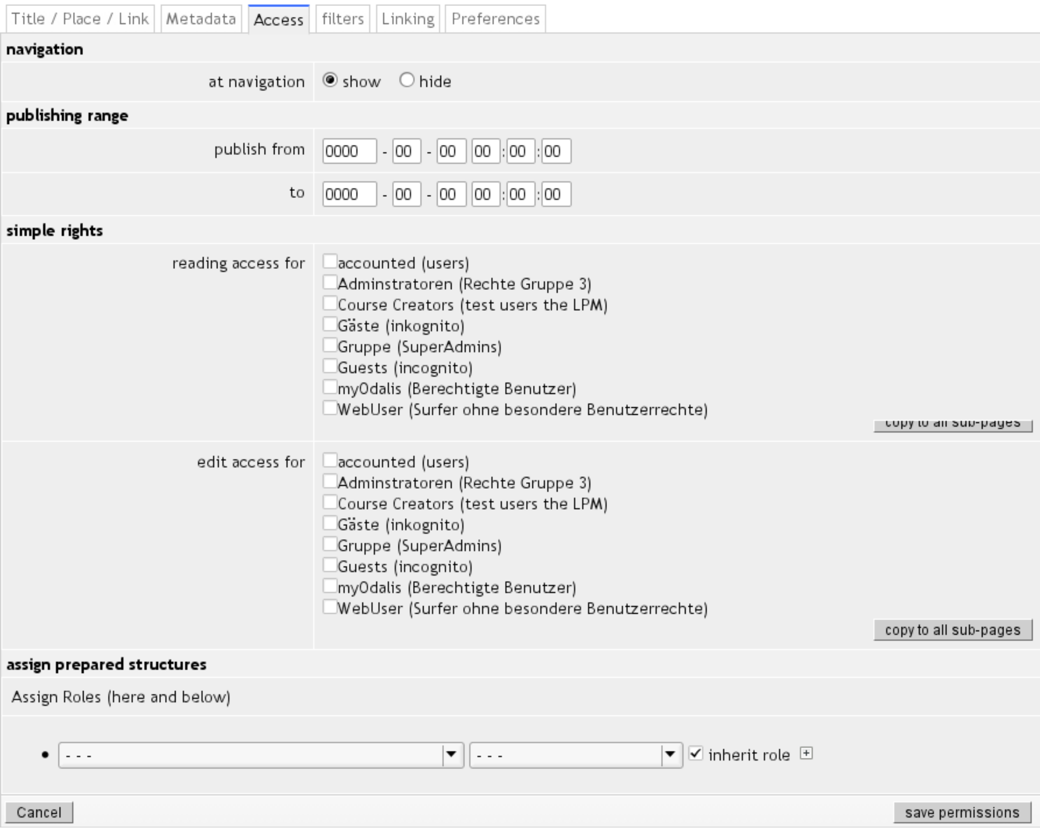


Fig.: Page properties *access*-panel

There are significant differences betweeen the (simple) *rights* and *roles*:

16.2.4.1 Simple rights

There are two kinds of simple rights: reading and editing permissions, which are granted only for the current node. These rights are simple in the way that only one basic capability e. g. reading a page is linked to certain user groups.

Simple rights can currently only be granted to user *groups*. Thus you have to group users in advance in the *user manager*, before you can link these users to certain rights. Afterwards you will find this group on the *access*-panel.

16.2.4.1.1 Inheritation of simple rights

Simple rights are not automatically inherited to the nodes below.

They can be assigned to the nodes below by using the button *copy to all sub pages* on the *access*-panel. All rights granted to the current node will be distributed once to the hierachically subordinated nodes.

> **EXAMPLE**: All pages within a category „For Teachers only“ should be accessible for the usergoup teacher. The category itself should not be editable (e. g. teacher should not rename the category). You can grand editing rights for this category, copy this right to all subpages and than remove the editing right only for the category „For teachers only“; as a result teachers wil be able to access the category and alter the containing nodes.

You can configure simple rights to be inherited by default while creating a new node. This is done by setting the variable `new_page_copy_parent_perms` e. g. in *server manager* or *Fehler: Referenz nicht gefunden*.

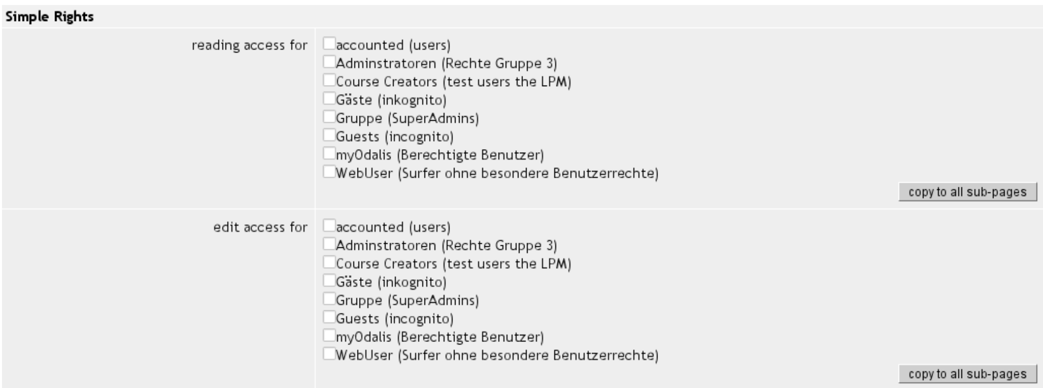


Fig.: Reading and editing rights can be granted to user goups at the current node; the rights can also be copied to the subordinated nodes by using the function/button *copy to all sub pages*.

16.2.4.2 Roles

In distiction from simple rights

- roles are predefined sets of simple rights,
- a role can contain different sets of permissions depending on the current tree position. Thus one and the same role can be dynamically redefined within to the *tree* context,
- within a role permissions will be *automatically inherited to the nodes below* (except you uncheck the *inherit* flag.
- roles can be assigned to single users as well as to user groups.

Fig.: One type of prepared access structures are roles. They can be assigned to users groups and single users.

The first select box beneath the section *assign roles* on the *access*-panel will show groups (see fig. above). You can change the role assignment here. If you want to assign a certain role to a single user, go to the *user manager* and choose the *assign roles* tab.

NOTE: If a user creates a page, he will be assigned the specified *default_author_role*. Usually this is the default role *node author* permitted to edit, move and delete the node. Regardless of where this page might be placed, the user will keep the role node author: she will constantly be regarded as *owner of the page*.

16.2.4.3 Example for the use of roles

Here is an example on how to meet some more advanced challenges. Let's say, you have three groups of jobs to do:

16.2.4.3.1 Managing the site

Site management implies management of users, granting access to certain areas, providing internationalized user interfaces, setting up variables like *supported_languages* and so on.

These are the typical jobs of an administrator. Put this user into the group „Super Admins“ or grant „global“ rights in the *user manager*:

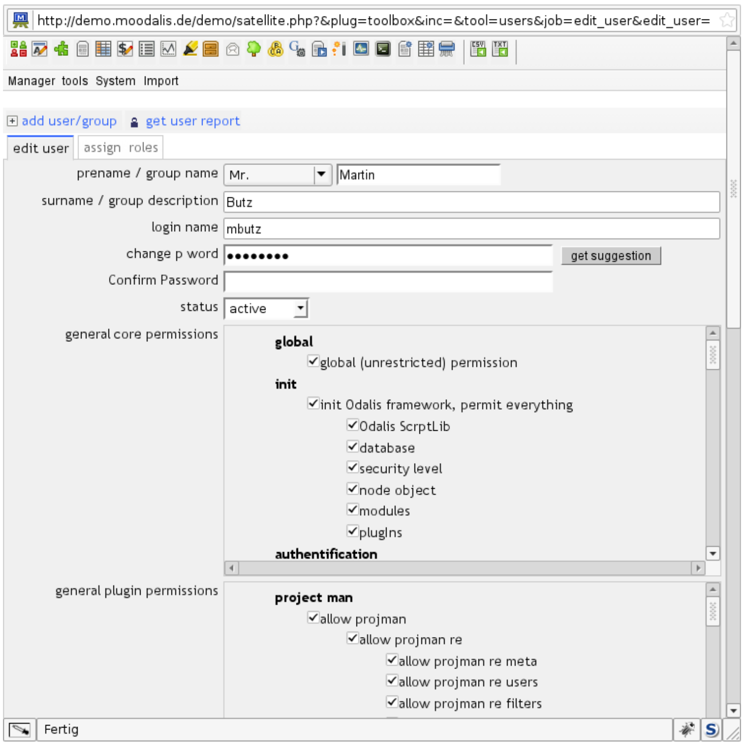


Fig.: A single user view in the user manager. Here you can f. e. grant global rights.

16.2.4.3.2 Construct and maintain a site structure

You will probably need categories, pages. Furthermore you will have to deal with navigational issues like redirecting or bypassing user requests.

This user is a *node creator*. *Odalis* provides this prototyped role, containing the following features:

- permission to create, edit, delete and move *node*s as well as defining the node as link to another,
- granting access to the node and
- define the *template*, the node will be rendered in.

16.2.4.3.3 Edit contents

An editor should edit content, provide uploaded files and media to the site vistors and so on. You can simply grant edit rights for certain areas via the *access*-panel.

16.2.4.4 Adding more complexity to the access right structure

1. You want the *node creator* to have advanced access only to certain areas of the site. These areas vary on the role holders department and country.
   Now think about varying the access rights and assigning these variations to all the sites areas where necessary versus a dynamic modell of access right attribution based on roles.
2. You want the *editors* to be able to create new pages within the *news area*, while only being able to edit the ones they have created in the first place. They also should not be allowed to see pages created by other *editors*; nevertheless all pages should reside in the same branch. On top of this, you want all *editors* to be able to assign their pages to other *editors* for translation. These translators may not be owners of the page, and should not be able to edit the original content. Additionally: Only the original author should be able to publish the translation (regardless of whether she knows Turkish). What would be needed here is a special permission set:
   - grant editing, but only for the Turkish translator,
   - do not handle over the page ownership and
   - do not let the translator publish the page.
3. You do not want site visitors to access certain areas. Nevertheless the they should be able to search the content of all nodes using full text search. Is this *read* permission?

Solution to challenge #1:

- Create a role *local creator* by using the *Fehler: Referenz nicht gefunden* and select *role* as variable format.
- Save role as global variable by selecting *server* as *class* and *default* as *group*.
- Give *users.roles* as *subclass*.
- Do not grant any rights, neither on *core*, nor on *plugins*.

This is the role you can use to provide access to any certain areas of your site. As the user enters these areas, more specific permission sets might be applied as variants of the role *local creator*.

- Again use the *Fehler: Referenz nicht gefunden* to duplicate the role.
- Set *page* as *class*.
- Set *vaild for page* to the desired starting node, below which the editing should be granted.

16.2.5 Filter

The *filter*-panel allows to provide information for preconfigured filters to work in an appropriate way (i. e. a category is only visible in the course catalog for certain domains).

The provided fields (= filter data) can vary according to a customers demand.

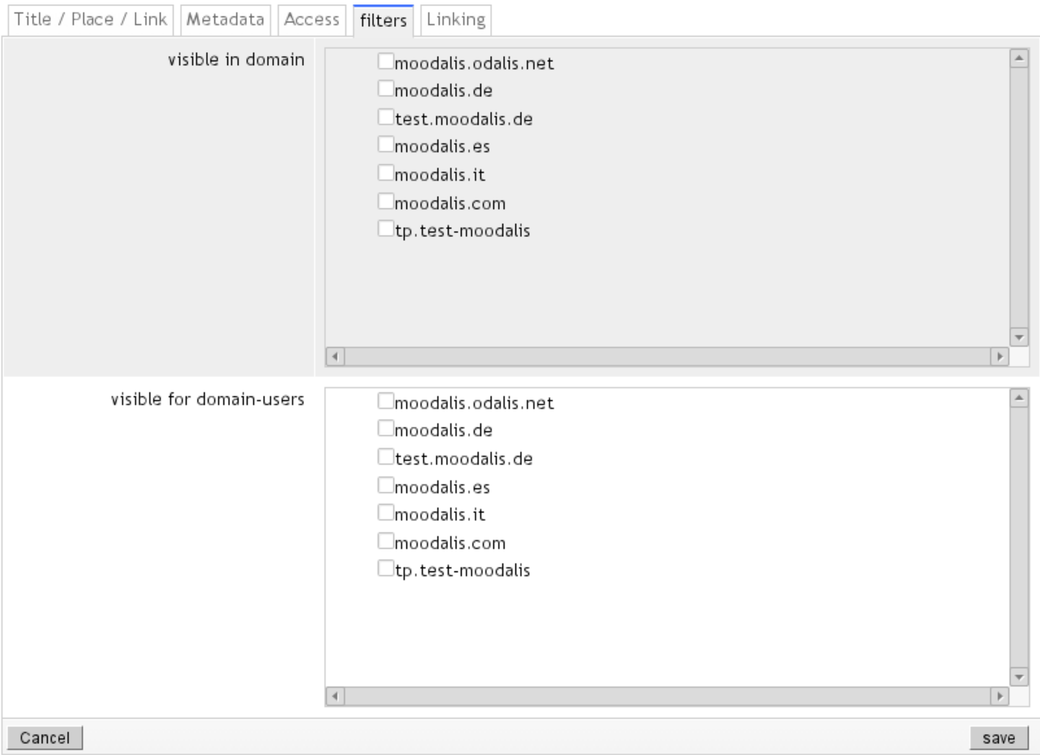


Fig.: Page properties *filter*-panel

16.2.5.1 Linking

The *linking*-panel allows to define a node as a link to another node or an external resource.

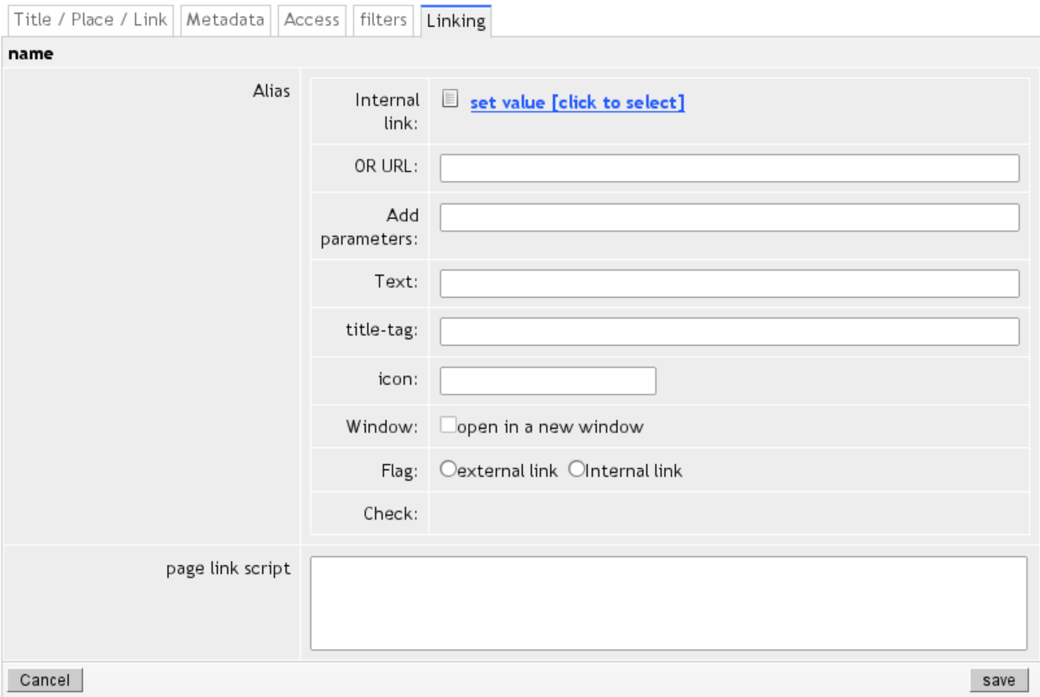


Fig.: Page properties *linking*-panel

17 Glossary

classroom training program

Any learning offering that takes place at a real world venue and at a specific date (e. g. classroom training course, lecture).

course catalog

A special view of the *LPM*'s *project tree* designed for users who want to browse the different training. The course catalog contains information about online and on site training courses such as title, description, date and fee. These data are provied by the *LPM* database.

course history

List of courses a user has participated in (as student, course editor etc.). The standard layout of *Odalis LMS* presents the section „myCourses“; here the user can choose to get a list of attended, finished, certified and recommended online and/or on site training courses.

curriculum (category type)

A curriculum in Odalis LMS is a collection of learning events, which can be grouped. Thus these learning events can be 1. presented as a single learning event within the course catalog, 2. users can be enrolled into all grouped learning events completing only one enrollment process. 3. In case of online course rooms the link to the course room can be displayed conditionally: If a user has attended/graduated/is certified in course „A“ course „B“ will be accessible, otherwise not.

event

Any single learning event in the *LPM*'s *project tree* such as a classroom training or an online course.

gradebook

Grades are scores attributed to participants in an online course. The gradebook is a repository of these grades. If the *LPM* needs to retrieve the results of the users, it will request the data from the integrated OS-LMS gradebook module.

group (category type)

A group is a loose binding of online or on site training courses, which will be visually grouped in the course catalog.

inscription mode

Almost all labes of the *Odalis LMS* interface are being stored in a

database (there are some exceptions, where labels are part of custom templates). Labels stored in the database can be changed or translated with the inscription editor. Labels can be edited-in-place by entering the inscription mode and clicking the respective label.
After having clicked a label a popup window will open: it provides a database interface where the label can be changed or translations can be added. If no label has been assigned to the control element yet, you can see an english inscription (the so-called *internal name*), which is the hard-coded equivalent to any label or its translations.

internal name

Original, hard-coded entry for an interface inscription stored in a database. This inscription can be replaced by any desired label, e. g. the *internal name* for the button „category_add“, can be replaced by „Add category“; the german version of the interface would display „Kategorie hinzufügen“.

global navigation

Navigation, that doesn't change irrespective of the page or area of *Odalis LMS*. In most cases its the 1st or 2nd level of the *tree*. Usually represented by a horizonally aligned list of links or buttons in the upper part of the browser window.

LPM

Learning project managment, site specific area represented by the *project tree*.

integrated OS-LMS

A *learning management system* is a software application for the administration, documentation, tracking, and reporting of training programs, classroom and online events, e-learning programs, and training content.Learning Management System (see: *http://en.wikipedia.org/wiki/Learning_management_system* for further explanation).

Currently Odalis LMS integrates a widespread Open Source LMS (called OS-integrated OS-LMS in this manual) originally developed by Martin Dougiamas; for further information about the system please visit http://www.moodle.org.

As both the integrated OS-LMS and Odalis LMS are Open Source it is legally without any problem to integrate the integrated OS-LMS as a module of Odalis LMS. Nevertheless due to trademark and copyright issues we are not able to name the integrated OS-LMS explicitely. Please refer to http://docs.moodle.org/en/License for further information.

local navigation

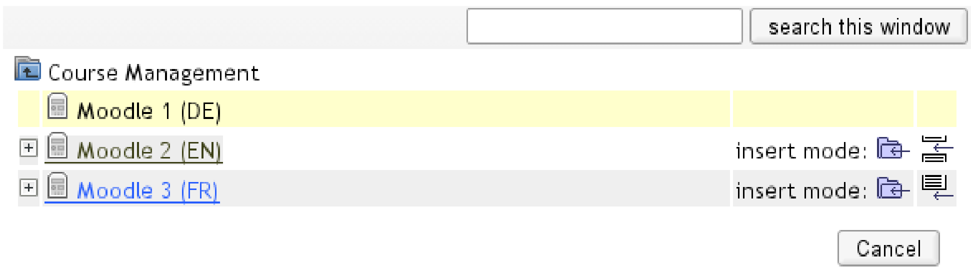
Navigation that changes according to the current item of the *global navigation*. In most cases nodes which are located below the 2nd level of the *tree*. Usually represented by a vertically align choice of links in the left column or an explorer tree widget.

node

A node is a single item of the *tree*. A node can contain manually inserted content (a page with text and images), a folder representation (e. g. in the repository), a database view (e. g. a report), a module (e. g. a forum) or can be a link to another node. Usually nodes can be reached via *global navigation* or *local navigation.*

node selector

tool to select a specific node usually showing the *tree* as a folder like structure:



The node selector is used if you want to change the location of the node within the site structure.

online training program

Any learning offering, which is provided via internet (e. g. online course room).

PHP

Programming language with which Odalis/Odalis LMS is implemented with. See: http://en.wikipedia.org/wiki/Php for further information.

project tree

a) All data relevant for learning projects within Odalis LMS organized in a hierarchical structure. Usually the tree is structured to mirror the organization structure or domains. The nodes can be edited, copied or deleted, new nodes can be inserted. The nodes do not contain online course rooms and course room content.
b) A represenation of a) as shown in the explorer like tree widget – is usually located in the left column, if the *global navigation* item *projects* is chosen. The currently chosen node is always highlighted.

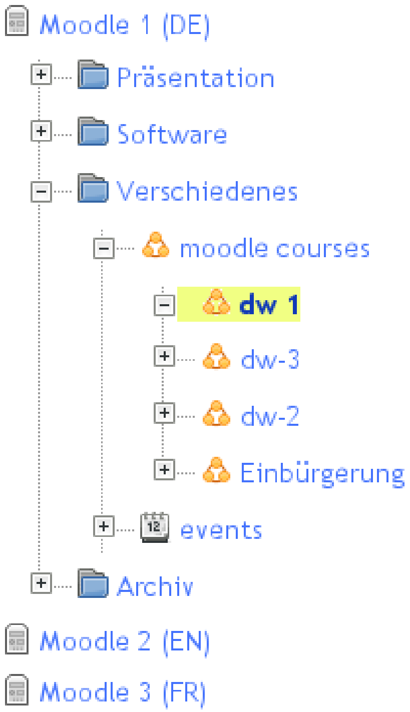


Fig.: Example of the project tree

SCORM

Sharable Content Object Reference Model (SCORM) is a collection of standards and specifications for web-based e-learning. Web based trainings arel often delivered as SCORM packages.
See:
http://en.wikipedia.org/wiki/Sharable_Content_Object_Reference_Model
for more detailed information.

server manager

To be completed

status or state (LPM)

Property of a user concerning the attendance of or responsibility for a area or event (category, classroom training course, online training course etc.). Certain set of states are linked to certain roles: an *administrator* or *teacher* may have the status *active* or *inactive* meaning that she is assigned to the learning event as responsible administrator or teacher. An attendee may have the status waitlisted, elapsed (waiting), Approval asked, Approval denied, elapsed (approval), waiting list & approval, waiting and approval elapsed, enrollment pending, booked, Graduated, Certified, cancelled
cancelled self replaced, cancelled min attendees, course cancelled
cancelled vendor, not enrolled, attended, not attended.
The different states of a user can be seen in the status history, which

can be accessed by clicking the blue info button next to the user entry on the *users*-panel within the LPM.

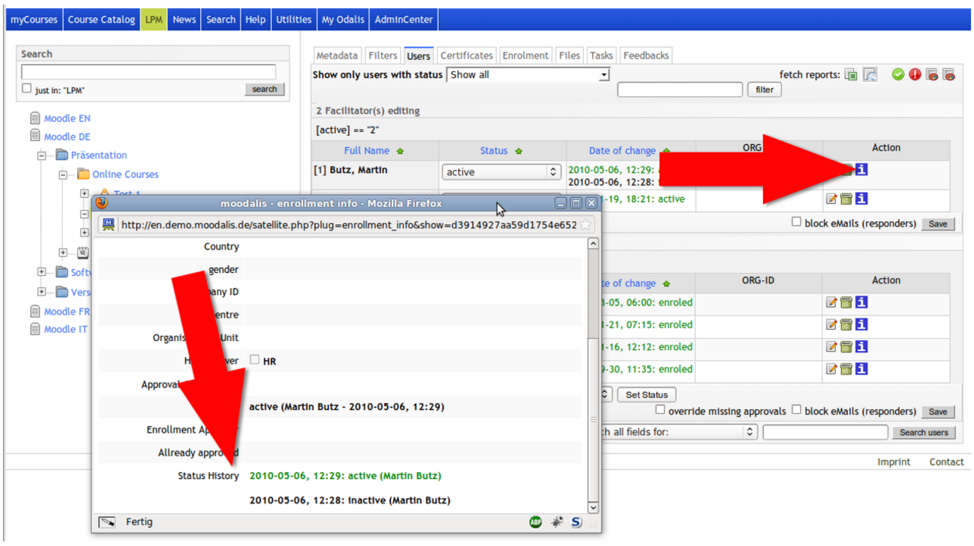


Fig.: The status history shows the changes of a users status with respect to her role and a node within the LPM (e. g. course attendance or editing teacher responsibilities for a whole category of courses). To see the status history of a user, go to the *users*-panel and click the blue info button within the uses row (right arrow). A popup window will open, which contains extended information about the user and the status history (left arrow).

template

A template is a container defined by a set of formating rules, which willbe used to render data (e. g. an XHTML template is used to present the content of an Odalis *node)*. Templates are used to render page content for the web browser, to send emails or to generate PDF files (i. e. certificates).

toolbar (application)

Set of icons at top of page. Available functions are accessible according to the access rights of the logged in user.

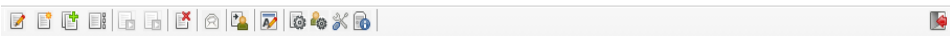


Fig.: The toolbar contains a configurable set of icons as shortcuts for several functions. Not visible for regular users.

toolbar (layout module)

Every layout module contains a toolbar at the top right corner:

Fig.: Default toolbar of layout modul with wysiwyg editor

Icon	Description
Gears	Module configuration (usually done by the administrator)

Garbage Can	Delete module
Green Plus Sigen	Insert a new module
Red Cross	Close module without saving = cancel: no changes of content will be saved
Hard Disk with Arrow	Save module content; leave module opened for further editing content
Green Badge with Hook	Close module and save content

toolbox

Set of administrative tools to configure and control *Odalis*. The toolbox can be triggered by clicking on the toolbox icon within the *toolbar (application)*.

tree

a) The content of a *Odalis LMS* system is organized in the form of a hierarchical tree structure. The tree contains pages or, to be more general, nodes that can have subordinated nodes in a variable number of hierachically organized levels.
b) The node structure is represented and browsable by an explorer widget. The *project tree* is a selection of of the whole tree.

user manager

Odalis tool to administer users and user groups. You can open the *user manager* by clicking on the user manager icon in the *toolbox*.

WBT

Individualized instruction delivered over public or private computer networks and displayed by a Web browser. WBT is not downloaded CBT, but rather on-demand training stored in a server and accessed across a network. Web-based training can be updated very rapidly, and access to the training controlled by the training provider (see: http://www.webbasedtraining.com/primer_glossary.aspx, date: 2011-04-11)

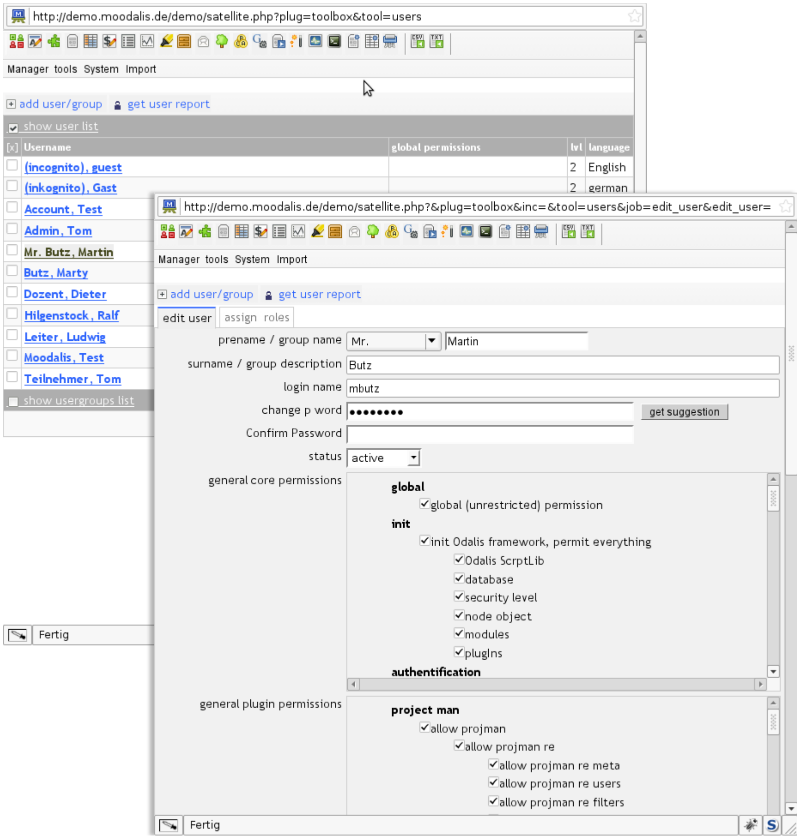


Fig.: A user list view and a single user view in the user manager.

value list

List of possible values for a database field; usually presented as a form select widget. Example: currencies (EUR, USD).

WYSIWYG

What you see is what you get: Editors that can display text and illustrations in a very similar way to the final published output.