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Automatic enrolment and re-certification process

imc Learning Suite

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Content

1 Summary

This document describes the process of automatic enrolment and re-certification like it is available with IP 21 in the imc Learning Suite. In addition to the configuration for the standard scenarios, the individual configuration parameters are described in detail and examples for the different settings are given.

2   Details

2.1   Basic scenarios and setups

2.1.1   Automatic enrolment

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

- he is registered at the system,
- another course is completed,
- A specific skill is reached.

In general, any condition supported by the target group concept can be chosen as a trigger for enrolment, such as attributes, course status or skills.

2.2   Re-certification

Re-certification is an extension of automatic enrolment and only works for course templates supports the following scenario. This function can be used if the participant must regularly refresh a qualification acquired in the past after a certain time or by a certain date in the year:

- Which participants needs to be recertified can be determined by rules in the target groups.
- The period between re-certifications can be freely determined.
- The compulsory course to be repeated may consist of the same or new learning content.
- If the course is completed, a competence or certificate can be assigned to it.

This is mapped in the imc Learning Suite in a simplified way as follows:
- Creation of a target group that uses rules to define the participants who are to take part in the re-certification.
- Creation of a course template that is the basis for re-certification.
- Creation of a first course based on the course template (automatic or manual).
- Creation of an automatic enrolment in the course template for the created target group.
- Execution of the automatic enrolment, either manually or through the nightly, automated execution.
- Automatic or manual course creation by using the course template to which participants are enrolled based on the re-certification settings.

2.3 Process setup

The following diagram describes the steps of setting up an automatic enrolment and a re-certification cycle. An example for the setup can be found in the chapter "Process description".
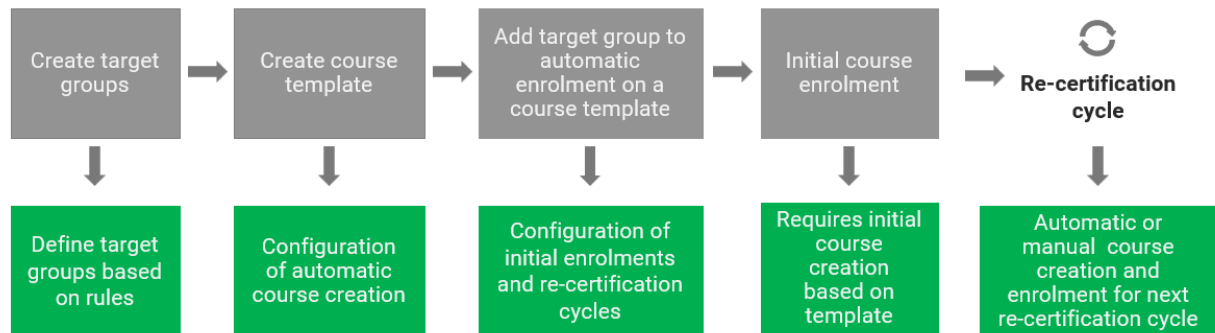

Fig. 1:   Setup of re-certification cycle

2.4 Automatic enrolment and re-certification settings

The following figure shows the set-up dialogue for an automatic enrolment and re-certification on a course template.

The setting options are divided into three different areas (see. Fig. 2.2):
- General Settings
- Enrolment Settings
- Re-certification Settings

Rules and status of automatic enrolment   ×

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

BU: EC Business Unit

General Settings

Identification ⓘ
[Optional ▾]

Enrolment status* ⓘ
[Personal syllabus ▾]

Days to finish ⓘ
[30]

Enrolment Settings

Activation date ⓘ
[🗓]

☑ Automatic adding ⓘ

☑ Automatic cancellation ⓘ

☑ Automatic course enrolment ⓘ

Initial due date based on ⓘ
[Due date on DD/MM ▾]

Relative due date ⓘ
[31] [Dec ▾]

Due date ⓘ
[🗓]

Re-certification Settings

☑ Re-certification ⓘ

☑ Re-enrol canceled and failed users ⓘ

☑ Automatic status change after due date ⓘ

Days for status change after due date ⓘ
[14]

Change of status to ⓘ
[Failed ▾]

Deadline type ⓘ
[Always valid on DD/MM ▾]

Deadline ⓘ
[31] [Dec ▾]

Re-certification interval ⓘ
[12] [Months ▾]

☐ Reset SCORM status ⓘ

[**OK**]   [**Close**]

Fig. 2:   Set-up dialogue for an automatic enrolment on a course template.

2.4.1 General settings

In this section, settings can be defined which influence the overall process.

#	Parameter	Description
1	Identification	Flag for automatic enrolment. It is possible to mark the course so that it is displayed as mandatory, optional or for compliance purposes. This flag can be used when configuring panels. For example, a panel can be configured to show mandatory courses to the learner.
2	Enrolment status	The enrolment status defines which list the participant is placed on when the enrolment job runs. To configure a re-certification process at template level, users must be set to the Personal syllabus.
3	Days to finish	Determines the number of days within a user must complete a course. An initial due date is set automatically. If the due date is also defined, the later date applies. For a re-certification with a due date, this value also determines when a user is enrolled on the course, i.e. due date minus days to finish defines the enrolment date. If a value for the Buffer days is entered under Configuration > Enrolment, this value is considered when calculating the enrolment date. (Due date - days to finish - Buffer days = enrolment date in the re-certification process). If no value is set for days to finish, the default value stored in the system configuration applies, usually 30 days. This configuration can be found under Configuration > Enrolment in the 'Automatic enrolment' section.

Table 1:   General Settings

2.4.2   Enrolment settings

In this section, settings can be defined which influence the enrolment on courses / course templates or learning paths. Settings which influence the re-certification process will be explained in the next chapter.

#	Parameter	Description
1	Activation date	The earliest time at which the group/the job profile are included in the automatic enrolment. The group or job profile are ignored by the automatic enrolment until the defined time.
2	Automatic adding	If activated, the current members of the deposited group are enrolled to the course/course template during operation according to the defined set of rules. If the setting is not activated, no initial enrolment of members who are in the group at the time of enrolment is carried out.
3	Automatic cancellation	If enabled for a course / learning path, participants who have not yet completed the course / learning path and now are no longer members of the assigned group, will be canceled from the course / learning path. If enabled for a course template, participants who are now no longer members of the assigned group, will be removed from the course template. Regardless of the setting, participants who are no longer members of the assigned group will be canceled from courses based on the template which they have not yet completed.
4	Initial due date based on	The type of due date that should be used when calculating the user due date during the enrolment process. Possible options are - Fixed due date - Due date based on DD/MM
5	Relative due date	You can set the day and month here. The enrolment due date will be calculated with reference to this day and month relative to the current date. If the day and month from this field are set after the current date than the due date year will be the same as the one from the current date otherwise the due date will be set to the next year at the same day and month.

#	Parameter	Description
6	Due date	The users in the group must have completed the course/learning path by the specified date. If the learner is enrolled after the due date, the due date for this learner is calculated as follows. Enrolment date + days to finish. If the learner is enrolled shortly before the specified due date (due date - days to finish), the enrolment date + days to finish is also used.

Table 2:   Enrolment Settings

2.4.3   Re-certification settings

If the re-certification should also be used the following settings need to be considered in addition.

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

#	Parameter	Description
1	Re-certification	This setting activates re-certification and triggers the calculation of the next due date and the respective enrolment date.
2	Re-enrol canceled and failed users	This option allows failed and canceled participants to be enrolled in the next available course to continue the re-certification process.
3	Automatic status change after due date	This setting allows the system to change the status of users who have passed the due date and have the status 'enrolled' or 'In progress' to the specified status.
4	Days for status change after due date	Number of days from the due date after which the status change should take place. Only active if **Automatic status change after due date** is active.
5	Change of status to	If the automatic status change is activated, users are moved to the status selected here x days after the due date. Only active if **Automatic status change after due date** is active.
6	Deadline type	Here you can set whether the course is either "Due on DD/MM " or whether the date is calculated depending on the individual course completion of the participant.

#	Parameter	Description
7	Deadline	Day and month for the due date. Used in conjunction with the re-certification interval to calculate the year of the next due date. **Mandatory field** if "Due on a certain date" is selected as the deadline type.
8	Re-certification interval	For example, every 12 months or every 90 days. **Mandatory field** if re-certification is ticked.
9	Reset SCORM status	If this is activated, the SCORM status of the content stored in the courses is reset for all participants when they automatically enrol a course. If this is not activated, the SCORM status is not reset. This means that a participant who has already worked with the learning medium can continue to work with this learning status after opening the course. In individual cases, this can mean that course parts are already marked as worked on / completed.

Table 3: Settings for re-certification

2.5   Additional configuration parameters

The configuration of automatic enrolment and re-certification is carried out per course template and group. In addition, the system provides some platform wide configuration parameters which will also be taken in consideration for the calculation of the due date and automatic enrolment. The configuration of the following parameters can be found under Configuration > Enrolment in the section "Automatic enrolment".

2.5.1   Buffer days

In addition to the above-mentioned parameters, there is a basic configuration for so-called Buffer days, which are also stored under Configuration > Enrolment.
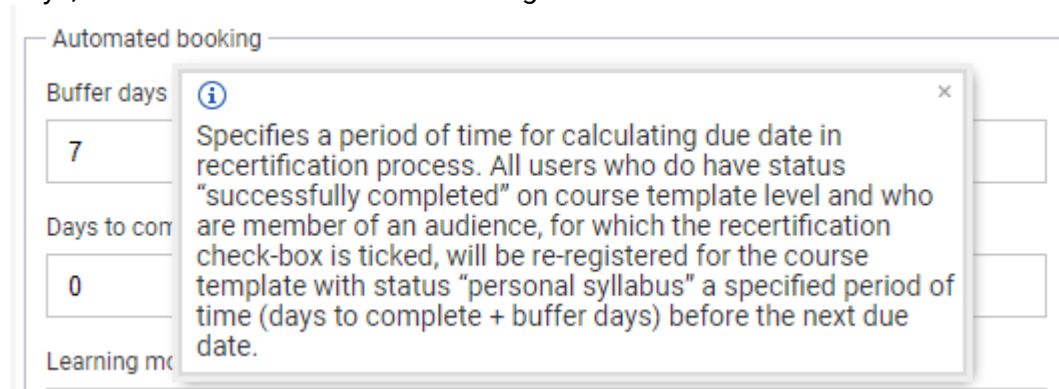

Fig. 3:   Configuration of Buffer days

The default value is **7** days.

With the help of the Buffer days the enrolment date will be calculated. The Buffer days will be added to the days to finish. This is important for very tight time schedule because the time for the learner to work on the course will be very short because of a small number of days to finish. In this case the enrolment date will be moved to an earlier date.

Calculation on enrolment date:

Enrolment date = Due date – Days to finish – Buffer days.

2.5.2   Days to finish

The parameter "Days to finish" determines the number of days during which a user must complete a course. This automatically determines the due date.
If the due date is also defined, the later date applies.
In the case of re-certification with a deadline, this value defines when a user is enrolled onto the course, i.e. deadline minus days to finish defines the enrolment date. (Enrolment date = next due date - days to finish - Buffer days)
If no value is entered, the default value stored in the system configuration applies, usually 30 days.

2.6 Course template – Personal syllabus information

After automatic enrolment has been carried out on a template, the users of the corresponding target groups can be found on the personal syllabus of the course template (Course templates > Participant management - see Fig. 4). The meaning of the individual columns is explained in table 4.

Fig. 4:   Personal syllabus view.

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

#	Column name	Description
1	Date of assignment	Date of assignment to the course based on this course template.
2	Participant status (template)	Participant status on template level
3	Participant status (course)	Participant status on course level of the current course
4	Current enrolment	Unique identification number of the course the participant is currently enrolled on.
5	Due date	Due date for the current re-certification run.
6	Next due date	Due date of the next run of the re-certification.
7	Date most recent completion	Date of the last conclusion of a course created from this template.
8	Automatic course enrolment	Setting of the respective enrolment
9	Re-certification	Setting of the respective re-certification

#	Column name	Description
10	Underlying target group	Name of the target group through which the participant was enrolled onto the course template.
11	Identification	Setting of the respective enrolment

Table 4:   Column explanation of personal syllabus

User status course vs. user status course template

User status on course level	User status on course template (personal syllabus)
No course available, user not booked on any course	Personal syllabus
Enrolled	Enrolled
Started	In progress
Concluded (Successfully)	Successfully completed
Failed	Fail
Waiting	Waiting
Canceled	Canceled

Table 5: User status course vs. user status course template of personal syllabus

2.7   Calculation of the next due date and enrolment

2.7.1   Calculation of the next due date

If a user completes a course of a course template on which he is enrolled for re-certification, the status display for this person in the course template changes to "Successfully completed". If the follow-up course is created based on the course template manually or automatically, the system checks whether, the user has the status "Successfully passed" on the course template and
the user is a member of a group for which re-certification is activated.
When entering the re-certification cycle with the second course the next due date calculation differs from the calculation when the learner is already in the cycle.

Next due date calculation when entering the re-certification cycle for DD/MM:

- If the conclusion date of the first course is **before** DD/MM of the **same** year → the next due date is DD/MM of the same year.
- If the conclusion date of the first course is **after** DD/MM of the same year → the next due date is DD/MM of the **next** year.

Next due date calculation when learner is already in the re-certification cycle for DD/MM:

Then the next due date is calculated for the user. This is done depending on the type of deadline:
- "Always valid on DD/MM":
    "Next due date" = "Deadline in DD/MM" + "Re-certification interval"

Due date based on conclusion:

    "Next due date" = "Date of most recent completion" + "Re-certification interval".

If a user has not yet completed any courses in the template, no next due date is set. To deal with this case and enable the learner to continue the re-certification cycle following settings must be configured accordingly:

- "Automatic status change after due date" with "Days for status change after due date" (in days)
- "Change status to" (selection of status: passed, failed or canceled).
- "Re-enrol canceled and failed users", if for "Change status to "canceled or failed is selected.

2.7.2   Calculation of the next enrolment date

The enrolment date will be calculated based on the formula:

Enrolment date = "Next due date" - "Days to finish" - "Buffer days"

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

Here it also applies that the status of the course template is changed to "Personal Syllabus". In addition, the learner is enrolled directly onto the next course if "Automatic course registration" is activated in the automatic enrolment rule and a course available for enrolment of the template is available.

In the following you'll find a list of examples how the enrolment date is calculated.

Days to finish	Buffer days	Deadline type	Deadline	Re-certification interval	Enrolment date for the 2nd run (Next due date - Days to finish - Buffer days)
30	7	Always valid on DD/MM	31st of December	12 months	24th of November of each year
30	0	Always valid on DD/MM	31st of December	12 months	1st of December of each year
30	7	Always valid on DD/MM	31st of December	6 months	2 enrolments per year • 24th of November of each year • 24th of May each year
30	7	Based on conclusion	Personal course end date	12 months/ 6 months	Individual enrolment date per user based on personal course end date, e.g. concluded on the 12th of May, for a 12-month interval the next due date will be 12th of May the upcoming year, The enrolment for the next course will take place 5th of April

Table 6: Examples for Enrolment date calculation

2.8   Handling for participants who have the status "enrolled" or "in progress" after due date

Not all users complete a course until the given due date. Formerly, only users, who successfully completed the course were considered for the next certification period. To also let learners of the status "enrolled" and "in progress" continue with a next course, we have introduced the new setting "Automatic status change after due date" (see Fig.: 5) in the section "Re-certification settings".

If this setting is selected the text field to specify the days after which the status change shall take place will be activated. Here a 3-digit number can be entered which defines the number of days after the due date when the status change will be executed.

It is possible to select a status to which the user status will change. The following options are available:

- Canceled
- Passed
- Failed
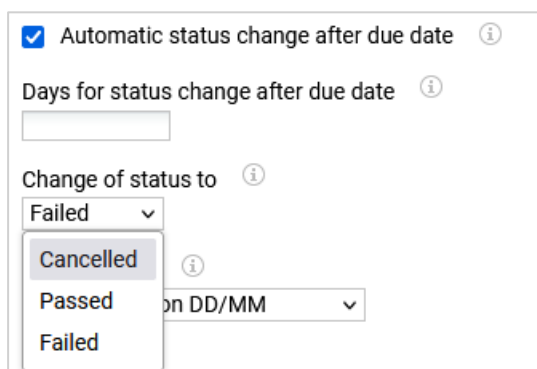
Fig. 5:   Setting "Automatic status change after due date"

In combination with the setting "Re-enrol canceled and failed users" these learners will be considered for the re-certification cycle. If this setting is not active those learners will not be part of the cycle.

2.9   Handling for participants who failed the course or have the status canceled (also multiple cancelations)

The new option "Re-enrol canceled and failed users" allows failed and canceled participants to be enrolled in the next available course and to continue the re-certification process. Also, participants who are canceled multiple times are considered. This option can only be selected if "Re-certification" is selected (see Fig.: 6).

Fig. 6: Screenshot of setting "Re-enrol canceled and failed users"

2.10   Important notes

A change in the automatic enrolment settings only applies to learners who have not yet been entered in the learning specification of the course template. This means only for "new" learners who have not yet been considered by the automatic enrolment.

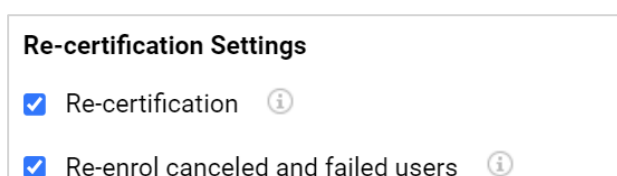If automatic enrolment is started manually, it is carried out in two steps. In the first manual execution, the calculation of the next due date is carried out and in the second execution, the calculation of the due date and the enrolment are carried out.

The number of Buffer days is set to 7 by default and can be changed via the configuration.

If no value is set for "Days to finish", the value from the configuration is taken (default: 30 days).

For the deadline type "Always valid on DD/MM" it is recommended to always select a multiple of 12 months.

The metatags "Release for automatic course enrolment" and "Allow multiple enrolments" must be activated on the course template to enable re-certification.

If a user should not be enrolled directly when the process is set up, the activation date can be set. As soon as the activation date is reached, the CronJob will also consider users of the group for which the activation date is defined.

The CronJob "ParticipantAutomaticRegistration" needs to be configured to run automatically for the automatic enrolment, or it can also be triggered manually directly in the participant administration of the course template.

The CronJob "ParticipantAutomaticStatusChangeJob" needs to be configured to run automatically for the status change of user with the status "Enrolled" or "In Progress".

3   Examples

The following settings apply to all examples:

- All learners are assigned via the same target group
- Identification: Required
- Enrolment status: Personal syllabus
- Automatically adding: Yes
- Automatic cancellation: Yes
- Activation date: Blank
- Automatic course enrolement: Yes
- Re-certification: Yes
- Reset SCORM Status: Yes
-

Further configuration of Buffer Days = 10 and the default value for "Days to finish" = 30. Can be carried out via "Configuration > Enrolment" in the section "Automated enrolment".

3.1   Examples for initial set up of the Re-certification Cycle

In this example the learner will be automatically enrolled on the first course created based on a template. The table will show the different results depending on the progress of the learners on the first course with different settings.

3.1.1 Initial fixed due date/ Re-certification Deadline DD/MM

Initial Settings	User	Date of as-signment	Date of last conclusion	Particip. status (template)	Particip. status (course)	Due date	Next due date	Enrolment-date
Initial fixed due date: 2024-12-31 **Days to finish:** 30 **Deadline-type: Always valid on DD/MM** **Deadline:** 12-31 **Re-certification interval:** 12 months	Learner 1	2024-01-10		In Progress	In Progress (course 1)	2024-12-31		
	Learner 2	2024-01-10	2024-06-20	Pers. Syllabus	Passed (course 1)	2024-12-31	2025-12-31	2025-11-21
	Learner 3	2024-12-15	2024-12-22	Pers. Syllabus	Passed (course 1)	2024-12-31	2025-12-31	2025-11-21
	Learner 4	2025-03-01		Enrolled	Enrolled (course 2)	2025-03-31		

Table 7: Examples for Initial fixed due date/re-certification deadline DD/MM

For learner 1 and 2 we have a fix due date, which will be taken for the learner as initial due date for the first course based on the template. Learner 2 has already completed the first course so for him the next due date for the second course will be calculated based on the Re-certification interval of 12 months and the deadline type: Always valid on DD/MM.
Learner 2 will be enrolled based on this status to course 2 of the cycle on 2025-11-21. This date is calculated by:

Enrolment date = Next Due date – Days to finish – Buffer days (here 10 days).

If the learner (Learner 3) is enrolled at less than 30 days before the defined initial due date, the date will be calculated as follows: Curent date/enrolment date + days to finish = initial due date.

If the learner (Learner 4) is enrolled after the initial due date, the date will be calculated as fol-lows: Current date/enrolment date + days to finish = initial due date (same calculation like as above).

If initial fixed due date is selected and **no initial due date** is chosen, the due date calculation will be by current date (enrolment date) + days to finish.

3.1.2 Initial relative due date/ Re-certification Deadline DD/MM

Initial Settings	User	Date of as-signment	Date of last conclusion	Particip. status (template)	Particip. status (course)	Due date	Next due date	Enrolment-date
Relative initial due date DD/MM: 31. Dez	Learner 1	2024-01-10		In Progress	In Progress (course 1)	2024-12-31		
Days to finish: 30 **Deadline-type: Always**	Learner 2	2024-01-10	2024-06-20	Pers. Syllabus	Passed (course 1)	2024-12-31	2025-12-31	2025-11-21
valid on DD/MM	Learner 3	2024-12-15		Enrolled	Enrolled (course 1)	2025-01-14		
Deadline: 12-31 **Re-certification interval:**	Learner 4	2025-01-10		Enrolled	Enrolled (course 2)	2025-12-31		
12 months	Learner 5	2024-01-10	2024-06-20	Pers. Syllabus	Passed (course 1)	2024-12-31	2025-12-31	2025-11-21

Table 8: Examples for Initial relative due date/re-certification deadline DD/MM

In Example 2 a relative initial due date is configured. The only difference between example 1 and 2 can be seen for Learner 4.
Learner 4 Is enrolled January 10th, 2025, then so he will get his due date on Dec 31st 2025 while Learners enrolled in 2024 will have the initial due date on Dec 31st 2024.

3.1.3   Initial relative due date/ Re-certification Based on Conclusion

Initial Settings	User	Date of assignment	Date of last conclusion	Particip. status (template)	Particip. status (course)	Due date	Next due date	Enrolment-date
Relative initial due date **DD/MM:** 31. Dez	Learner 1	2024-01-10		In Progress	In Progress (course 1)	2024-12-31		
Days to finish: 30	Learner 2	2024-01-10	2024-06-20	Pers. Syllabus	Passed (course 1)	2024-12-31	2025-06-20	2025-05-11
Deadline-type: based on conclusion	Learner 3	2024-12-15		Enrolled	Enrolled (course 1)	2025-01-14		
Re-certification interval:	Learner 4	2025-01-10		Enrolled	Enrolled (course 2)	2025-12-31		
12 months	Learner 5	2024-01-10	2024-08-31	Pers. Syllabus	Passed (course 1)	2024-12-31	2025-08-31	2025-07-21

Table 9: Examples for Initial relative due date/re-certification deadline based on conclusion

In example 3 a relative initial due date is configured. The deadline-type for the re-certification cycle is configured to "based on conclusion". Based on this each learner will have an individual next due date as well as an enrolment date after passing a course (see Learner 2 and 5).

3.1.4   Initial relative due date/ Re-certification Based on Conclusion (12-month cycle)

Initial Settings	User	Date of assignment	Date of last conclusion	Particip. status (template)	Particip. status (course)	Due date	Next due date	Enrolment-date
Relative initial due date **DD/MM:** 31. Jul	Learner 1	2024-01-10		In Progress	In Progress (course 1)	2024-07-31		
Days to finish: 30	Learner 2	2024-01-10	2024-06-20	Pers. Syllabus	Passed (course 1)	2024-07-31	2025-12-31	2025-11-21
Deadline-type: always valid on DD/MM	Learner 3	2024-12-15		Enrolled	Enrolled (course 1)	2025-01-14		
Deadline: 12-31	Learner 4	2025-01-10		Enrolled	Enrolled (course 2)	2025-12-31		
Re-certification interval: 12 months	Learner 5	2024-07-15	2024-12-22	Pers. Syllabus	Passed (course 1)	2024-12-31	2025-12-31	2025-11-21

Table 10: Examples for Initial relative due date/re-certification deadline based on conclusion 12 months

3.2　　　　Example of Customer Use Cases

The customer has many different instructions in which he must train his employees. This is a mix of online, blended learning and classroom training.

The intervals at which the trainings need to be refreshed vary depending on the training. There are annual, biennial, triennial and quinquennial intervals.

The amount of work in the company varies throughout the year, as production in the food sector is focused on the harvest season. Training therefore takes place at times when capacity utilization is lower. In the customer's case from 1st of March to 31st of July. This must be considered when creating the courses so that they are planned during this period.

Overdue and failed users must not necessarily pass the course in the same year before the season, but they shall be considered for the next course in the next training period of next year with the due date 31st of July. To be able to do so, overdue users will be set to failed after, e.g. 7 days after the due date has passed and failed users will be scheduled for the next course in the subsequent year.

Step 1) For the below example we assume a current date of 24.6.2024.

In the following we will explain how to configure the initial due date and the re-certification cycle. The date of assignment of the template defines the enrolment date of the initial course 1.
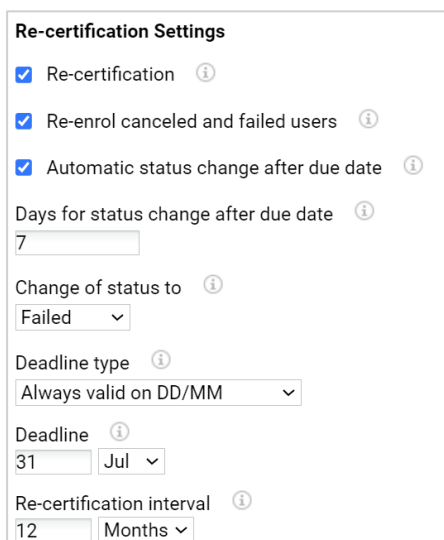
This example shows a relative initial due date configured. The deadline-type for the re-certification cycle is configured to "DD/MM". Based on this each learner will have the same next due date as well as the same enrolment date after passing a course (see Learner 2 and 5).

Initial Settings	User	Date of as-signment	Date of last conclusion	Particip. status (template)	Particip. status (course)	Due date	Next due date	Enrolment-date
Relative initial due date **DD/MM:** 31. Jul **Days to finish:** 30 **Deadline-type: Always valid on DD/MM** **Deadline:** 07-31 **Re-certification interval:** 12 months **Buffer days (in Config.):** 123	Learner 1	2024-03-01		In Progress	In Progress (course 1)	2024-07-31		
	Learner 2	2024-03-01	2024-06-20	Pers. Syllabus	Passed (course 1)		2025-07-31	2025-03-01
	Learner 3	2024-06-24		Enrolled	Enrolled (course 1)	2024-07-31		
	Learner 4	2024-06-10		Canceled	Canceled (course 1)	2024-07-31		
	Learner 5	2024-06-15		Failed	Failed (course 1)	2024-07-31		

Table 11: Customer use case

Step 2: We assume a current date of 24.6.2025 for explaining the re-certification cycle
The following re-certification settings will be used to meet the requirements of the customer in this use case.

Fig. 7: Screenshot of Re-certification settings

To consider the canceled and failed learners for the re-certification the Re-certification checkbox needs to be set as well as the checkbox "Re-enrol canceled and failed users". In addition, it is possible to include overdue and enrolled users of course 1 to be considered in the re-certification process. In this example after 7 days the status of the overdue and enrolled users will be changed to "Failed".

Initial Settings	User	Date of as-signment	Date of last conclusion	Particip. status (template)	Particip. status (course)	Due date	Next due date	Enrolment-date
Relative initial due date DD/MM: 31. Jul **Days to finish:** 30 **Deadline-type: Always valid on DD/MM Deadline:** 07-31 **Re-certification interval:** 12 months **Buffer days (in Config.):** 123	Learner 1	2024-03-01	2024-06-25	In Progress	In Progress (course 2)	2024-07-31		
	Learner 2	2024-03-01	2025-05-20	Passed	Passed (course 2)		2026-07-31	2026-03-01
	Learner 3	2024-06-24		Enrolled	Enrolled (course 2)	2024-07-31		
	Learner 4	2024-06-10		Enrolled	Enrolled (course 2)	2024-07-31		
	Learner 5	2024-06-15		Enrolled	Enrolled (course 2)	2024-07-31		
	Learner 6	2024-08-01		Enrolled	Enrolled (course 2)	2025-07-31		
	Learner 7	2025-04-01		Enrolled	Enrolled (course 2)	2025-07-31		

Table 12: Customer case

Learner 2 has passed course 2 on the 2025-05-25 and got enrolled to the course 3 on the 2026-03-01, according to the calculation:

Due date − Days to finish − Buffer days = 31.7.2026 − 30 days − 123 days -> 1.3.2026

Learner 3 was overdue for course 1 and his status was changed to failed after 7 days after the due date of course 1. The failed and canceled Learners 4 and 5 are enrolled to course 2 in the same way as learner 3 due to the above settings. For Learner 3-5 the enrolment date for course 2 is the same.
For Learners 6 and 7 the course 2 is the initial course because they are new hires and booked on their initial course.

4   Process description

Preparation tasks for the Re-certification process

- Create some users.
- Create a target group, to which your users will be assigned based on a rule. Simple example: Rule is based on a location, so all users of a specific location will be assigned to your target group. This is also to test, if the cancellation is working. Users which will change their location will no longer be part of your target group and if automatic cancellation is active in the rule set, the users should be canceled from the course template and the corresponding courses.
- Creation of a course template.
- Add the target group to course template on the tab "Automatic registration" and define your rule set like the following eexample. See Fig. 8.
    - General Settings
        - Identification: Required
        - Enrolment status: Personal syllabus
        - Days to finish: 30
    - Enrolment settings:
        - Activation date: empty
        - Automatic adding: true
        - Automatic cancellation: true
        - Automatic course enrolment: true
        - Initial due date based on: Due date on DD/MM
        - Relative due date: 31 December
    - Re-certification settings:
        - Re-certification: true
        - Re-enrol cancelled and failed users: true
        - Automatic status change after due date: true
        - Days for status change after due date: 14
        - Change of status to: Failed
        - Deadline type: Always valid on DD/MM
        - Deadline: 31 December
        - Re-certification interval: 12 months
        - Reset SCORM: status: true

Rules and status of automatic enrolment   ×

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

BU: EC Business Unit

General Settings

Identification ⓘ
[Optional   ▾]

Enrolment status* ⓘ
[Personal syllabus ▾]

Days to finish ⓘ
[30   ]

Enrolment Settings

Activation date ⓘ
[   ][▦]

☑ Automatic adding ⓘ

☑ Automatic cancellation ⓘ

☑ Automatic course enrolment ⓘ

Initial due date based on ⓘ
[Due date on DD/MM ▾]

Relative due date ⓘ
[31   ] [Dec ▾]

Due date ⓘ
[   ][▦]

Re-certification Settings

☑ Re-certification ⓘ

☑ Re-enrol canceled and failed users ⓘ

☑ Automatic status change after due date ⓘ

Days for status change after due date ⓘ
[14   ]

Change of status to ⓘ
[Failed   ▾]

Deadline type ⓘ
[Always valid on DD/MM   ▾]

Deadline ⓘ
[31   ] [Dec ▾]

Re-certification interval ⓘ
[12   ] [Months ▾]

☐ Reset SCORM status ⓘ

[**OK**]   [**Close**]

Fig. 8: Set-up dialogue for an automatic enrolment on a course template.

- Start the processing manually (manual start of the CronJob "ParticipantAutomaticRegistration". Normally the CronJob is configured to run automatically every night).
- All users of your target group should be now listed on the "Personal Syllabus" tab. (see Fig. 4: Personal syllabus view)
- Create a course based on your template. Can also be done via automatic course creation Run the CronJob "ParticipantAutomaticRegistration"
- The Participants should be enrolled on the course with the initial due date defined in rule set.
- Go to your course and change the status of you participants on course level to be concluded.
- Now the next due date on template level will be calculated based on your Deadline type setting and the Re-certification interval (e.g. 12 months)
  - Always valid on DD/MM → e.g. 31st of December the following year
  - If you have chosen "based on conclusion" as deadline type: → e.g. if the learner has concluded the course to-day, next due date will be today in 12 months.
- Create a second course.
- Learners will be enrolled when the following date arrives:
  "Next due date" - "Days to finish" - "Buffer days" is before or on today's date.
  The CronJob should be scheduled daily, so that the enrolment are considered for all users. Because the enrolment date can be quite different especially if the due date is calculated based on conclusion.
- To be continued for every re-certification period.

Excluding users from recertification process:

An employee in the target group does not have to complete this recertification for certain reasons. What needs to be done? It is not an option to remove the user from the target group, as the target group can also be used for other purposes. To remove a user from the recertification, this can be done via the 'Exceptions' tab of the participant administration of the course templates.

Under the 'Exceptions' tab, you can explicitly add users who should not be included in the recertification process. On the other hand, users who are not part of the target group can also be integrated into the process.

5 Additional implementations to support the re-certification process

In the following we will describe some additional implementations which are supporting the re-certification process in general.
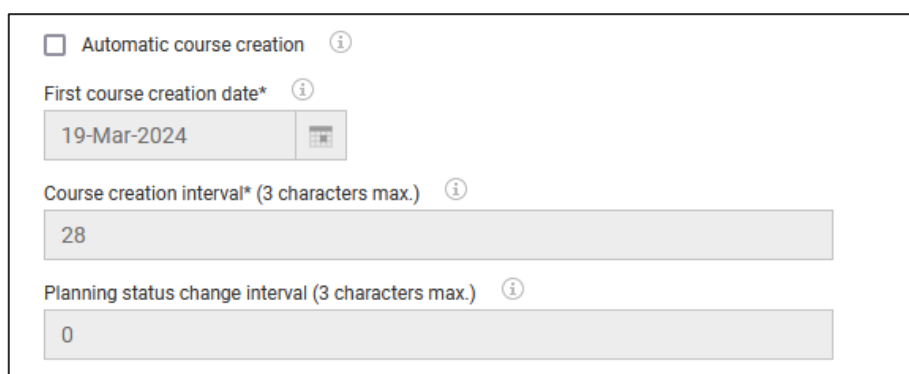
5.1 Automatic course creation

As the examples from the use cases in Chapter 3 show, considerable effort is required to create the courses needed to recertify participants.

At course type level, you can define whether, based on the templates derived from this type, courses should be created automatically in future using a CronJob at a freely definable interval. The CronJob to be used is **de.imc.clix.comp.edu.course.automaticcreation.AutoCourseCreationJob**

5.1.1 Attribute "automatic course creation"

The attribute "Automatic course creation" is a checkbox to initially define if the automatic course creation should be enabled. This setting is to be found on the Description tab of a course type. If this is set to true, we have four additional settings which appears on course template level.

- Automatic course creation
- First course creation date: The first course creation date defines when the course is automatically created for the first time.
- Course creation interval: The course creation interval defines after how many days the course is automatically created.
- Planning status change interval: The planning status change interval defines the number of days after which the planning status is changed from locked to released.

Fig. 9: Automatic course creation setting

With this configuration it is possible to configure an automatic process, so that there is no need for a manual creation of courses each year resp. re-certification period.

If you are creating date depended courses, you need to check the course dates because of the **course creation interval** it might be possible that course start and end dates are during a weekend or public holiday. In these cases, a **manual correction** of the course dates is needed.

Then the next course would be automatically created after the number of days as specified in the course creation interval. The course is always created from the latest published version of the course template. It is important to choose the first course creation date after the scheduled run of the CronJob otherwise automatic course creation would fail.

After the first run of CronJob, this field would be disabled and administrator would be informed about the "Next course creation date" with the help of "Next course creation date" field. This is a read only field and is shown only if automatic course creation is enabled and the CronJob has once run for creating the courses automatically.

Also, by default, the planning status of the automatically created course would be taken from the course description tab of the course template. In case the planning status has been specified as locked, the course would be released after the number of days (minimum 1) specified in the "Planning status change interval". If a course should be released directly, the planning status at course template level should be set directly to released.