Program management: User Interface

Document control

Abstract:	This document contains the user interface design and explains screens and on screen items in detail.		
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Summary of Changes: Assignment process	**Version**	**Date**	**Description**

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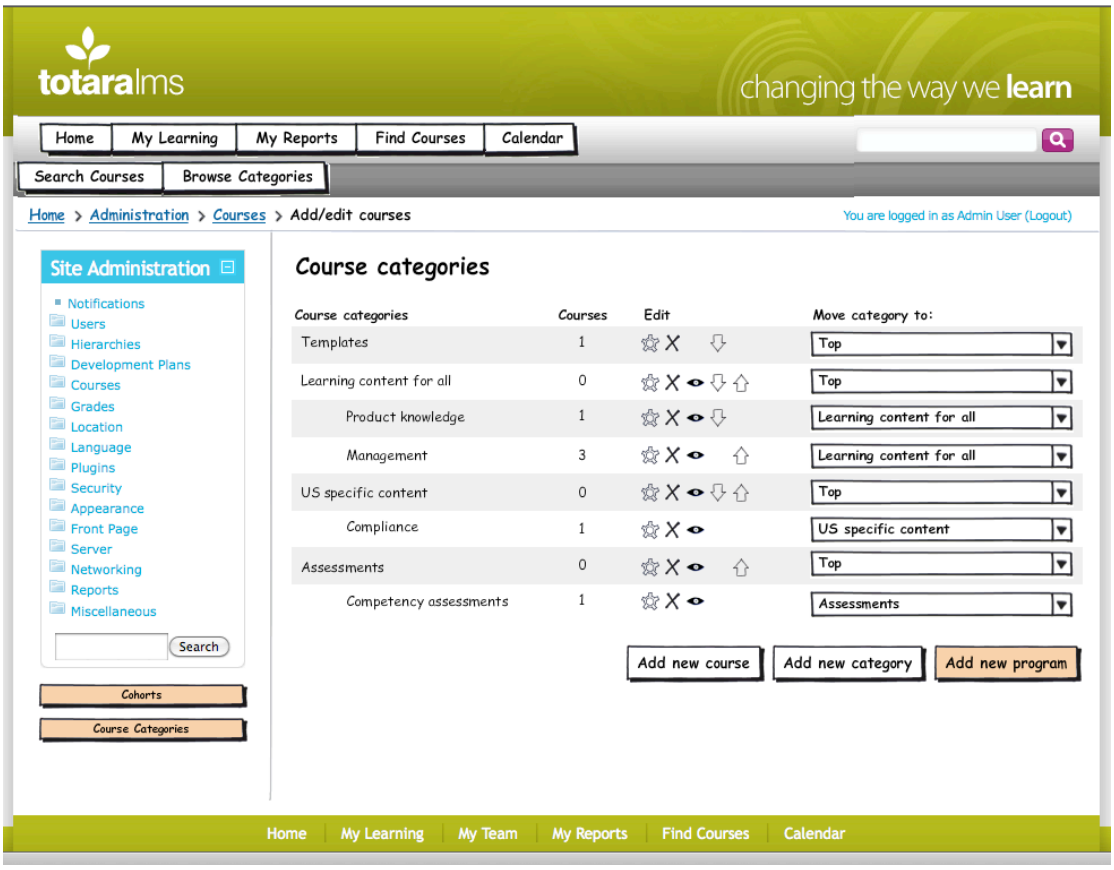
PM01: Course categories

The course categories page shown below already exists within the administration menu, find under Courses > Add/edit courses. From this page an admin can create a new program.



Screen reference: PM01.png

Element	Comment
Left-hand menu 'Cohorts' and 'Course categories' buttons	These are only present on the wireframes to allow easy navigation between sections. Within Totara these links are found within Users (for Cohorts) and Courses (for Course categories).
'Add new program' button	New button on page to allow access to the program creation screens. The location of the program within the course categories is set at PM02 Program settings.

PM02: Program settings

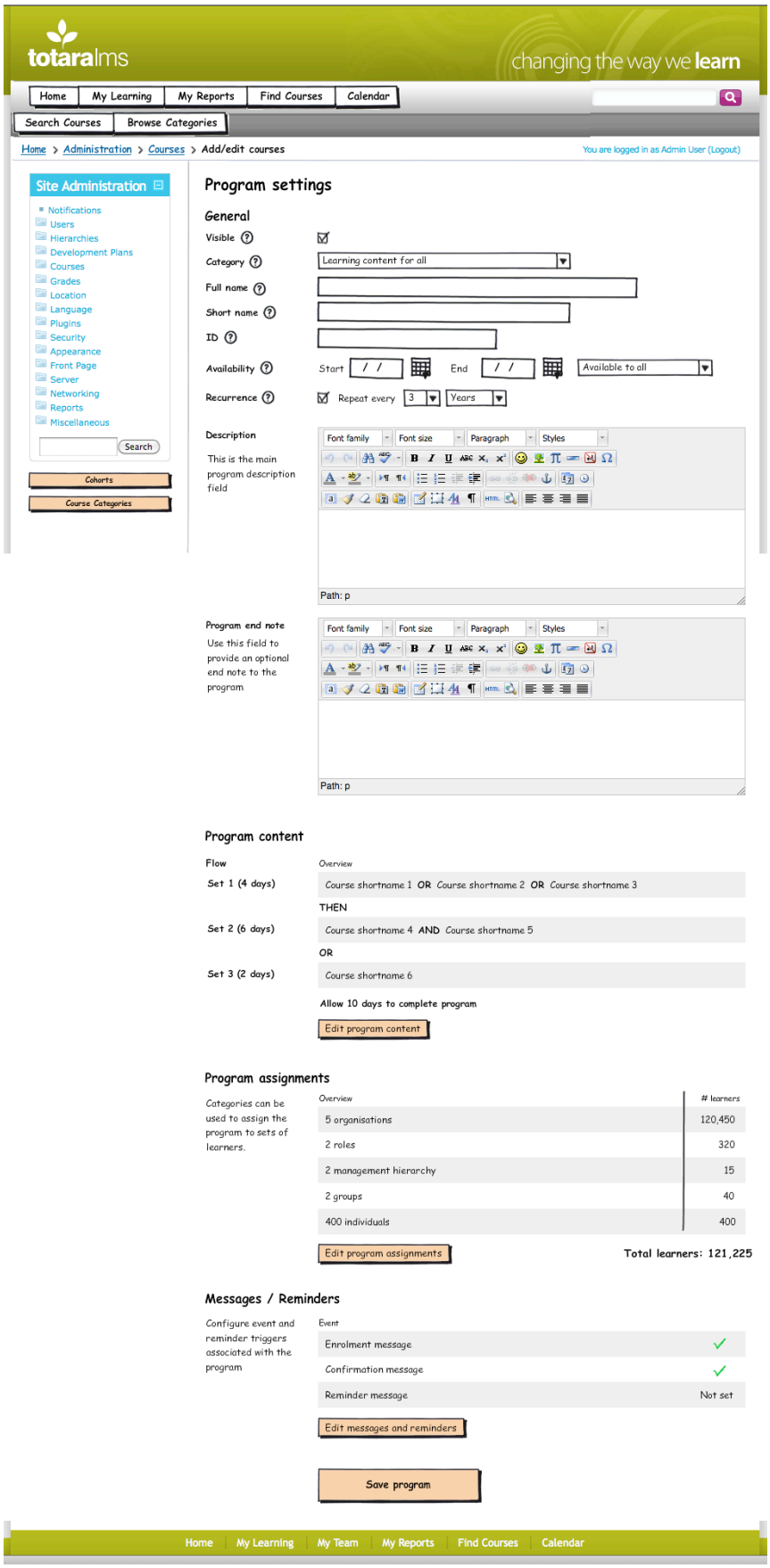
The Program settings screen is shown for both creating new and editing an existing program.
If the program was being edited a clear statement of the number of learners already enrolled on the program must be shown at the top of the page (similar to number of learners shown at the top of the exception report. See PM07-01 for details). The affect of editing an existing program must be handled carefully and any changes made must be confirmed before being applied.
The program settings screen is broken down into sections:

- General
- Program content
- Program assignment
- Messages / Reminders

Aside from the general information, this screen is intended to provide an overview of the component parts that make up a program (content, assignment, messages and reminders). The editing of these components takes place via sub-screens that are referenced in the comments table that follows the screen below.

When editing an existing program, the settings screen would be populated. For more detail on this see Use Case 1.5.

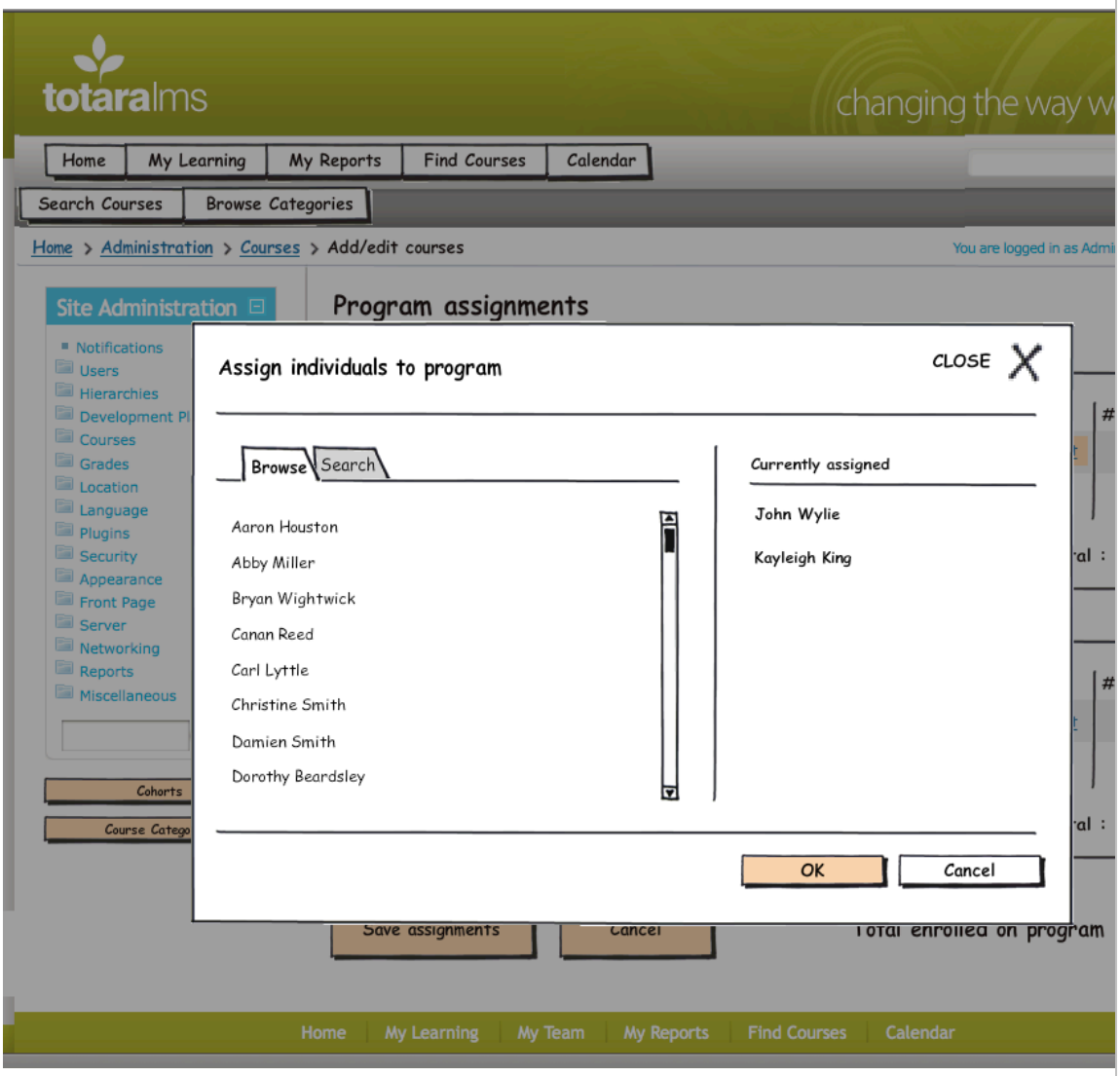
Screen reference for screen shown on next page is: *PM02.png*


totaralms
changing the way we learn
Home
My Learning
My Reports
Find Courses
Calendar
Search Courses
Browse Categories
Home > Administration > Courses > Add/edit courses
You are logged in as Admin User (Logout)
Site Administration
Notifications
Users
Hierarchies
Development Plans
Courses
Grades
Location
Language
Plugins
Security
Appearance
Front Page
Server
Networking
Reports
Miscellaneous
Search
Cohorts
Course Categories
Program settings
General
Visible
Category
Learning content for all
Full name
Short name
ID
Availability
Start
End
Available to all
Recurrence
Repeat every
3
Years
Description
This is the main program description field
Font family
Font size
Paragraph
Styles
Path: p
Program end note
Use this field to provide an optional end note to the program
Program content
Flow
Overview
Set 1 (4 days)
Course shortname 1 OR Course shortname 2 OR Course shortname 3
THEN
Set 2 (6 days)
Course shortname 4 AND Course shortname 5
OR
Set 3 (2 days)
Course shortname 6
Allow 10 days to complete program
Edit program content
Program assignments
Categories can be used to assign the program to sets of learners.
Overview
learners
5 organisations
120,450
2 roles
320
2 management hierarchy
15
2 groups
40
400 individuals
400
Edit program assignments
Total learners: 121,225
Messages / Reminders
Configure event and reminder triggers associated with the program
Event
Enrolment message
Confirmation message
Reminder message
Not set
Edit messages and reminders
Save program
Home
My Learning
My Team
My Reports
Find Courses
Calendar

Element	Comment
Visible	Checkbox controls visibility of the program to regular users. Visibility is also set on the course category screens by selecting the 'eye' icon next to the program name (see Use Case 1.4)
Category	Dropdown sets the parent category of the program. Categories are created on screen PM01. Programs can be moved between categories from both PM01 (see Use Case 1.3) and PM02 (by changing the category dropdown and clicking Save program button).
Full name	The full name for the program.
Short name	The short name for the program.
ID	The program ID number.
Availability	Sets the dates when the program is visible to regular users and to whom the program is available. Options within the available to dropdown are inline with the general Moodle/Totara settings for courses.
Recurrence	Checkbox activates recurrence. Repeat every [number] [days, weeks, months, years]. Help documentation is important to explaining this setting.
Description	Main program description field.
Program end note	Optional field to provide information to the Learner, shown at the bottom of the page within the Learners view (see LP04: Program detail).
Program content	Summary of content (courses) that make up the program, defined by the arrangement of sets and their relationships. 'Allow X days to complete program' is the minimum time required to allow learners to realistically achieve the program. (see PM03-01: Program content for details).
Program assignment	Overview of the assignment. In the sub screens (PM04-01: Program), these categories can be used to assign the program to sets of learners. The number of learners for each set plus the total number of assignments helps sense check before saving the program. The functionality can impact upon thousands of learners hence the need to check before applying. See PM04-01: Program for more details.
Messages / Reminders	Overview of the messages set for the program. There are two default messages required for each program then admin has ability to create messages and reminders as required. ***See PM04-8: Add individual to program*** Lightbox interface used to select individuals to add to the assignment of a program.

Shown when 'Add individual to program' button is clicked from PM04-01 Program assignments.

As the number of individuals assigned to a program will be significantly less than assigning organisations, roles, mangers or cohorts; confirmation lightbox is not required and OK button returns to PM04-01 and updates the Individuals set.



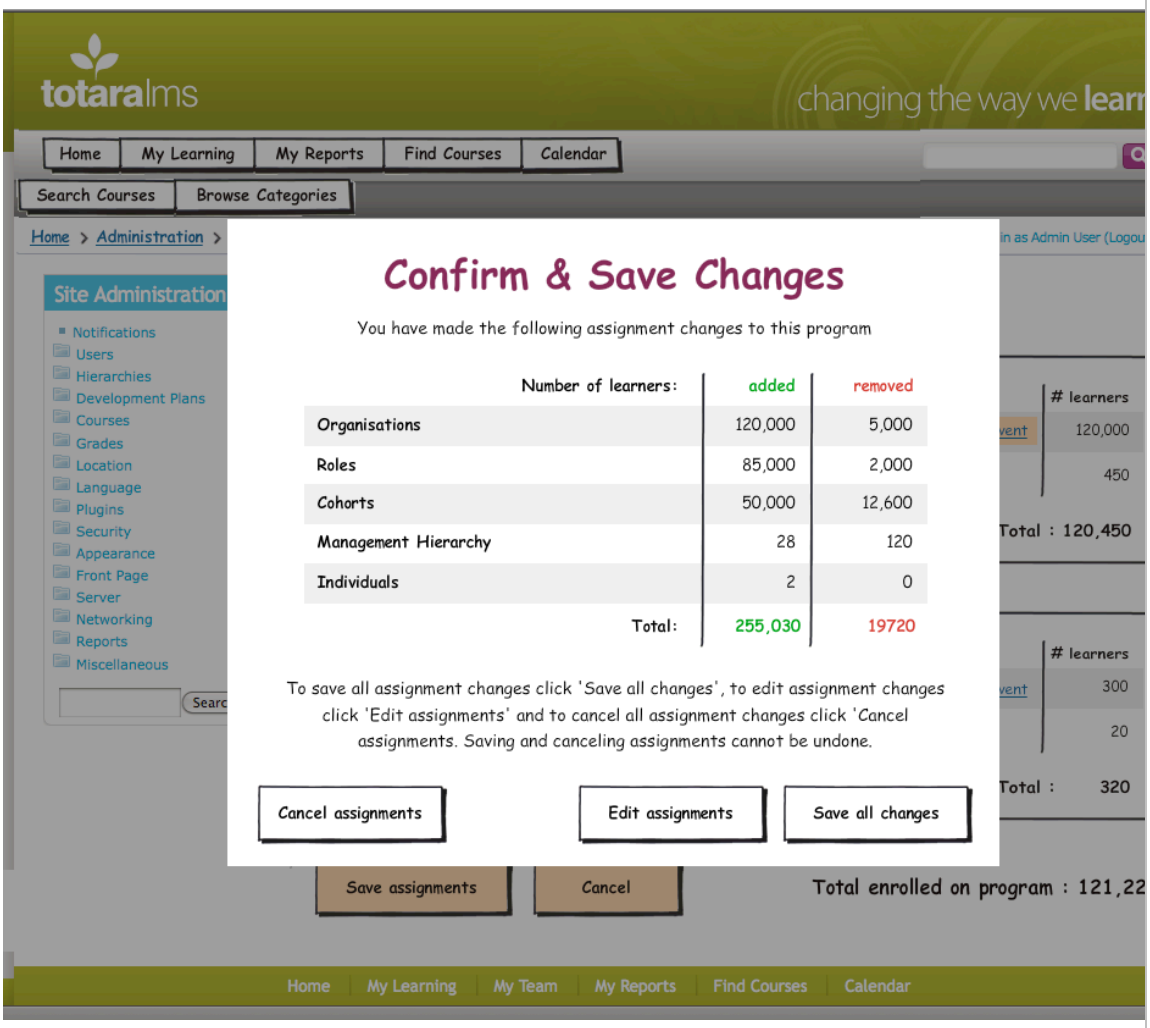
Screen reference: PM04-08.png

PM04-9: Confirm and save all changes to assignments

Lightbox interface used to confirm and save all changes to the assignments. Shown when 'Review and save all changes to assignments' button is clicked from PM04-01 Program assignments.

Screen gives an overview of all changes with the number of learners added and

removed from each assignment category of organisations, roles (positions), cohorts, management hierarchy and individuals. The intention is a final sense check of all assignment changes before they are actually saved.



Screen reference: PM04-09.png

Element	Comment
Cancel	Cancels all changes made within assignments and returns to PM0
Edit	Returns to PM04-01 to continue editing assignments
Save	Saves all changes. Can either link to the exception report PM07-0 to Program settings PM02

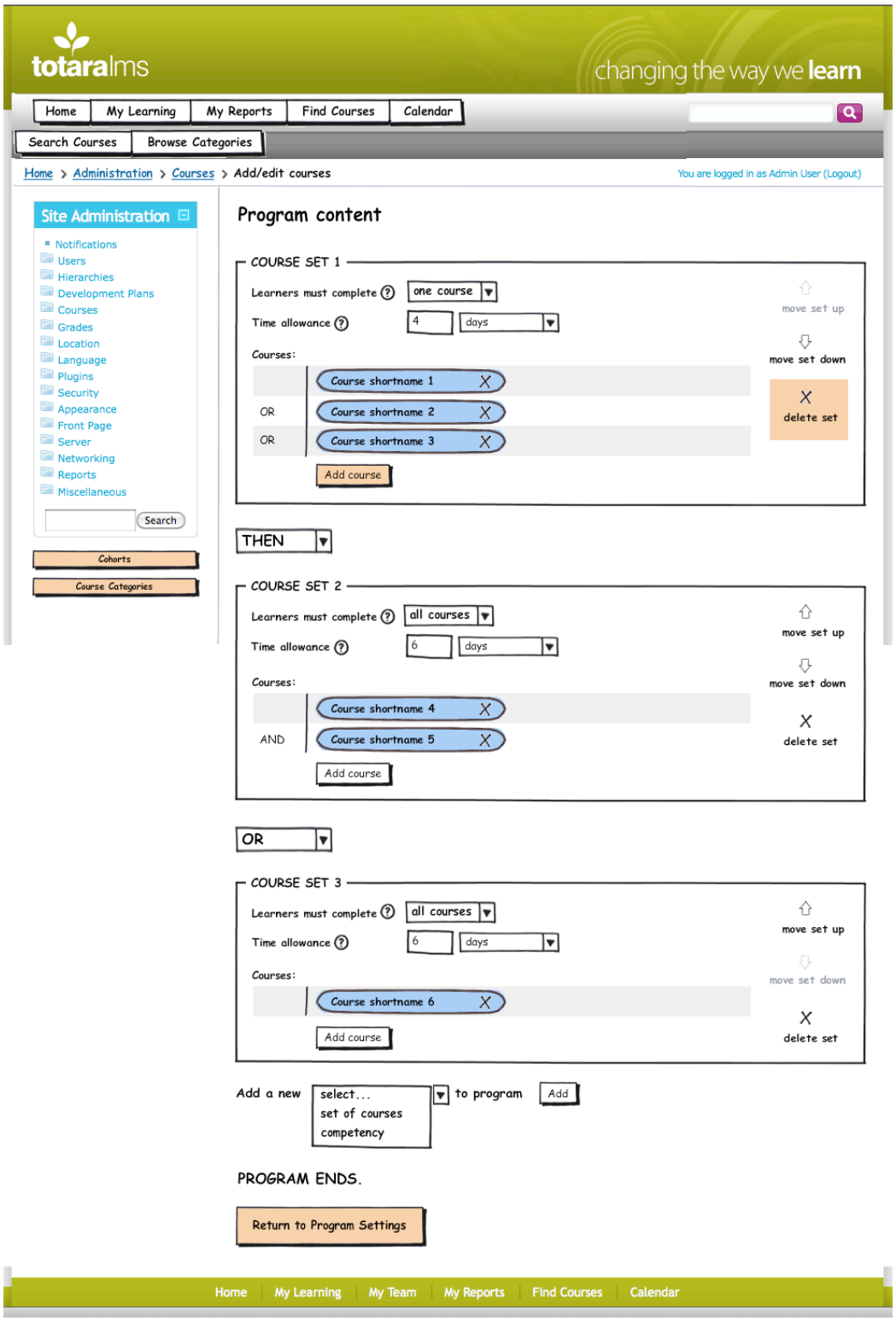
PM05-01: Messages and reminders for more details.

Save / cancel buttons	Saves changes (possibly with lightbox confirmation with continue and cancel options) are returns to PM02: Program settings

PM03-01: Program content

Used to build up the learning content (course sets) of the program and define the relationships between them. Sets can be created from manually adding courses or selecting a competency.
If a competency is used the structure of courses within the set becomes ridgid and cannot be changed. If the courses from the competency need to be edited within the set, the courses must be added individually to limit the complexity of this element of the program management component.

Set dividers are employed to fulfil two crucial roles. They allow the creation of sequences (i.e. dependencies) and they are used to overcome the issue of operator precedence.
See Use Cases 3.X for more details on program content.

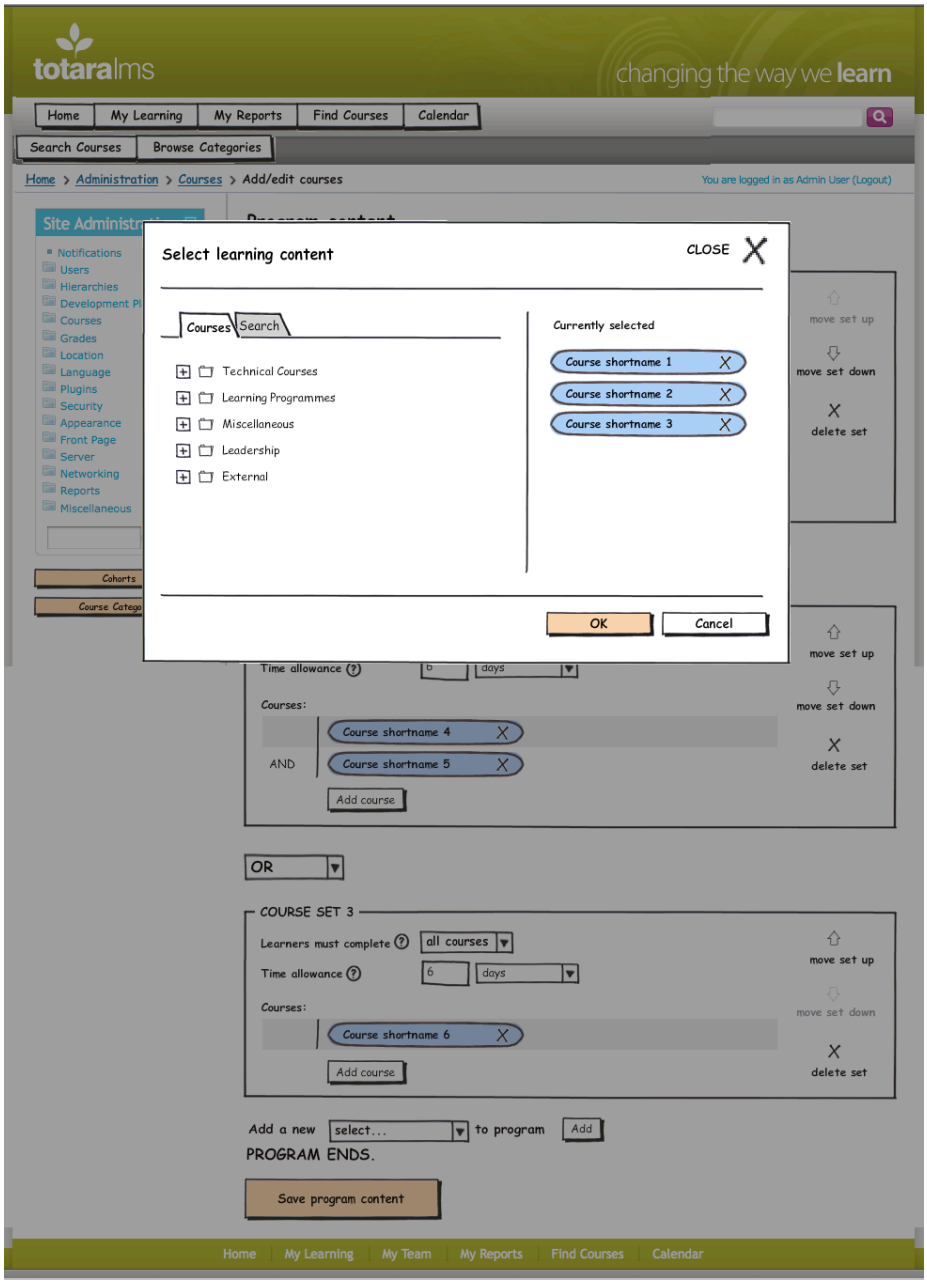


Screen reference: PM03-01.png

Element	Comment
Course set X	Contains all courses within the set and defines their relationships as AND or OR only. It is not possible to mix operators within a set (see next element for more details).
Learners must complete	The operator options within the set are 'one course', meaning OR or 'all courses', meaning AND. The idea is to keep the flow humanly readable. Depending on option chosen, the text in front of the courses changes automatically.
Time allowance	Sets the amount of time allowed to complete the courses within the set. This is general indication of elapsed time to complete the set, not the actual time it takes to complete a course.
Course shortname	Shows the courses that make up the set. Courses can be removed by clicking the X.
Add course	Launches lightbox interface to select courses from catalogue. See PM03-02: Add courses to set for more details.
Move set up	Disabled on Set 1. Moves the set up, thereby changing the order of the program. See Use Case 3.4 for more details on moving sets.
Move set down	Disabled on the last set. Moves the set down. See Use Case 3.4 for more details on moving sets
Delete set	Launches lightbox interface to confirm set deletion. See PM03-03: Confirm course set deletion and Use Case 3.5 for more details.
THEN / OR operator	The drop down options are 'THEN', 'OR'. THEN is used to enforce a sequence. In this case, this means that learners can only gain access to courses in set 2, once they satisfy the criteria of set 1. OR is used to offer a choice between two AND (complete all) sets. I.e. it allows the following logic to be applied: (A and B) OR (C and D) THEN E.
Add a new	Allows new sets to be created from either a set of courses or a competency. Creating a set from a competency enforces the competency to stay complete / non-editable. See PM03-04: Select competency and Use Case 3.2 for more details.
Save / cancel buttons	Returns you to PM02: Program settings Note: this button may be changing to 'Save Program Content' and the system action to save changes would be performed at this stage and a confirmation lightbox with details of changes and numbers affected would be shown.

PM03-02: Add courses to set

Simple lightbox interface used to select courses from the catalogue to manually create a set. Shown when 'Add course' button is clicked within a set.



Screen reference: PM03-02.png

Element	Comment
Courses tab	Shows the catalogue of courses within the system, arranged into expandable folders. Open the folder and click on the course to select.
Search tab	Ability to search for a specific course.
Currently selected	Shows all the courses currently selected. No need to order courses logically - and / or operators make no difference in terms of order. Clicking X removes course from selection.
OK button	Saves the course selection and returns to PM03-01: Program content.
Cancel button	Returns to PM03-01: Program content without saving.

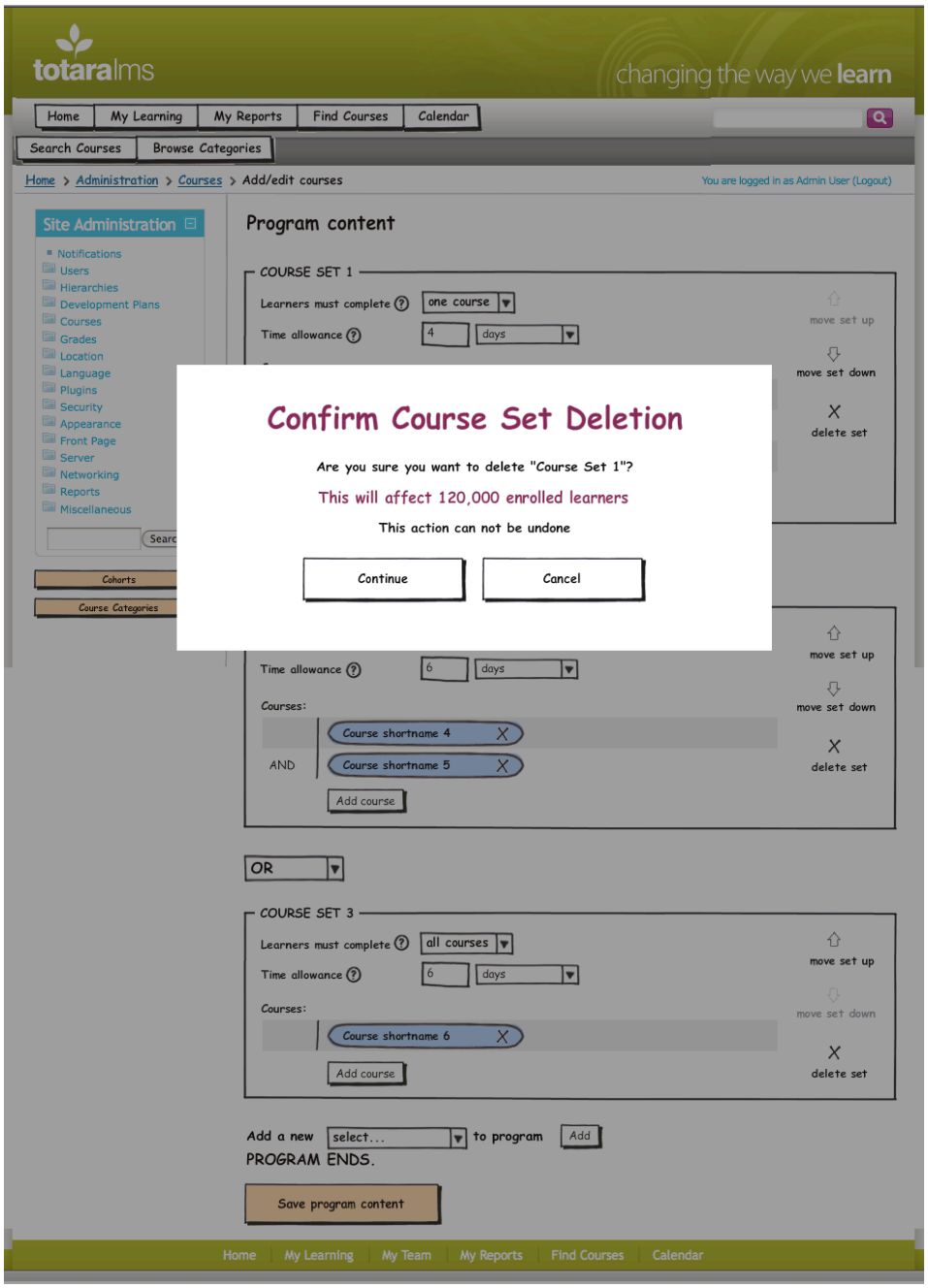
PM03-03: Confirm course set deletion

Confirmation lightbox shown when clicking 'delete set' from PM03-01. Important (when editing an existing program) to show the number of Learners affected.

At this point it is thought that the changes are not saved within the system until Save Program Content button (previous labelled Return to Program Settings) is click at the bottom of the Program Content screen.

If the changes are not saved at this point then the language within the confirmation lightbox will need to be adjusted.

For further information on deleting sets see Use Case 3.5.

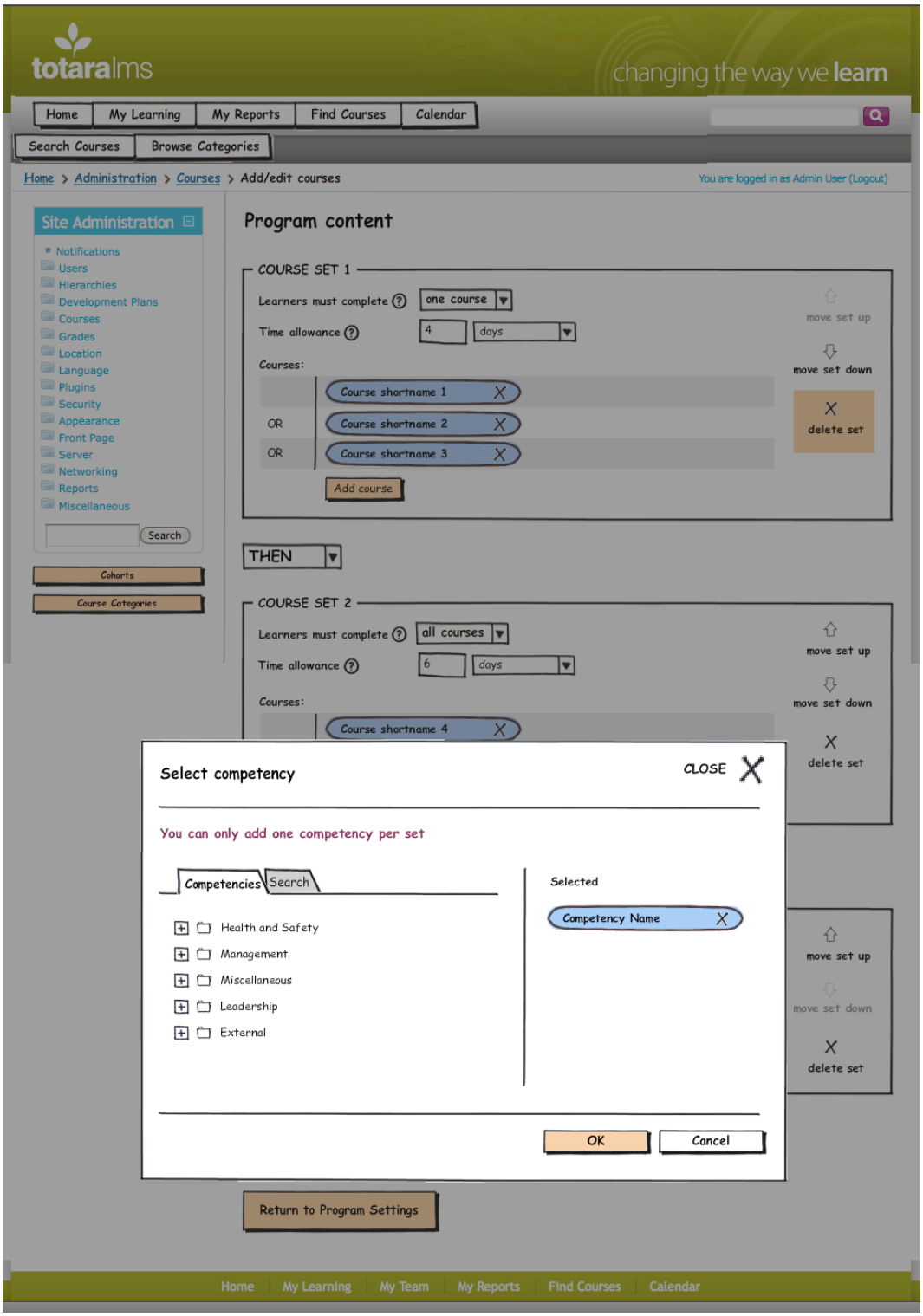


Screen reference: PM03-03.png

Element	Comment
Continue	Saves changes and returns to PM03-01: Program content
Cancel	Changes not saved and returns to PM03-01: Program content

PM03-04: Select competency

Lightbox interface used to select competency to create a set. Shown when 'Add a new competency to program' is selected in the dropdown and the 'Add' button is clicked. Only one competency can be added per set and the courses cannot be edited. See Use Case 3.2 for details.

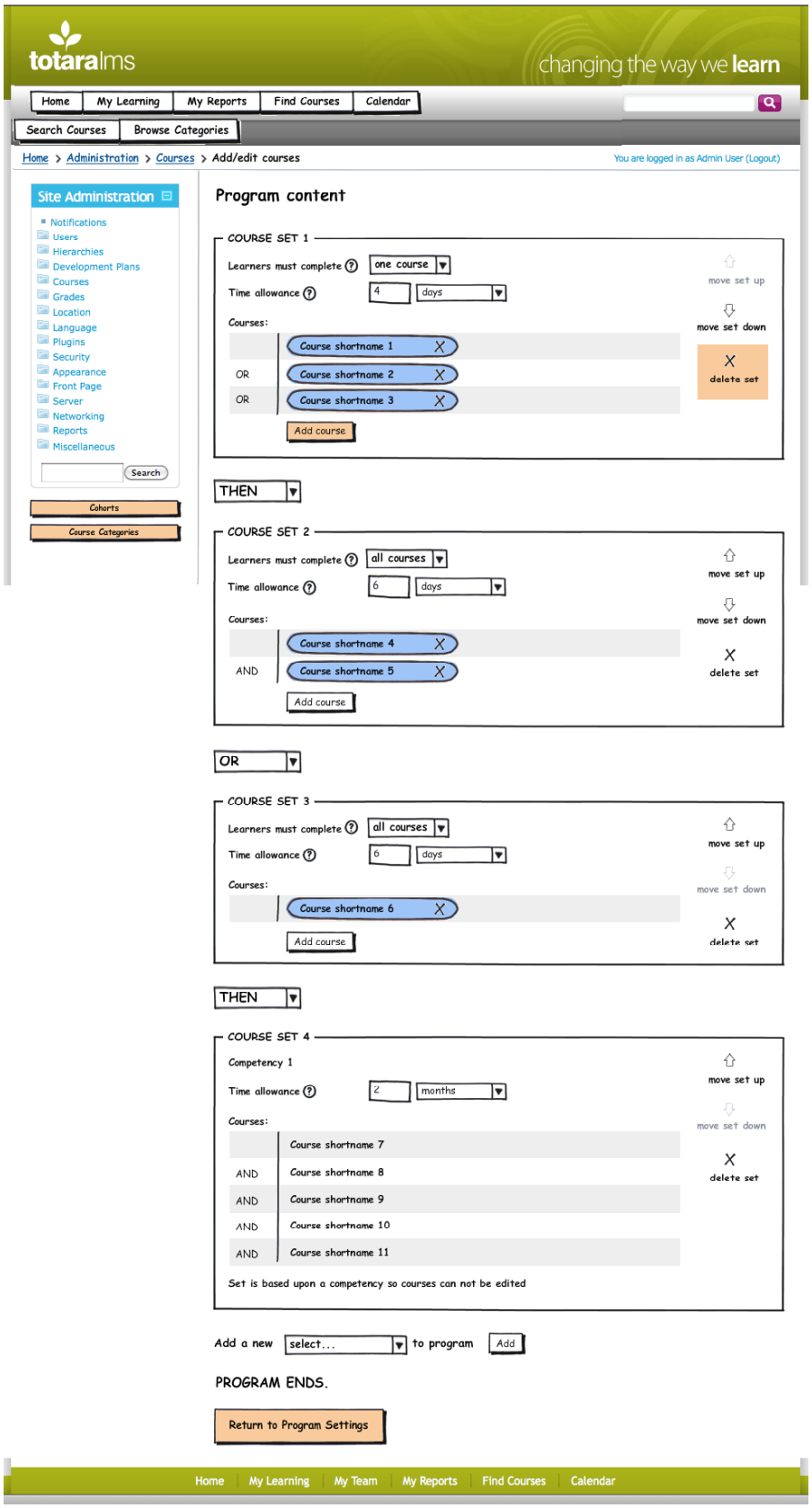


Screen reference: PM03-04.png

PM03-05: Program content with competency

Additional view of PM03-01 showing a competency added (set 4). Note the change within the set box. (*Screen shown on next page*)

Element	**Comment**
Competency 1	This is the name of the competency that was chosen to create the set.
Time allowance	Sets the amount of elapsed time allowed to complete the courses within the set. This is not the actual learning time but a realistic time during which learners can be expected to complete the set.
Courses	Courses cannot be edited. If the courses need to be modified a manual set must be created. The operator options within the set ('one course' or 'all courses') are determined by the competency settings.
Save / cancel buttons	Returns you to PM02: Program settings Note: this button may be changing to 'Save Program Content' and the system action to save changes would be performed at this stage and a confirmation lightbox with details of changes and numbers affected would be shown.



Screen reference: PM03-05.png

PM04-01: Program assignment

The enrolment screen provides the ability to assign programs to the categories of organisations, positions (roles), cohorts, management hierarchy and individuals. The actual system behaviour and process of assignment and enrolment will be detailed in the functional specification.

A general process within the assignment screens can be described as follows:

1. Make a change to a category assignment > Confirm the changes
2. Review and save all changes > Save, edit or cancel

The processes of changing category assignments e.g. assigning a new organisation (PM-04-02) or cohort (PM04-04) to the program are confirmed at each stage to sense check the number of affected learners. However the changes are not applied until a final review of all changes (PM04-09) is confirmed.

The only exception to the confirmation of changes is with individual assignments. As the number of individuals is relatively low in comparison, a lightbox confirmation would not be required.

For additional detail on Program assignment see Use Case 4.x

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Home | My Learning | My Reports | Find Courses | Calendar

Search Courses | Browse Categories

Home > Administration > Courses > Add/edit courses

You are logged in as Admin User (Logout)

Site Administration

- Notifications
- Users
- Hierarchies
- Development Plans
- Courses
- Grades
- Location
- Language
- Plugins
- Security
- Appearance
- Front Page
- Server
- Networking
- Reports
- Miscellaneous

Search

Cohorts

Course Categories

Program assignments

ORGANISATIONS

Organisation name	All below	Complete	# learners
Organisation 1 X	☑	Within X days of event	120,000
Organisation 2 X	☐	Set completion	450

Add organisation to program

Total : 120,450

ROLES

Role name	All below	Complete	# learners
Role 1 X	☑	Within X days of event	300
Role 2 X	☐	Set completion	20

Add role to program

Total : 320

COHORT

Cohort name	Source	Complete	# learners
Managers X	Created manually	Within X days of event	5
Engineers X	Created manually	Set completion	10

Add cohort to program

Total : 15

MANAGEMENT HIERARCHY

Manager name	For	Complete	# learners
John Wylie X	Direct team	Within X days of event	5
Kayleigh King X	All below	Set completion	10

Add manager to program

Total : 15

INDIVIDUALS

Individual name	User ID	Complete
Jason Smith X	12345	Within X days of event
Kenneth Dowes X	12346	Set completion
Matthew Annandale X	12347	Within X days of event
Michelle Ames X	12348	Set completion

Add individual to program

Total : 4

Review and save all changes to assignments

Total assigned on program : 121,225

Return to program settings without saving assignment changes

Home | My Learning | My Team | My Reports | Find Courses | Calendar

Screen reference: PM04-01.png

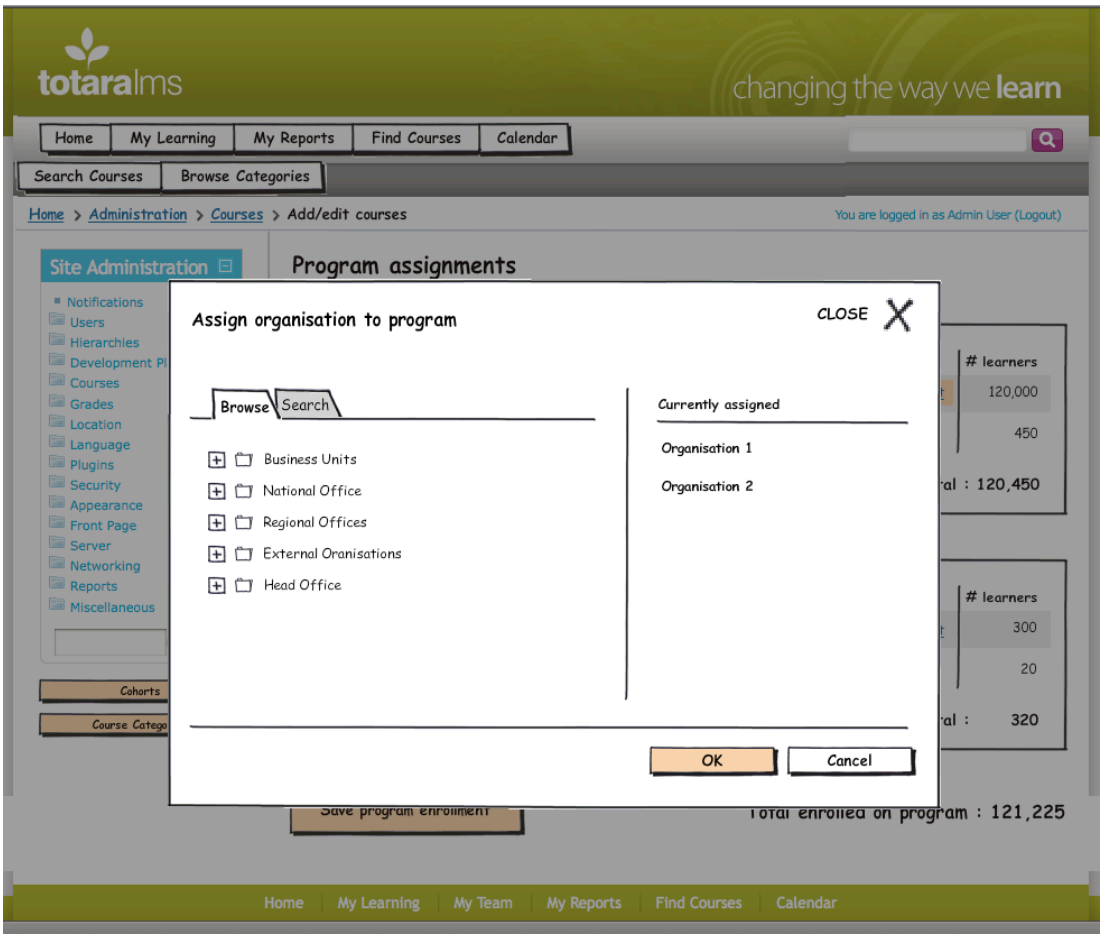
Element	Comment
General info	Whenever a change is made to the assignments that has an affect on many learners, a confirm lightbox must be shown. Confirmation performs a sense check as the changes can be profound. Within each group, the descriptions for 'all below', 'complete' and '#learners' are detailed as separate elements within this table.
Organisations	All information relating to organisation assignments. 'Add organisation to program' button links to PM04-02: Add organisation to program
Roles	All information relating to position / role assignments. 'Add role to program' button links to PM04-03: Add role to program
Cohorts	Cohorts will be incorporated from Moodle2. Current functionality allows individuals to be assigned to a cohort thereby creating a manual set. Additionally cohorts will require development to allow dynamic sets to be created based on specified criteria. 'Add cohort to program' button links to lightbox interface used to select cohort to add to assignment of a program. See PM06-01: Cohorts for more information.
Management Hierarchy	For the management hierarchy, the options 'direct team' and 'all below' exist. This is straightforward while users are only assigned to a single manager. When adding a manager to the program the default 'For' setting is 'Direct team'. If this is then changed to 'All below' a confirmation must be shown stating the number of affected learners. If 'All below' is then changed back to 'Direct team' again a confirmation is shown. The thinking is that we only want to show confirmation lightboxes when they are necessary and the number of learners affected could be considerable. 'Add manager to program' button links to PM04-05: Add manager to program
Individuals	Shows all individuals assigned to the program with individual 'complete by' criteria. 'Add individual to program' button links to PM04-08: Add individual to program

Title	Title of assigned organisation/role/cohort/manager/individual is shown with ability to remove from the program by clicking the X to the right of the name. Confirmation would need to be shown when removing assignment from organisation/role/cohort/manager. See PM04-06 for general details.
All below	'All below' means include children within a hierarchy. Need a consistent yet user-friendly way of phrasing. Also, there may be an issue with the name not being explicit enough in terms of where the organisation/role/cohort/manager sits in the hierarchy. Suggest providing the full path on rollover, e.g: Kineo Group -> Kineo Ltd (UK) -> Hosting & Support Team
Complete	'Complete' are the completion requirements. Options are a specified date for all or within a certain period of time following an event. Example events are: - registration in Totara - completion of something else - being assigned to a role or organisation See PM04-07: Set completion criteria for more details
#Learners	The number of learners is a sense check, as this may affect a significant number of users. Number of learners is shown for each enrolment or assignment with a total tally shown within each group. Additionally at the bottom of this screen is the Total number of enrolled or assigned learners from all 5 groups.
Review and save all changes button	None of the changes to assignments will be saved until this button is clicked and the save changes button within the lightbox confirmation has been clicked. See PM04-09 for details of confirmation screen
Return to program settings link	Link provides a means of returning to the program settings screen (PM02) without making any changes to the assignments. It is possible to return to program settings without saving from within the confirm and save lightbox (PM04-09).

PM04-02: Add organisation to program

Lightbox interface used to select organisation to add to the assignment of a program. Shown when 'Add organisation to program' button is clicked from PM04-01 Program enrolment.

Organisations can only be added within this lightbox. Removal of an organisation is only possible from PM04-01 Program assignment. The reason is due to the impact removal can have on thousands of learners and therefore requires the sense check, confirmation lightbox.



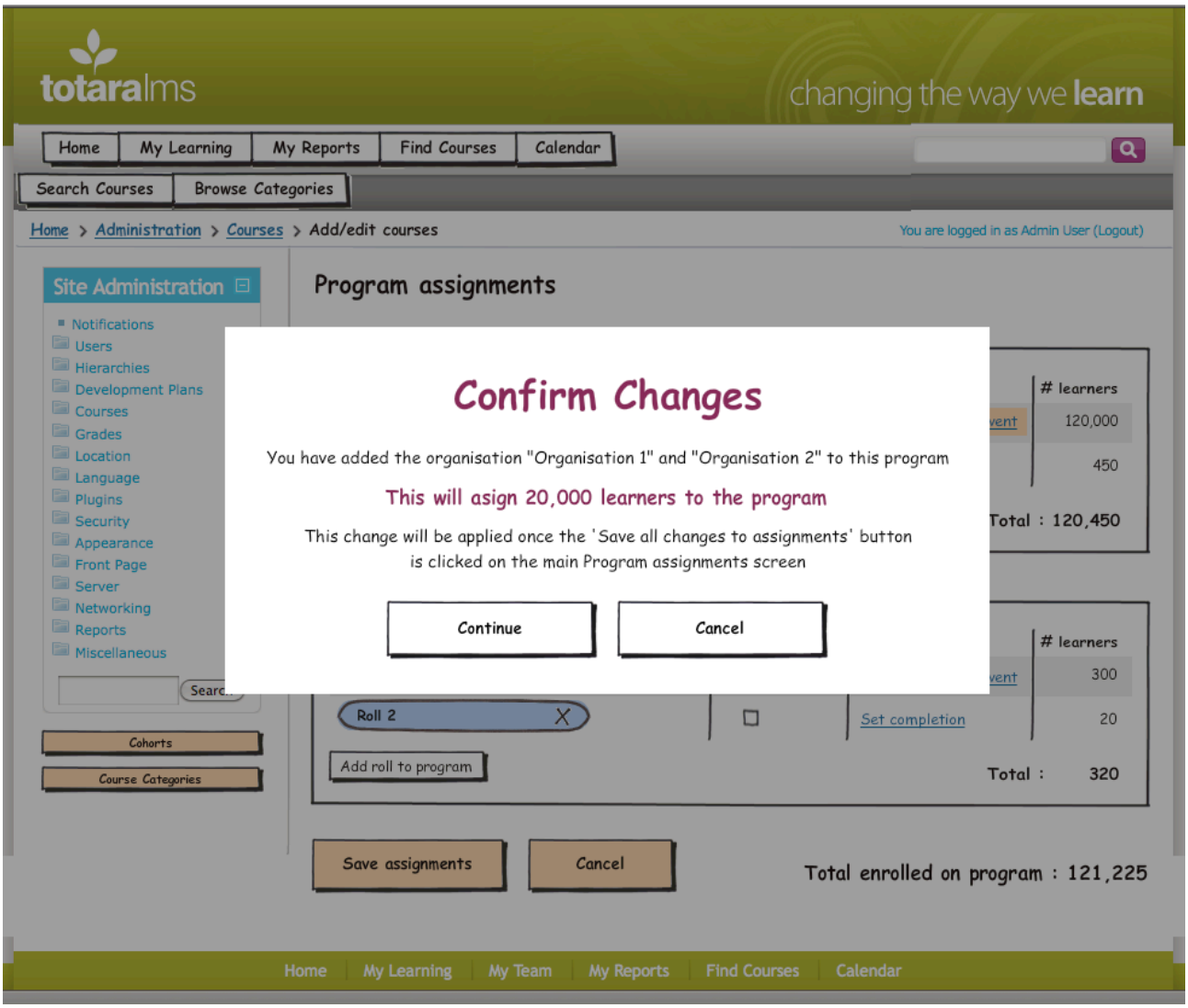
Screen reference: PM04-02.png

Element	Comment
Browse tab	Tree structure of organisations.
Search tab	Provide a basic organisation search interface (not detailed).
OK button	Links to PM04-02-01 confirm changes
Cancel	Changes not saved and returns to PM04-01

PM04-02-01: Confirmation

Once organisations have been added at PM04-02 and the OK button is clicked. Confirmation lightbox is shown with the relevant information.

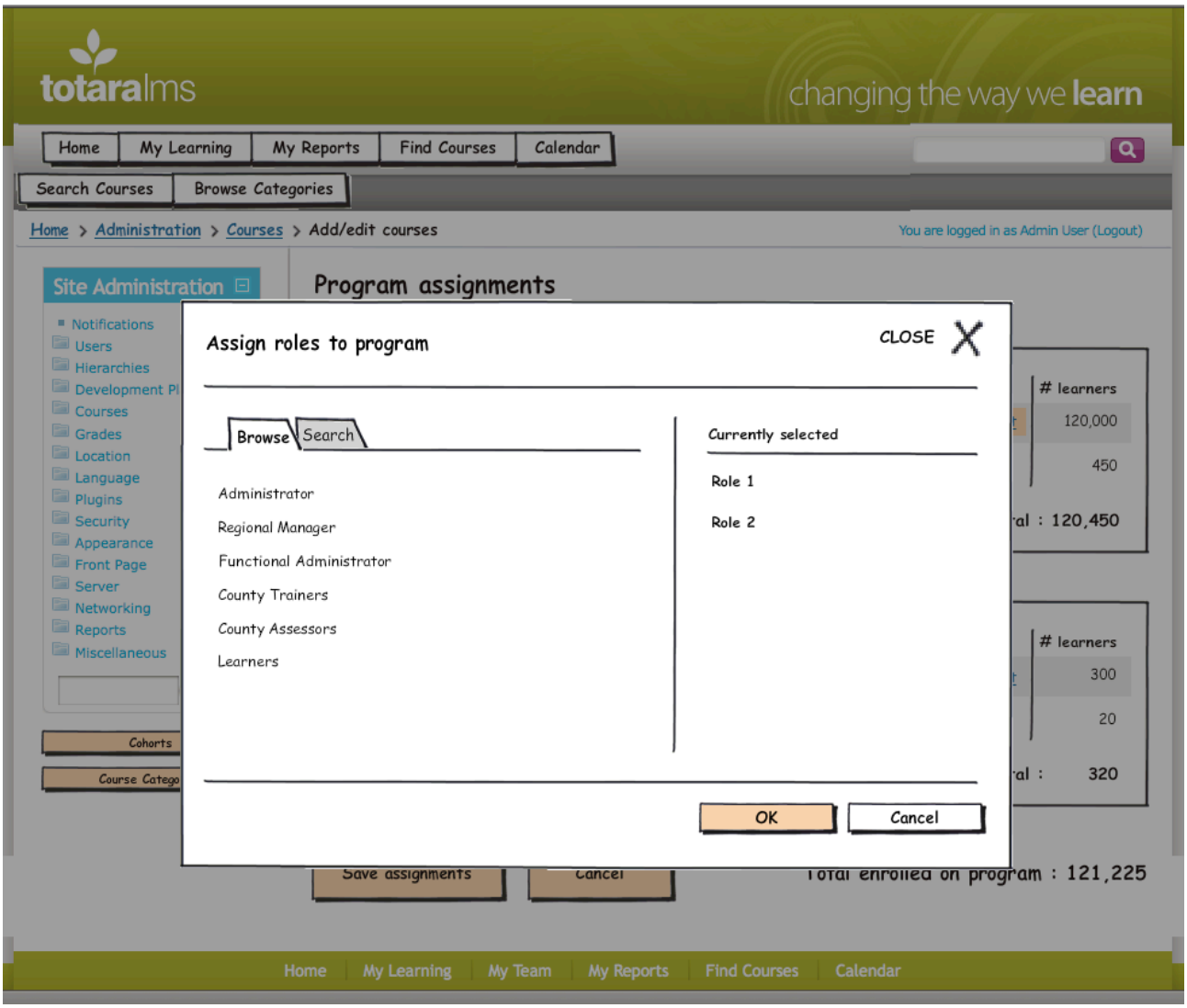
Lightbox is only intended to confirm the changes. Changes are applied once the 'Review and save all changes to assignments' button is clicked and then confirmed (See PM04-09 for details).



Screen reference: PM04-02-01.png

PM04-03: Add role to program

Terminology of role and position are interchangeable. Lightbox interface used to select role to add to the assignment of a program. Shown when 'Add role to program' button is clicked from PM04-01 Program assignment.



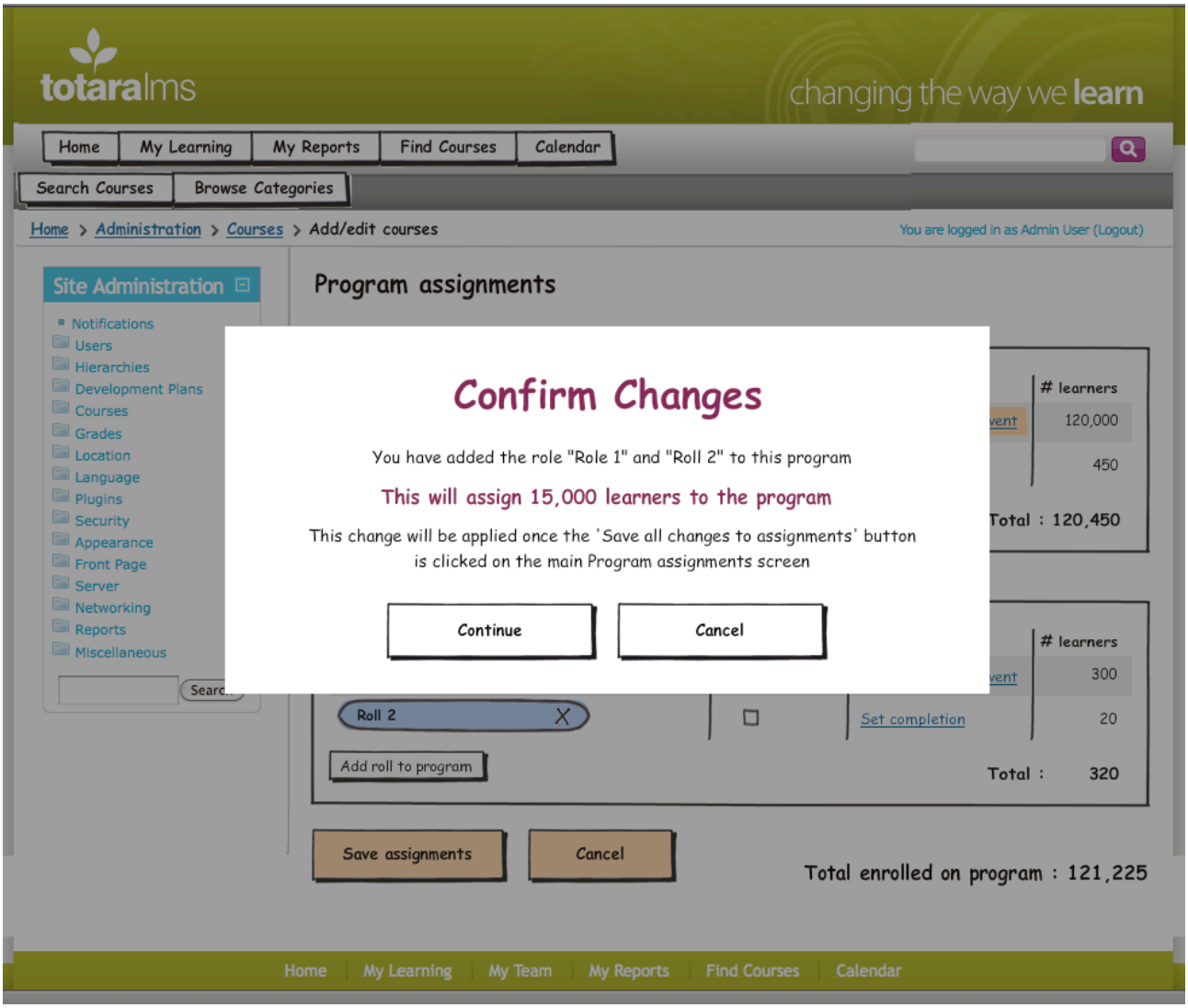
Screen reference: PM04-03.png

Element	Comment
Browse tab	View all roles within the system.
Search tab	Provide a basic role search interface (not detailed).
OK button	Links to PM04-03-01 confirm changes
Cancel	Changes not saved and returns to PM04-01 Program assignments

PM04-03-01: Confirmation

Once roles have been added at PM04-03 and the OK button is clicked. Confirmation lightbox is shown with the relevant information.

Lightbox is only intended to confirm the changes. Changes are applied once the 'Review and save all changes to assignments' button is clicked and then confirmed (See PM04-09 for details).

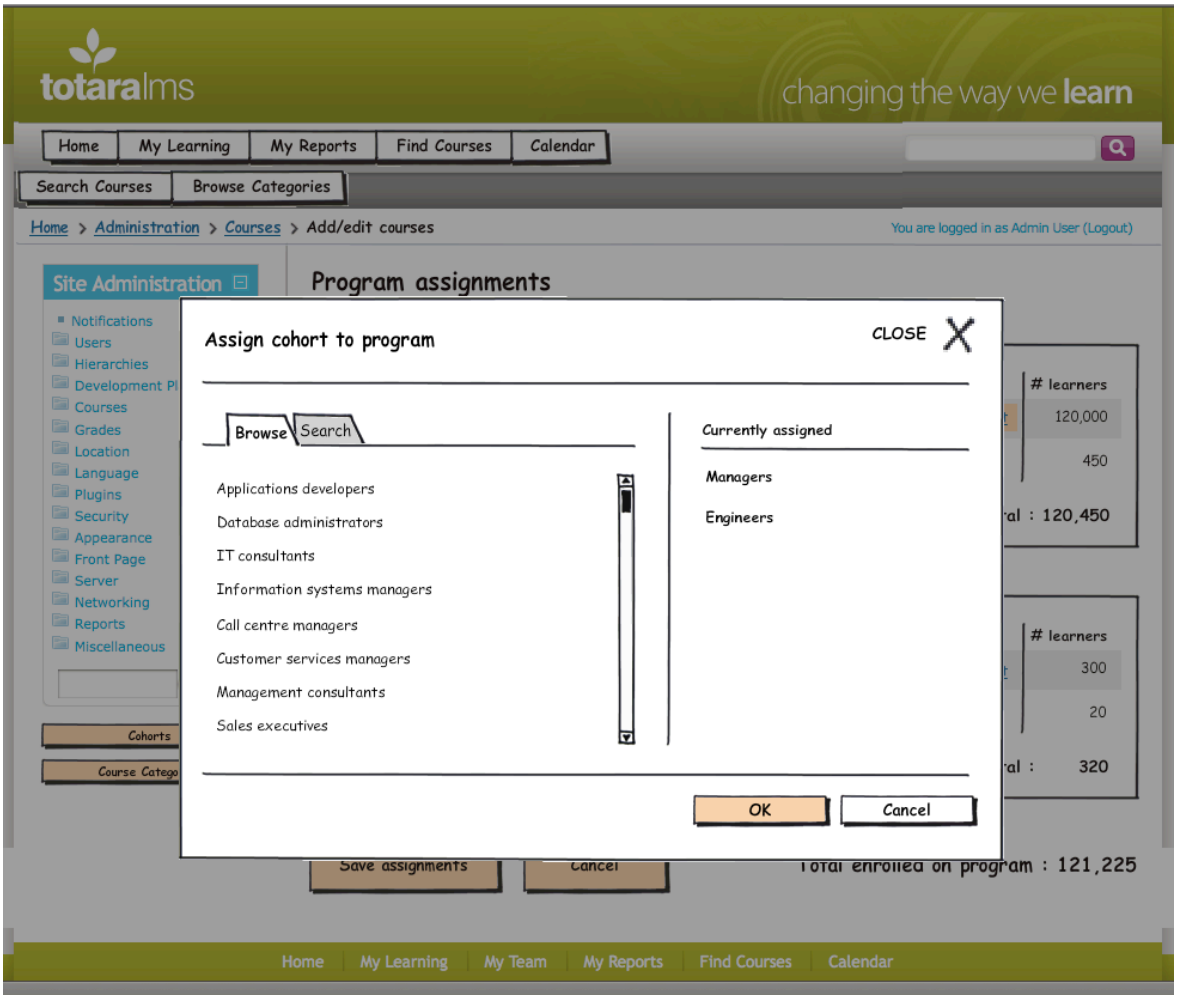


Screen reference: PM04-03-01.png

PM04-04: Add cohort to program

Lightbox interface used to select cohort to add to the assignment of a program. Shown when 'Add cohort to program' button is clicked from PM04-01: Program .

At this time it is unknown if any other details such as 'manually created' or 'dynamic' sets needs to be shown within this lightbox. Interface may benefit from separate tabs for the different sets.



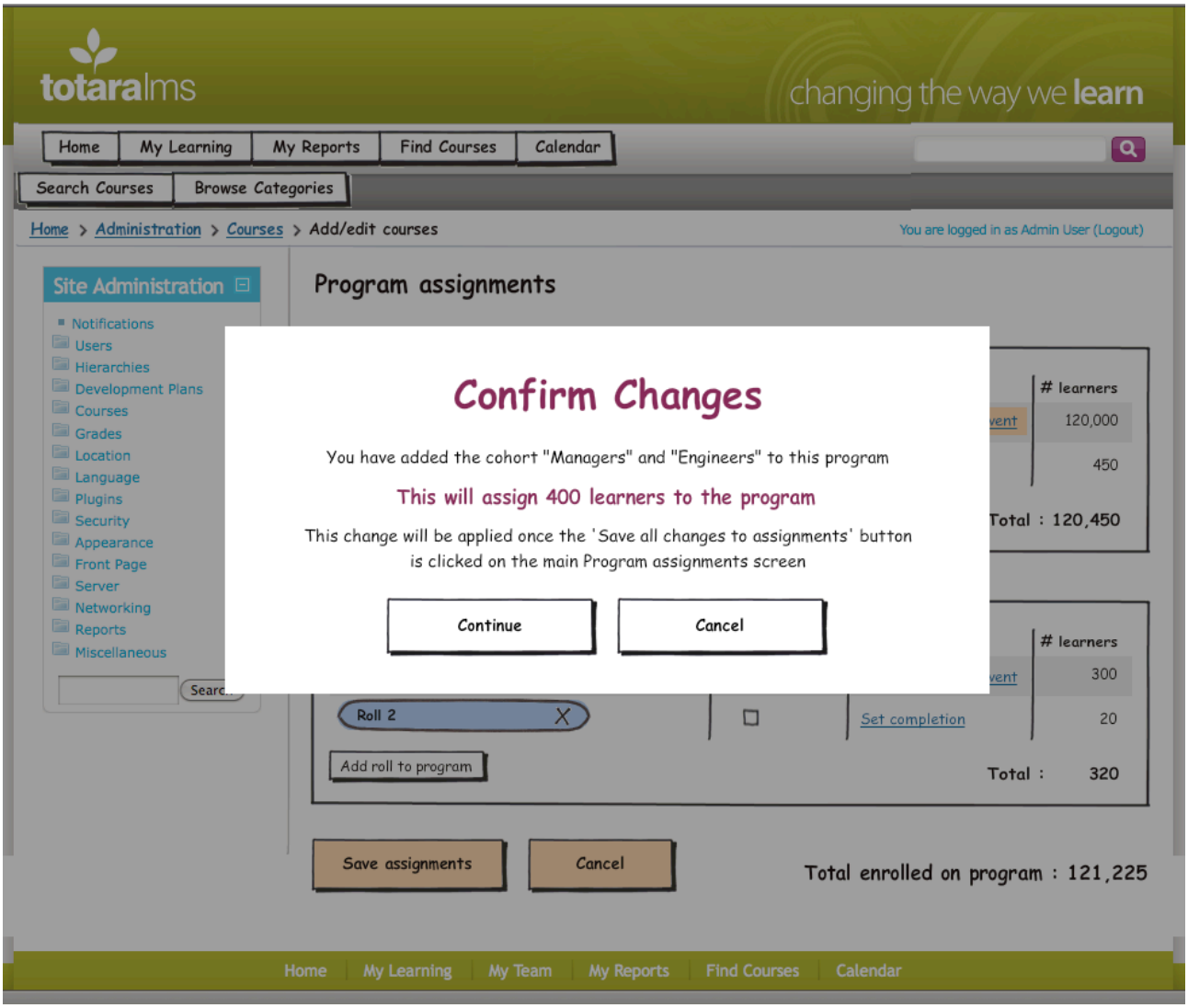
Screen reference: PM04-04.png

Element	Comment
Browse tab	View all cohorts within the system.
Search tab	Provide a basic cohort search interface (not detailed).
OK button	Links to PM04-04-01 confirm changes
Cancel	Changes not saved and returns to PM04-01: Program

PM04-04-01: Confirmation

Once cohorts have been added at PM04-04 and the OK button is clicked. Confirmation lightbox is shown with the relevant information.

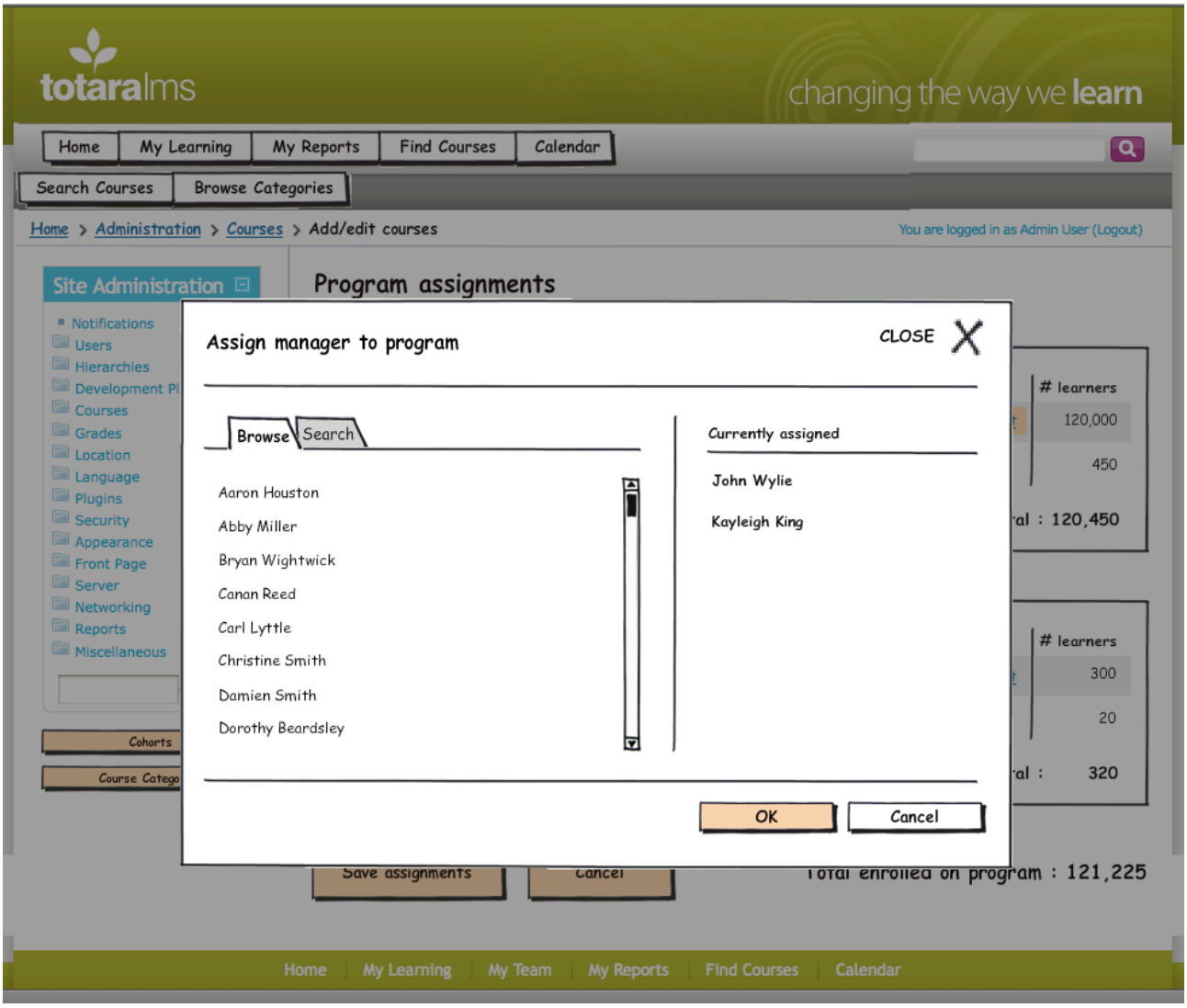
Lightbox is only intended to confirm the changes. Changes are applied once the 'Review and save all changes to assignments' button is clicked and then confirmed (See PM04-09 for details).



Screen reference: PM04-04-01.png

PM04-05: Add manager to program

Lightbox interface used to select manager to add to the assignment of a program. Shown when 'Add manager to program' button is clicked from PM04-01: Program .



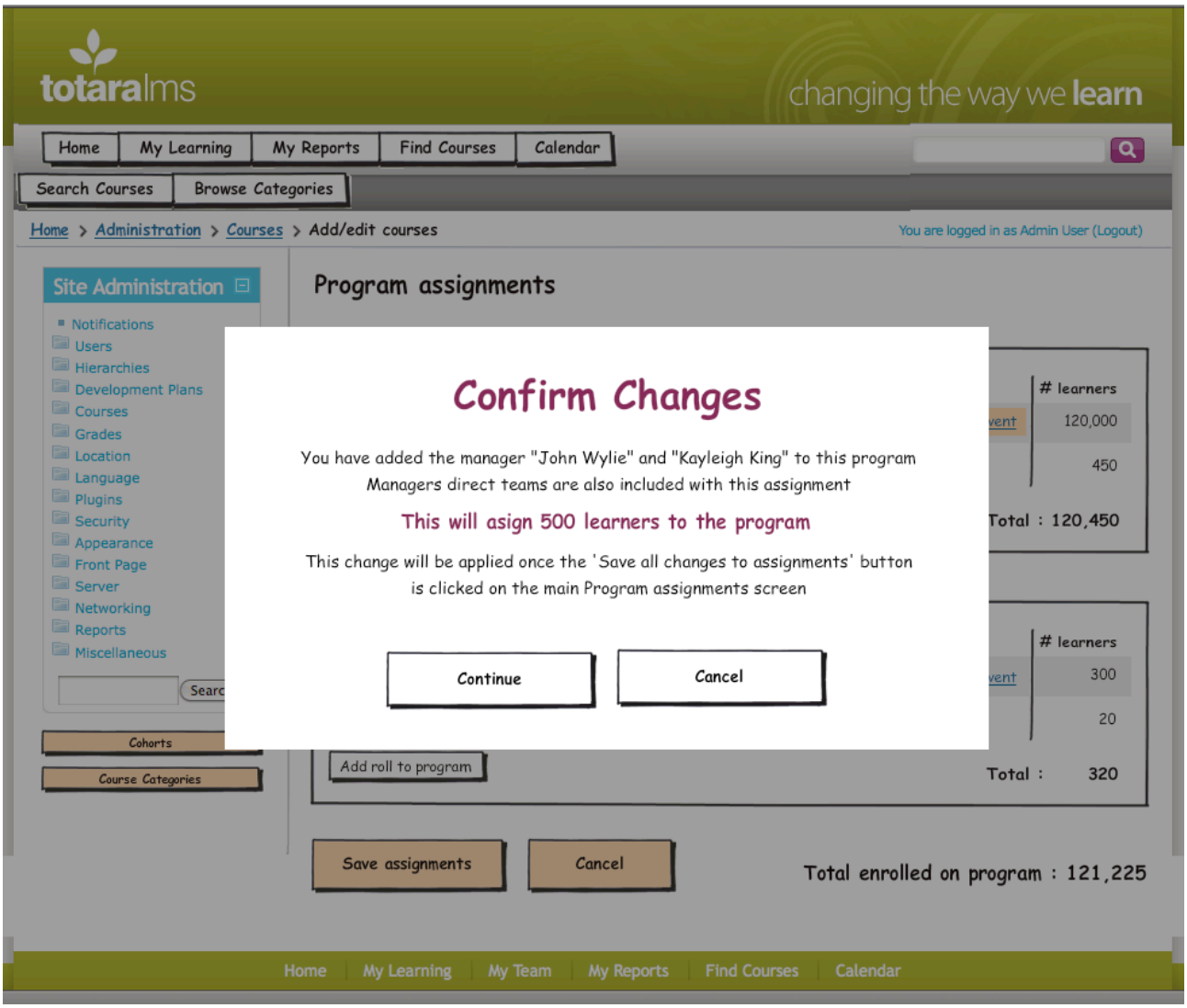
Screen reference: PM04-05.png

Element	Comment
Browse tab	Shows all managers within the system.
Search tab	Provide a basic manager search interface (not detailed).
OK button	Links to PM04-05-01 confirm changes
Cancel	Changes not saved and returns to PM04-01: Program

PM04-04-01: Confirmation

Once managers have been added at PM04-05 and the OK button is clicked. Confirmation lightbox is shown with the relevant information.

Lightbox is only intended to confirm the changes. Changes are applied once the 'Review and save all changes to assignments' button is clicked and then confirmed (See PM04-09 for details).

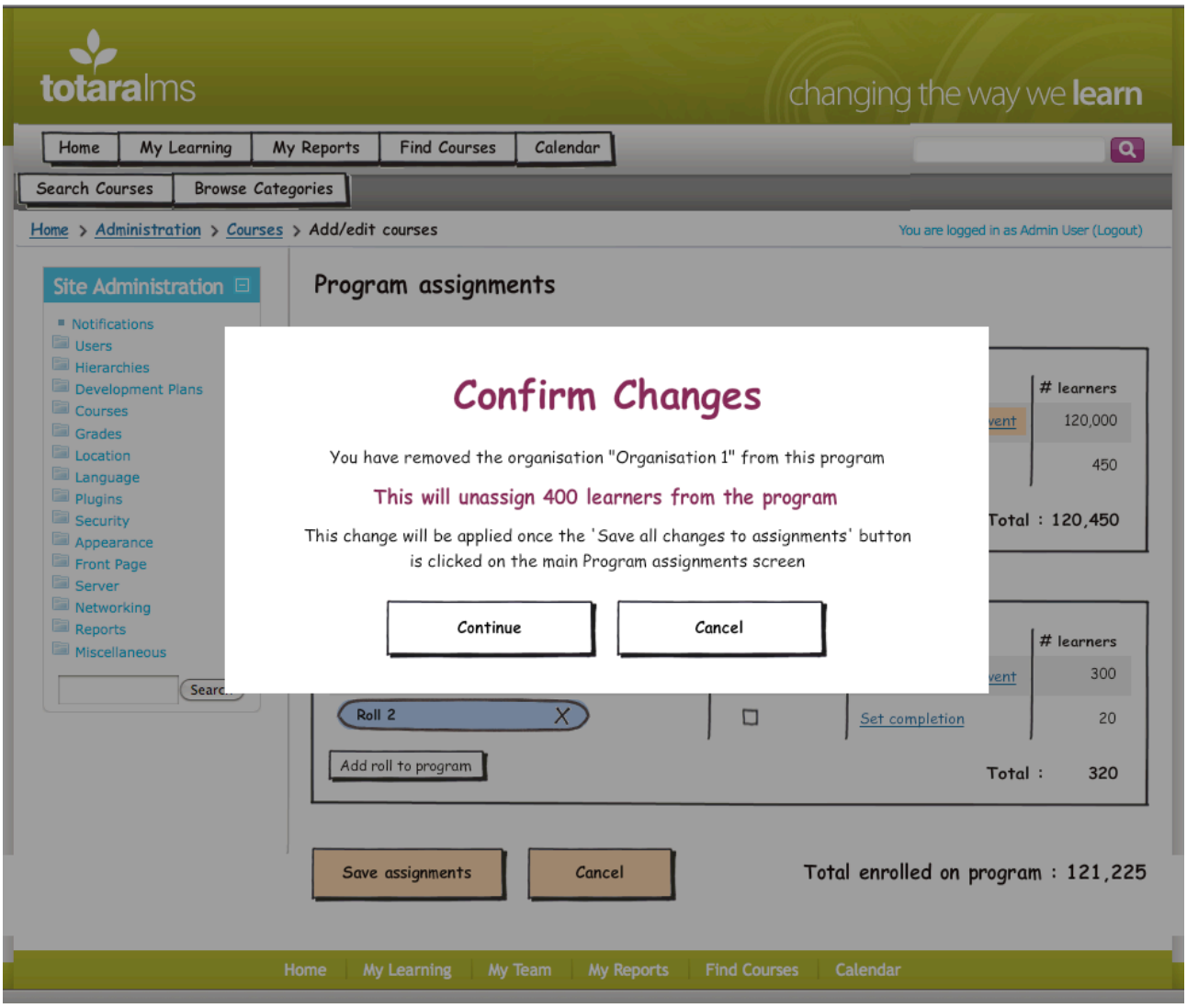


Screen reference: PM04-0501.png

PM04-06: Confirm assignment removal

Confirmation lightbox shown when removing an organisation/role/cohort/manager from a program. Provides the full information of what is being removed from with the total number of learners unassigned.

Lightbox is only intended to confirm the changes. Changes are applied once the 'Review and save all changes to assignments' button is clicked and then confirmed (See PM04-09 for details).

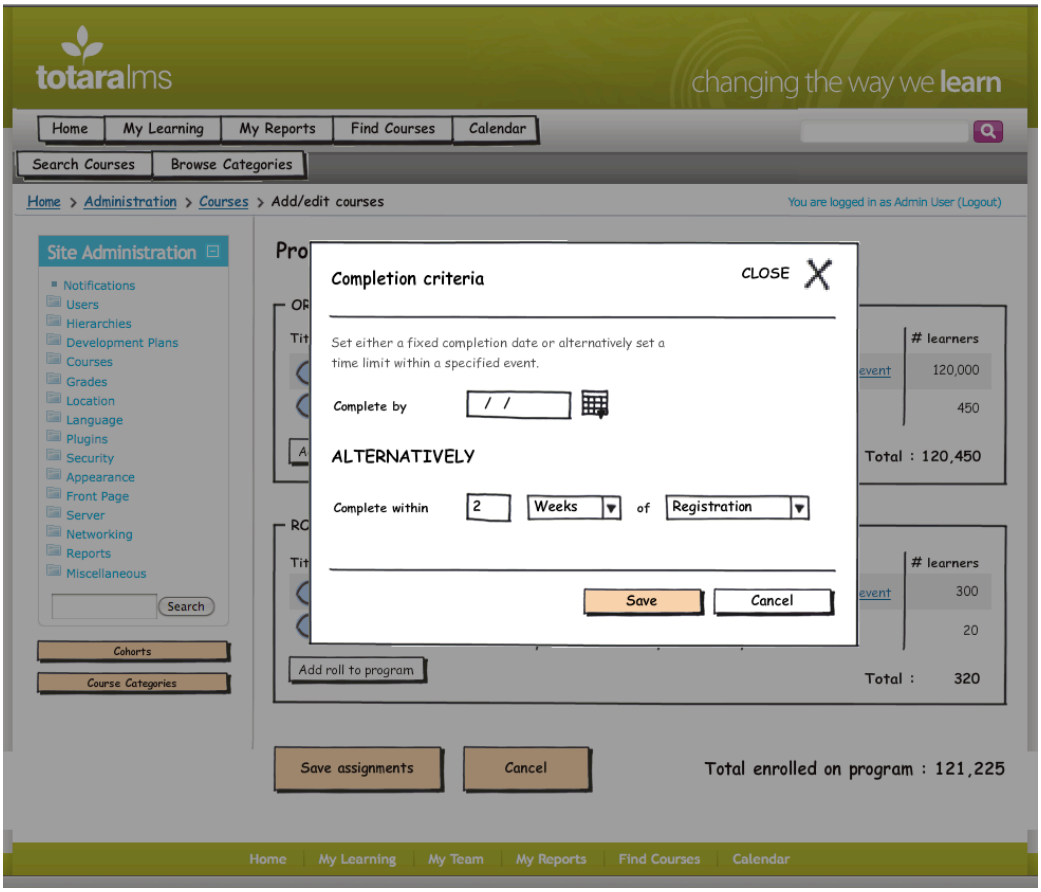


Screen reference: PM04-06.png

Element	Comment
Continue	Saves changes and returns to PM04-01: Program
Cancel	Changes not saved and returns to PM04-01: Program

PM04-07: Set completion criteria

Lightbox interface used to set the completion requirements for the organisations, roles, cohorts, managers and individuals. Can either set a fixed completion date or alternatively set a time limit within a specified event.



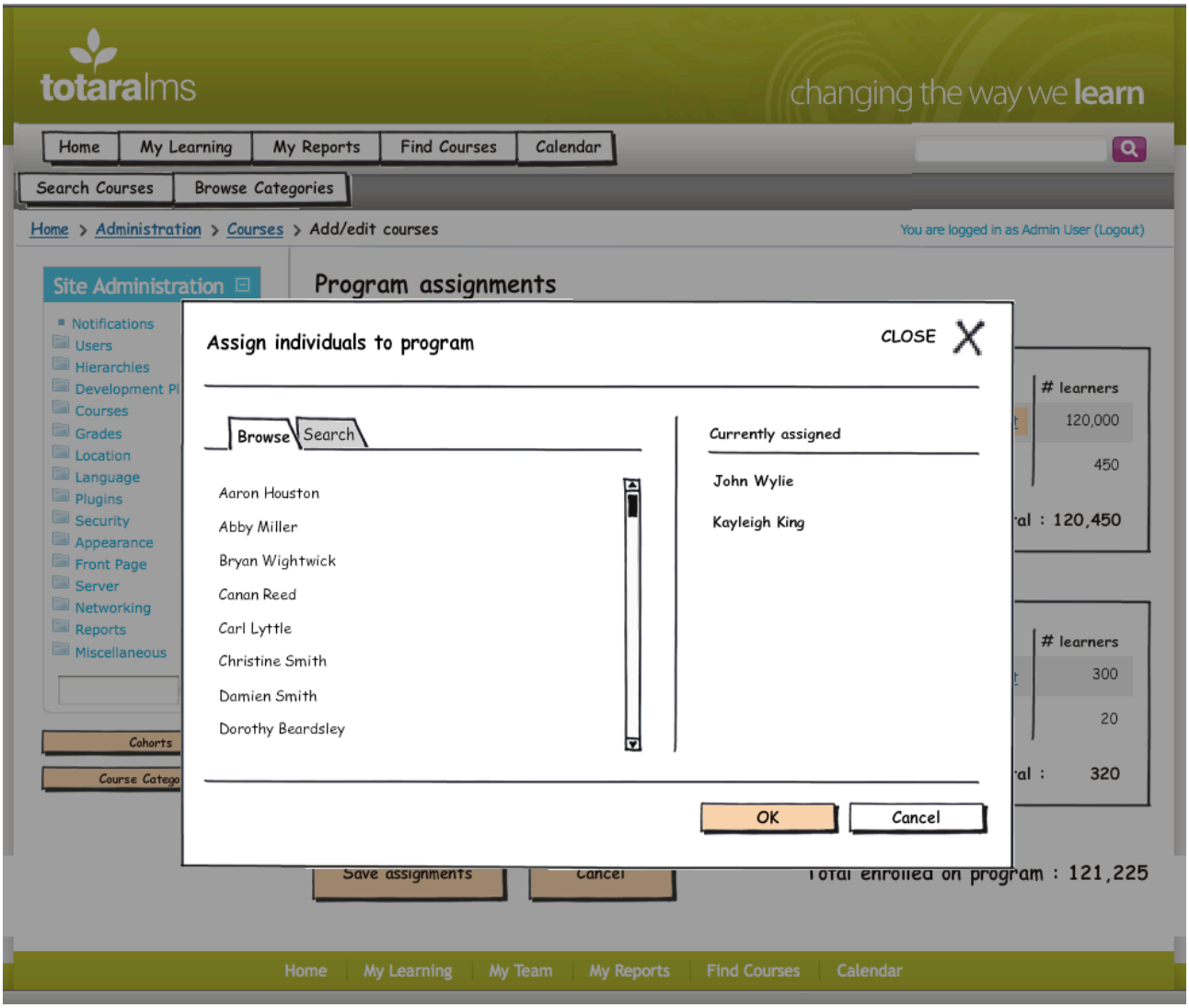
Screen reference: PM04-07.png

Element	Comment
Complete by	Standard date picker functionality to set a complete by date for the assigned group
Complete within	Allows a specified number of days/weeks/month/years to complete the program following an event. Example events could be: • Registration in Totara • Completion of something else • Being assigned to a role or organisation
Save	Saves changes and returns to PM04-01: Program
Cancel	Changes not saved and returns to PM04-01: Program

PM04-8: Add individual to program

Lightbox interface used to select individuals to add to the assignment of a program. Shown when 'Add individual to program' button is clicked from PM04-01 Program assignments.

As the number of individuals assigned to a program will be significantly less than assigning organisations, roles, mangers or cohorts; confirmation lightbox is not required and OK button returns to PM04-01 and updates the Individuals set.

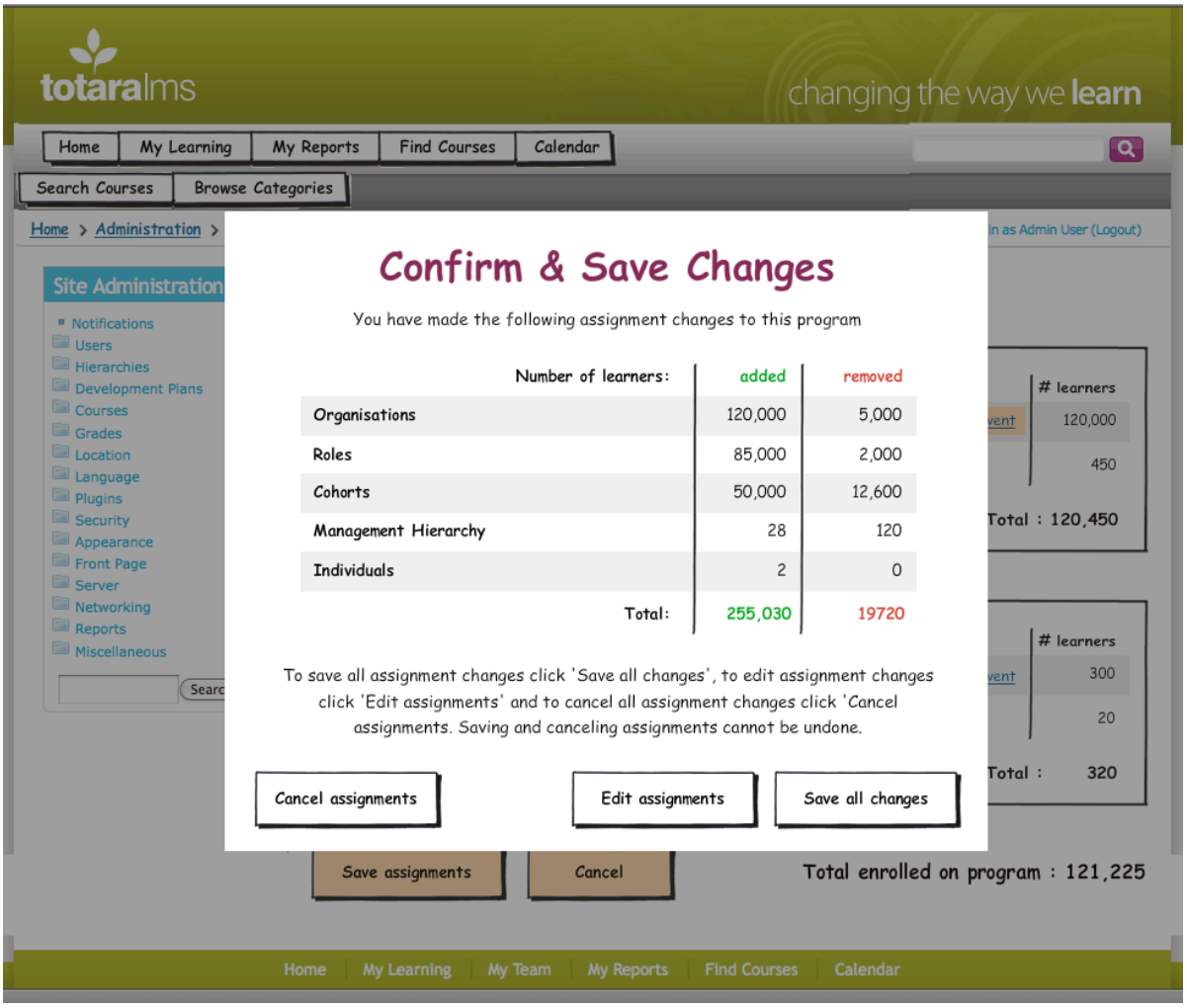


Screen reference: PM04-08.png

PM04-9: Confirm and save all changes to assignments

Lightbox interface used to confirm and save all changes to the assignments. Shown when 'Review and save all changes to assignments' button is clicked from PM04-01 Program assignments.

Screen gives an overview of all changes with the number of learners added and removed from each assignment category of organisations, roles (positions), cohorts, management hierarchy and individuals. The intention is a final sense check of all assignment changes before they are actually saved.

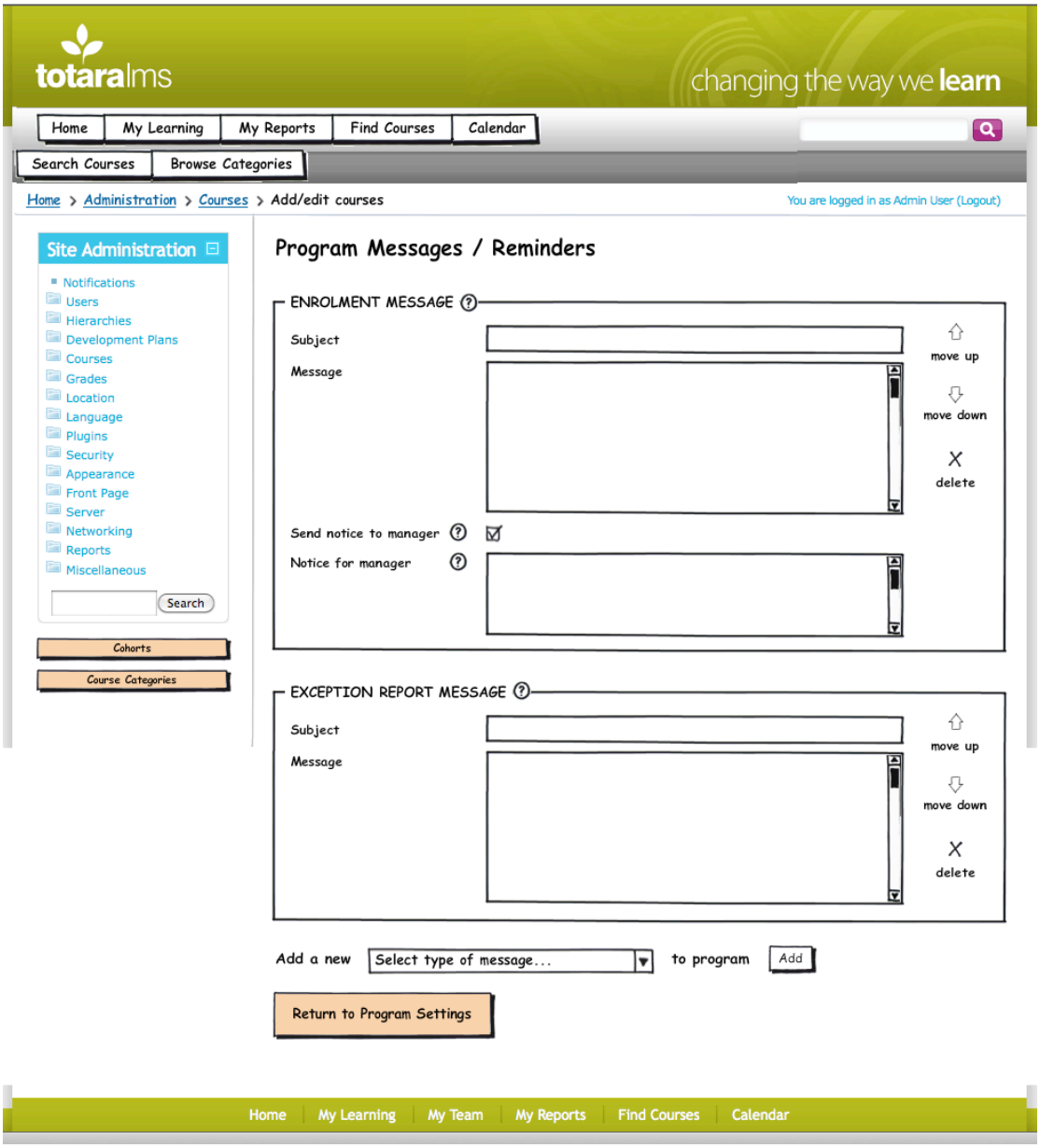


Screen reference: PM04-09.png

Element	Comment
Cancel	Cancels all changes made within assignments and returns to PM02
Edit	Returns to PM04-01 to continue editing assignments
Save	Saves all changes. Can either link to the exception report PM07-01 or back to Program settings PM02

PM05-01: Messages and reminders

Building upon the existing event messaging functionality, messages and reminders within programs provide the admin with an ability to create messages and reminders as required. By default there are two standard messages for every program; Assignment and Exception report. See Use Cases 5.x for further details.



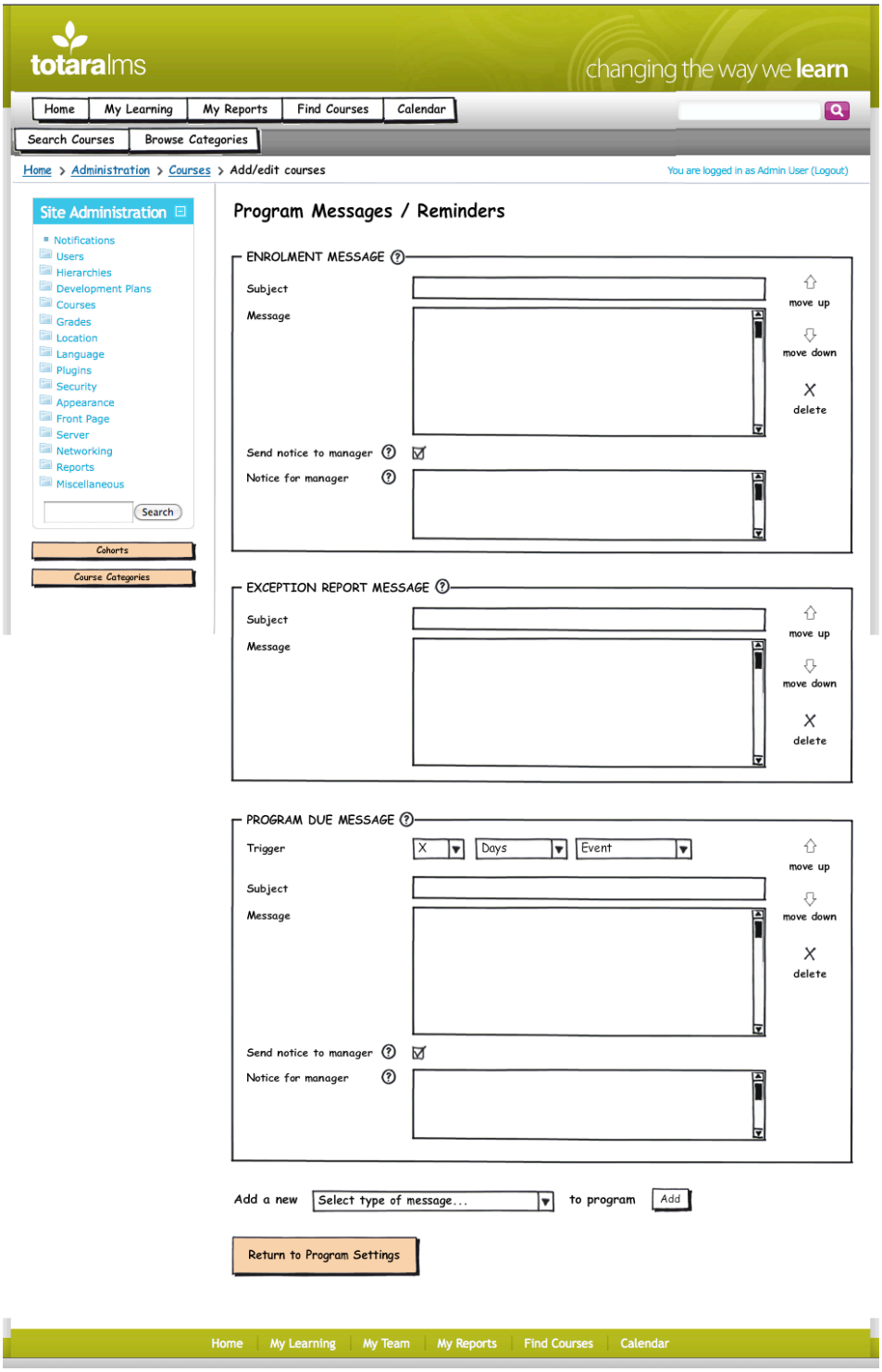
Screen reference: PM05-01.png

Element	Comment
Assignment message	Standard messaging functionality with Subject and Message fields, checkbox to Send notice to the learner's manager when enabled activates

	the Notice to manager field.
Move up / down	Ability to reorder messages as they appear on the screen, similar to the reordering functionality when defining program content, similar to the movement of course sets (see PM03-01: Program content) and defined in the Use Case 5.4. Reordering is not intended to effect message priority, it's designed to allow the admin to conceptually order the messages they create. Allowing them to sequence, for instance, time reminders logically.
Delete	Delete would not be shown for the standard messages of Assignment and Exception report. Confirmation lightbox would be shown to continue or cancel the deletion.
Exception Message	Standard message that is sent to the admin whenever new learners fall into the exception report (unknown if this should also be sent to the manager). The most likely cause would be new members of dynamic cohorts assigned to a program and time related issues.
Add a new	Additional messages that can be added to the program: • Program assigned • No longer part of required learning • Set due • Program due • Set due today • Program due today • Set overdue • Program overdue • Set completed • Program completed (well done!) • Follow up message to learner • New addition to exception report • New extension request Select the type of message from the dropdown and click Add Different 'types' of message have different options available. Time related messages like program due would allow the admin to specify a time period. Allowing the admin to create as many time reminders as required. See PM05-02: Program due message for more details

PM05-02: Program due message

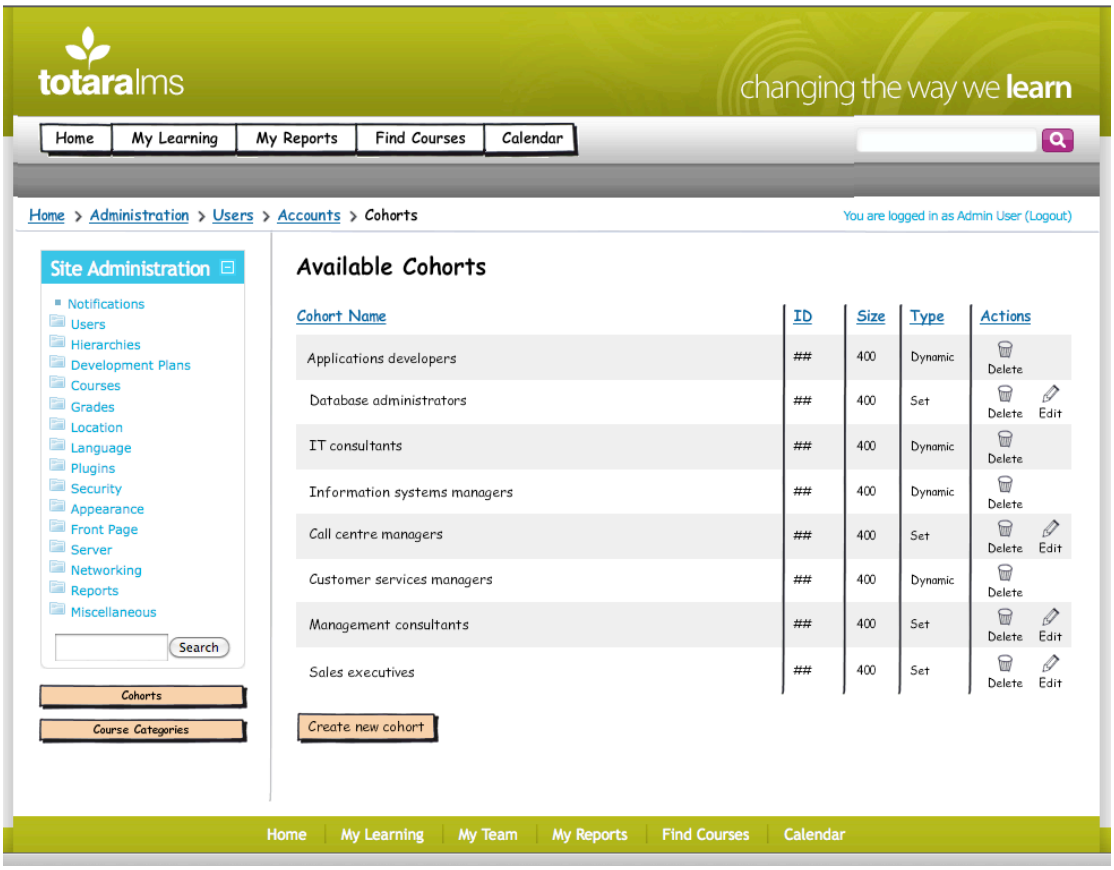
Screen illustrates an additional time related message being created by the admin with the ability to define a time period and event.



Screen reference: PM05-02.png

PM06-01: Cohorts

The cohort's component is part of Moodle2 and will back ported and extended to allow the creation of dynamic groups. Cohorts are created outside of the Program Management component but are used to assign programs to learners. Initial cohorts screen shows all available cohorts with related actions plus ability to create new.

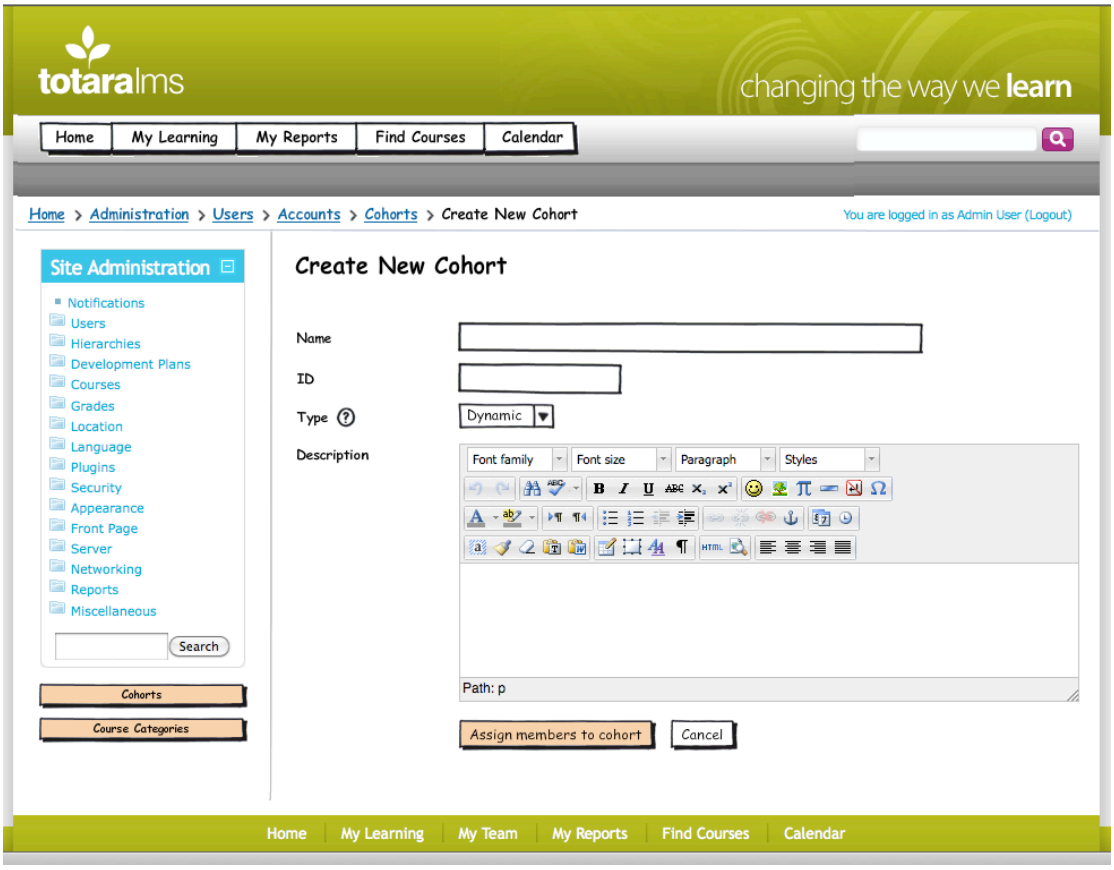


Screen reference: PM06-01.png

Element	Comment
Size	Column relates to the total number of cohort members
Type	Options are set (created manually) or dynamic.
Actions	Delete and edit (can only edit set NOT dynamic) Dynamic groups, once created, are no longer editable. This is to try and reduce the complexity of the program management component. If dynamic groups were edited the effects to assignments could be extensive and difficult to manage.
Create new group	Links to PM06-02: Create new cohort

PM06-02: Create new cohort

Cohort creation screen exists as part of Moodle2 component but requires the addition of a type selector to allow the creation of dynamic cohorts as well as the standard manually created cohorts.



Screen reference: PM06-02.png

Element	Comment
Type	Options are Set or Dynamic
Assign members to cohort button	If Set is chosen see PM06-05: Edit cohort set for details If Dynamic is chosen see PM06-03: Dynamic cohort creation for details
Cancel	Returns to PM06-01: Cohorts

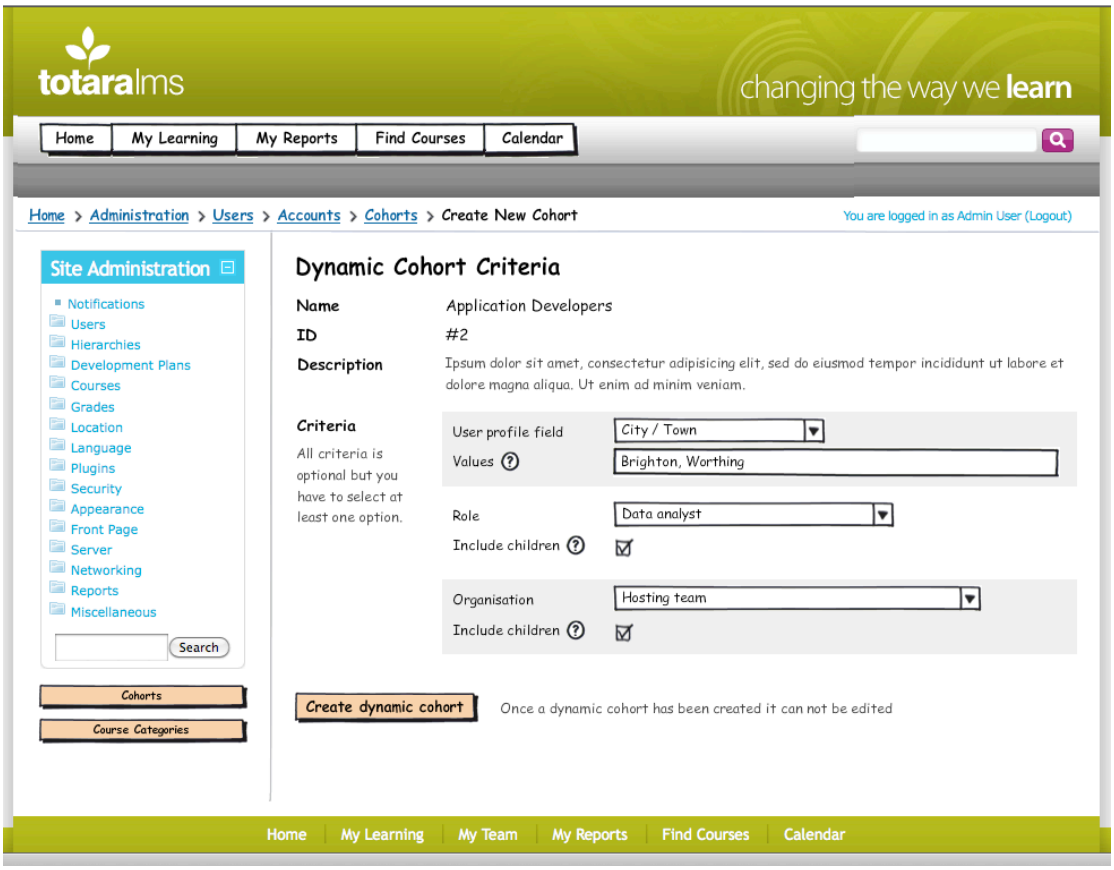
PM06-03: Dynamic cohort creation

Dynamic cohorts can only be created, they cannot be edited. Dynamic cohorts allow setting of up to three relatively simplistic criteria. This has deliberately been kept simple but should deliver significant flexibility despite the simplicity.

The criteria are:

- A single user profile field of choice (including extra profile fields), for which multiple values can be set via a CSV text field. (Need to work out how this works for checkboxes etc but wish to keep simple)
- A specific role (position) and optionally its full tree of children
- A specific organisation and optionally its full tree of children

All options are connected via AND logic, meaning everyone at 'Work level 3' (custom user profile field), who is an 'Account Manager' and works within 'Kineo Group Incorporated (US)', and all the way down the org tree (include children).

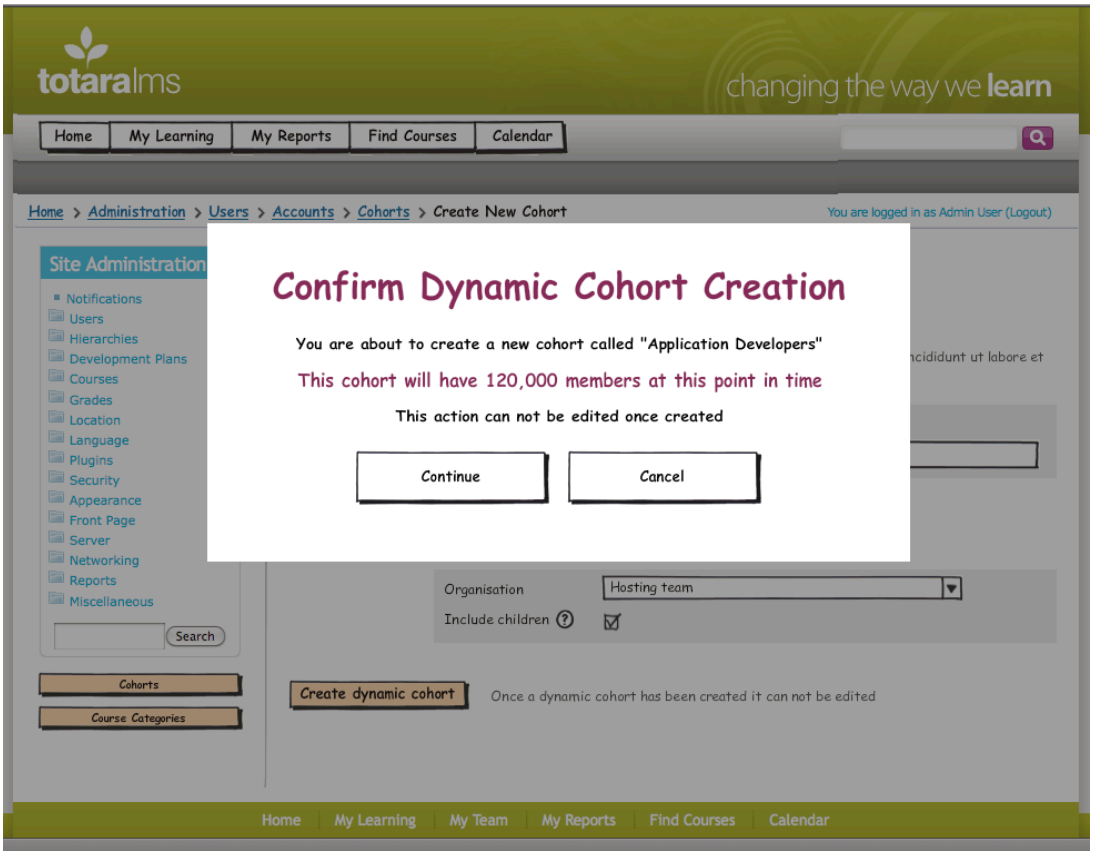


Screen reference: PM06-03.png

Element	Comment
Name, ID and Description	Values specified at PM06-02
Criteria	All criteria is optional but you have at least option has to be selected. The intention is to keep the criteria simple yet offer enough flexibility.
User profile field	Select from all user profile fields including custom fields.
Values	The required values from the user profile field. In this example (PM06-03.png) The profile field 'City / Town' is chosen and the required values within this field are 'Brighton' and 'Worthing'.
Role	Select from all roles present in the system
Include children	Checkbox to include all child roles to that selected
Organisation	Select from all organisations present in the system
Include children	Checkbox to include all child organisations to that selected
Create dynamic group button	Confirmation lightbox is show see PM06-04: Confirm dynamic cohort creation for more details

PM06-04: Confirm dynamic cohort creation

Confirmation lightbox screen shown as a sense check to the dynamic cohort being created, stating the total number of members at the point of creation.



Screen reference: PM06-04.png

PM06-05: Edit cohort set

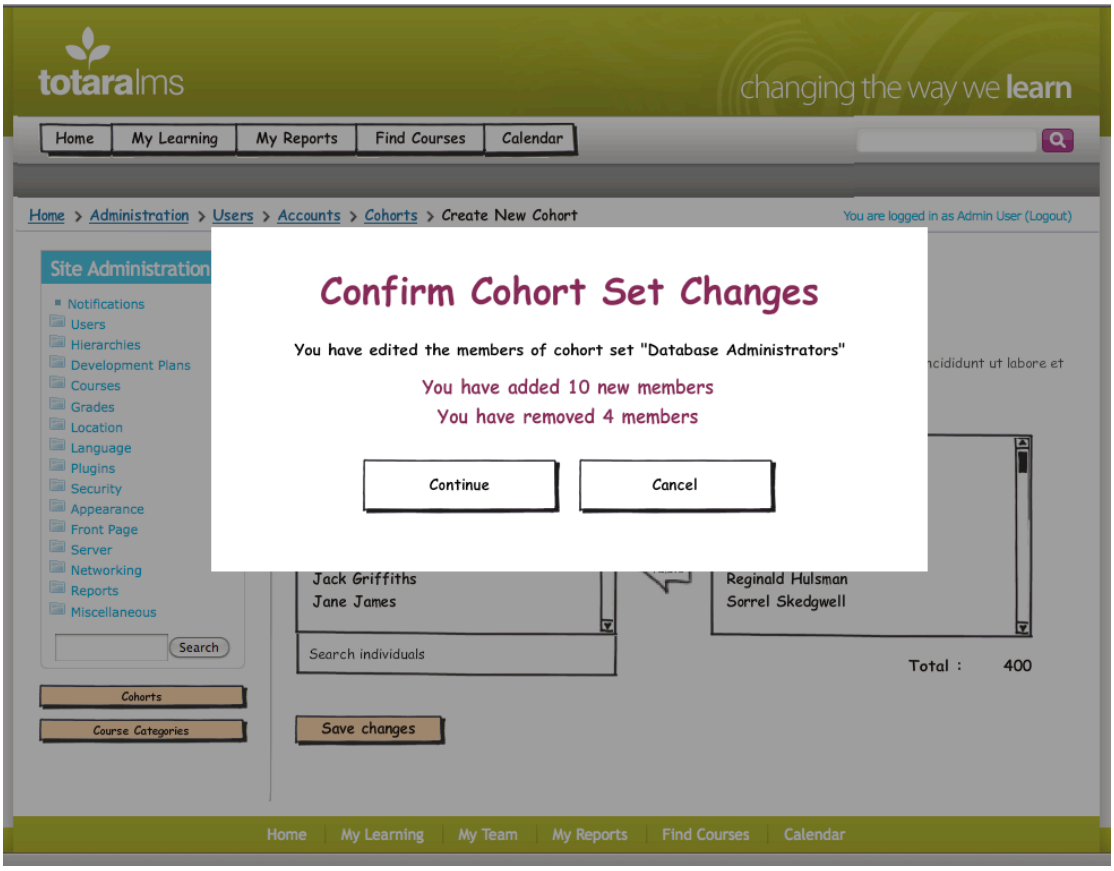
Screen shown when creating and editing a cohort set. Allows an individual to be assigned and removed from the cohort.

Screen reference: PM06-05.png

Element	Comment
Name, ID and Description	Values specified at PM06-02
Individuals	Shows all users present within the system with quick search facility. Allows multiple select of individuals
Selected individuals	Shows all users assigned to the cohort
Add / remove	Allows users to be added to or removed from the cohort
Save changes	Confirmation lightbox is shown See PM06-06 for details

PM06-06: Confirm cohort set

Confirmation lightbox screen shown as a sense check to the set cohort being created or edited. States the total number of new members added and/or the number of members removed.



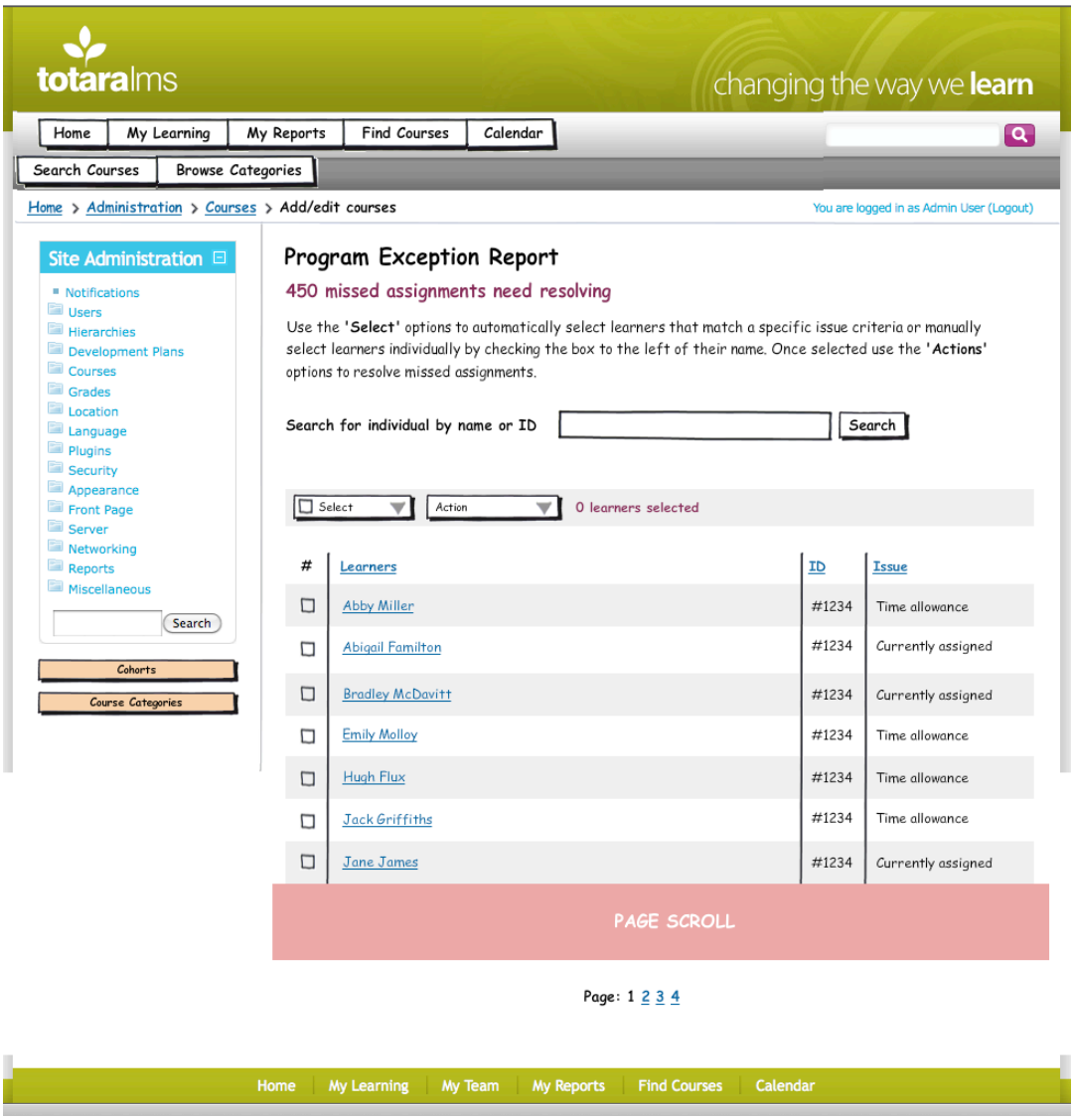
Screen reference: PM06-06.png

PM07-01: Exception report

The exception report is designed to catch any learners assigned to a program with 'missed assignments' (errors/issues etc) that need resolving.

The interface for the report has been designed to allow issues to be resolved as quickly as possible, with as few clicks as possible, while still retaining flexibility within the interface for additional functionality.

- Two of the main catchment issues that have been identified:
- The learner does not have enough time to complete the program as they may have joined a program at a later date.
- The program already exists within one of their learning plans.



Screen reference: PM07-01.png

Element	Comment
Number of missed assignments	Total number of missed assignments within the exception report.
Descriptive text	Use the 'Select' options to automatically select learners that match a specific issue criteria or manually select learners individually by checking the box to the left of their name. Once selected use the 'Actions' options to resolve missed assignments.
Search for individuals	Quick search for specific individuals within the exception report. Search by name or ID. Allows managers to contact admins with requests specific to individuals
Select	This is not a standard dropdown form element (see NOTE). The select box is designed to mass select users throughout the entire exception report based upon specific criteria. Once a selection is made the number of learners selected is indicated to the right of the action box See PM07-02: Select for more details
Action	This is not a standard dropdown form element (see NOTE). The Action functions only become available once users are selected either using the Selection options or manually selecting users. Actions that are shown are specific to and dependent upon the issues of the selected learners. See PM07-04: Action for more details
NOTE	Standard dropdown form elements are not suitable for this interface. They have limited display issues (i.e. the width of the dropdown box is determined by the longest text string within it) and the method for making a selection and then applying an action becomes cumbersome.

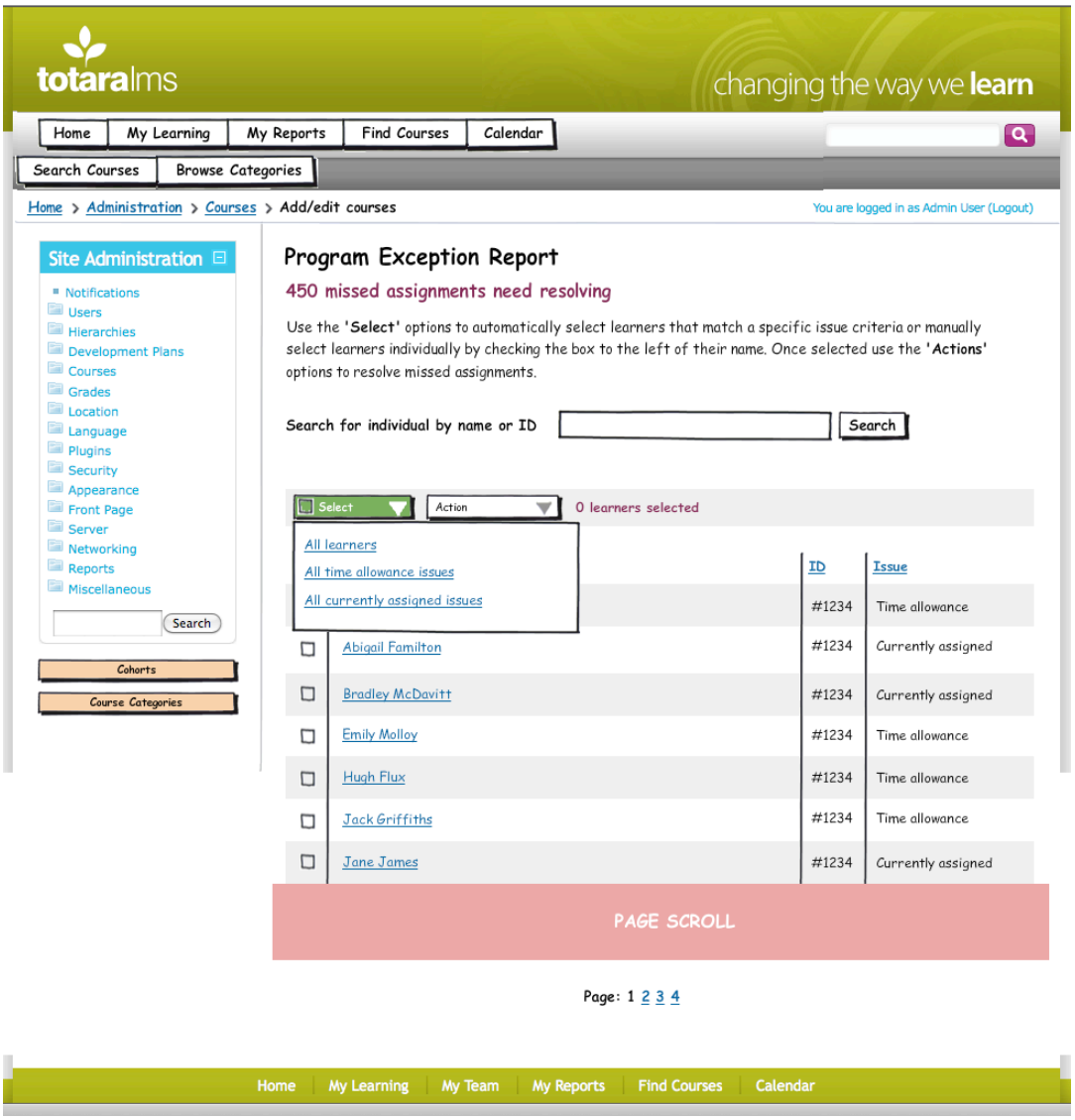
PM07-02: Select

The Select box, once clicked, opens to present the available selection options as text links. The three basic options are select:

- all learners
- all time allowance issues
- all currently assigned issues

Additional select options can easily be added to this list if other missed assignment issues come to light. It might also be a consideration to extend the select functionality by adding another column of data to the table from the user profile and using the values to make further selections (e.g. Location – select all learners from Brighton).

Pagination is used for the exception report but the selections are made through the entire list, not just on the page being viewed.

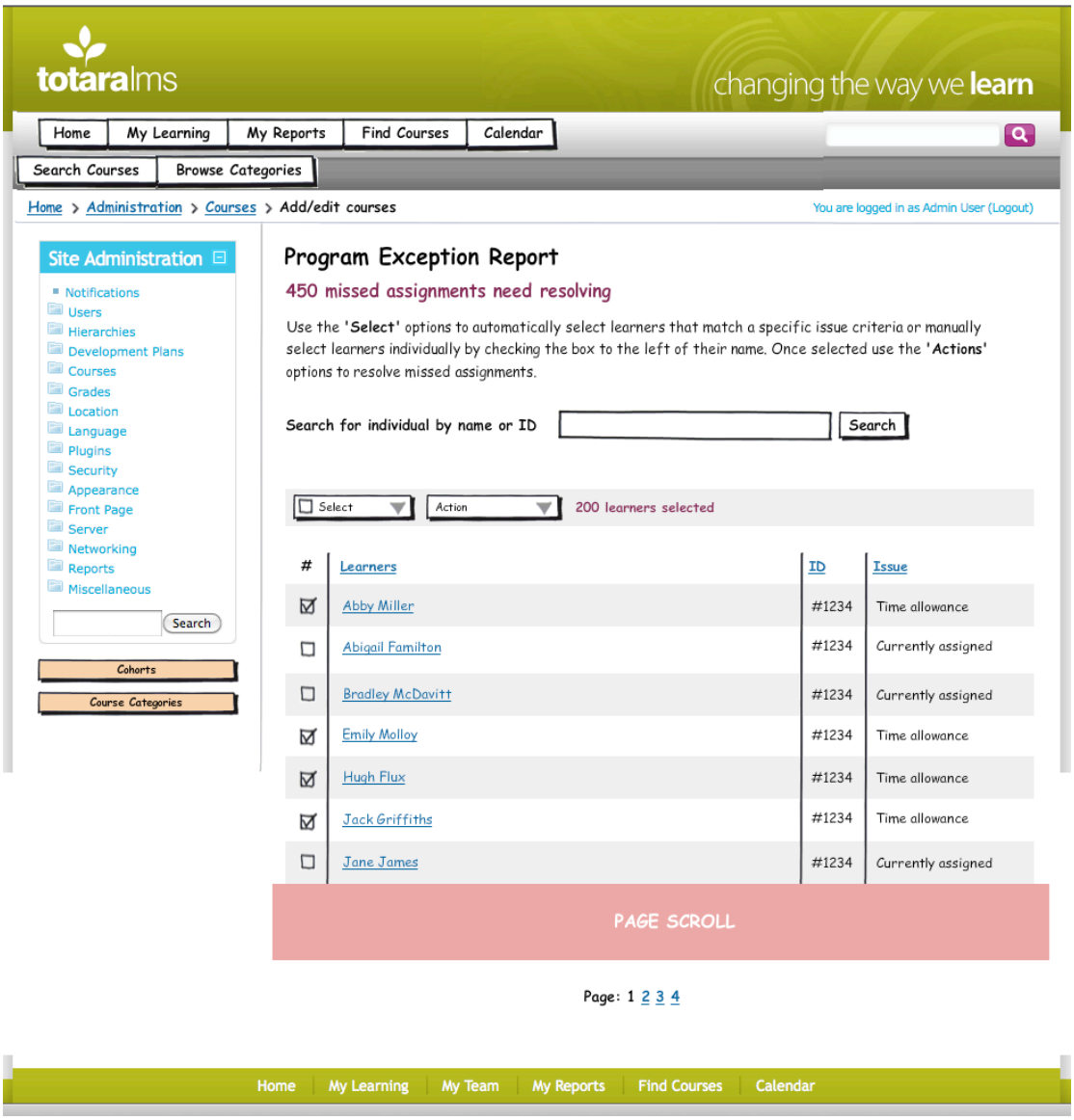


Screen reference: PM07-02.png

PM07-03: Selection made

Once an automatic selection has been made by clicking the desired link within the Select options box, the number of learners selected shows to the right of the Actions box and the checkboxes are ticked for all those selected.

Manual selections work in a very similar pattern and it is preferable if selections are retained when using the pagination. For example; manual select three learners on page 1 AND manually select 5 learners from page 2 THEN performing an Action. The Action options box only becomes active once an automatic or manual selection has been made.

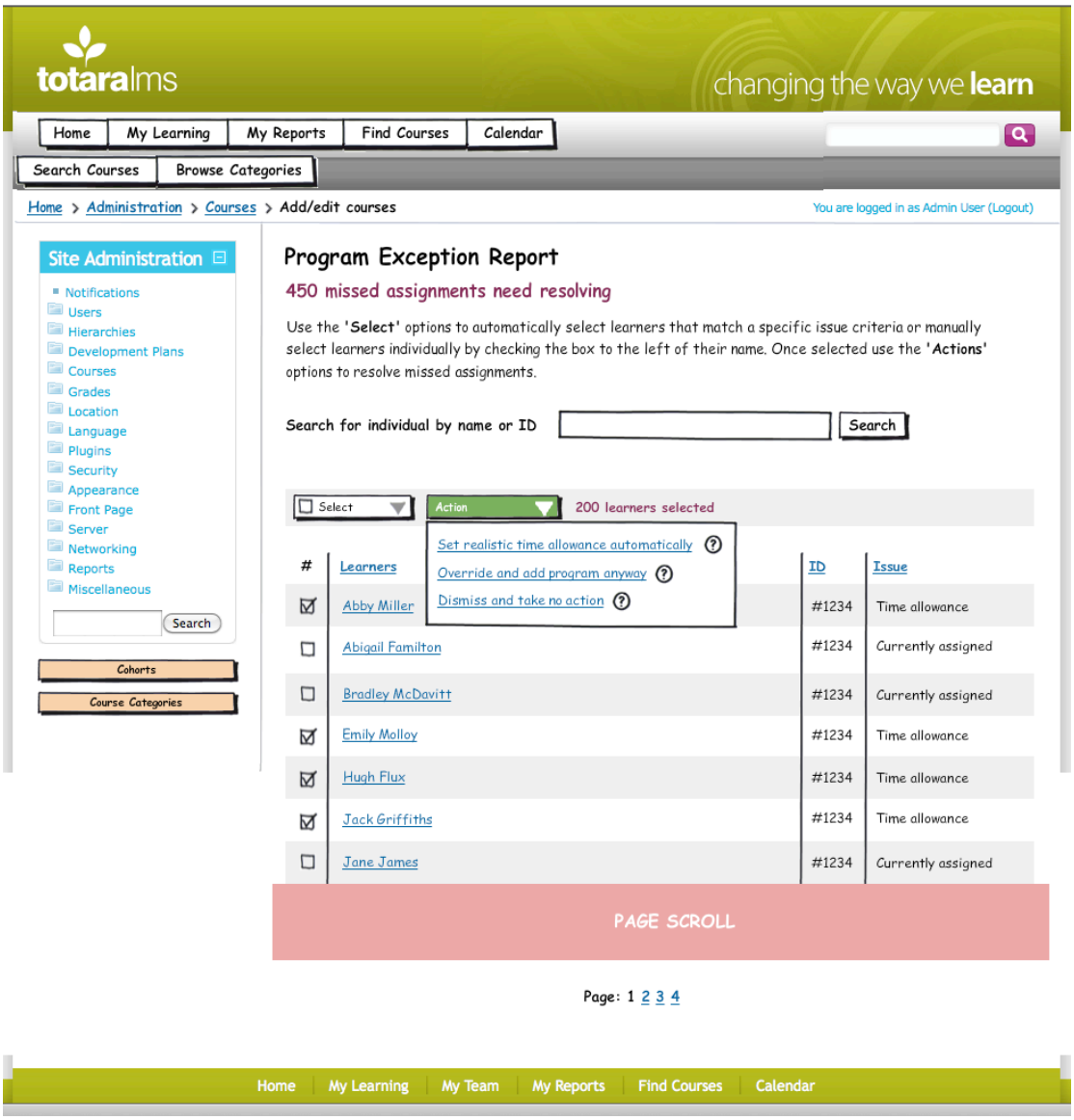


Screen reference: PM07-03.png

PM07-04: Action

Once a selection has been made the Action box, once clicked, opens to present the available actions that can be performed upon the learners selected.

If there has been a mixed selection of learners there would be a limited number of actions available, however there should be a note within the Actions box to provide feedback to the user that a mixed selection has been made. For example; 432 time allowance issues selected, 2 currently assigned issues selected. For more available actions please select one issue at a time.

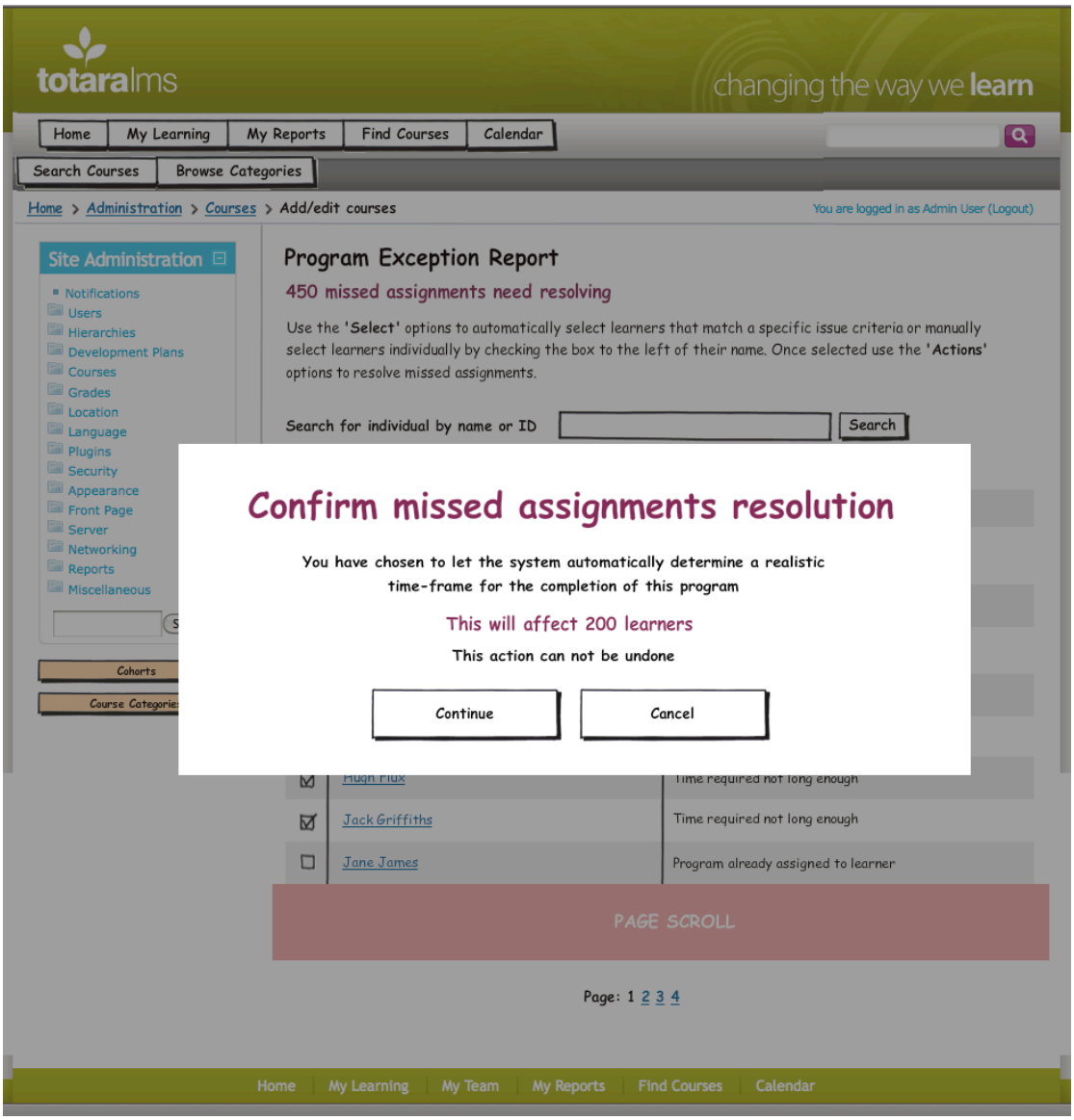


Screen reference: PM07-04.png

Actions	Comment
Set realistic time allowance automatically	**Time allowance** Use to automatically set a realistic time frame for the learner to complete the program. Time frame will be determined by the system. See use case 6.1
Override and add program anyway	**Time allowance** Disregard to the timing issue and add to the learner's plan. See use case 6.2
Add to required learning	**Currently assigned** Action shown when the program already exists within a learner's plan. Add the program to the learner's required learning. A copy of the program will remain in the learner's plan.
Dismiss and take no action	**All issues** Take no action but remove the learner from the exception report.

PM07-05: Confirmation

Confirmation lightbox shown once Action has been performed. States the action taken and the number of affected learners with options to cancel or continue.



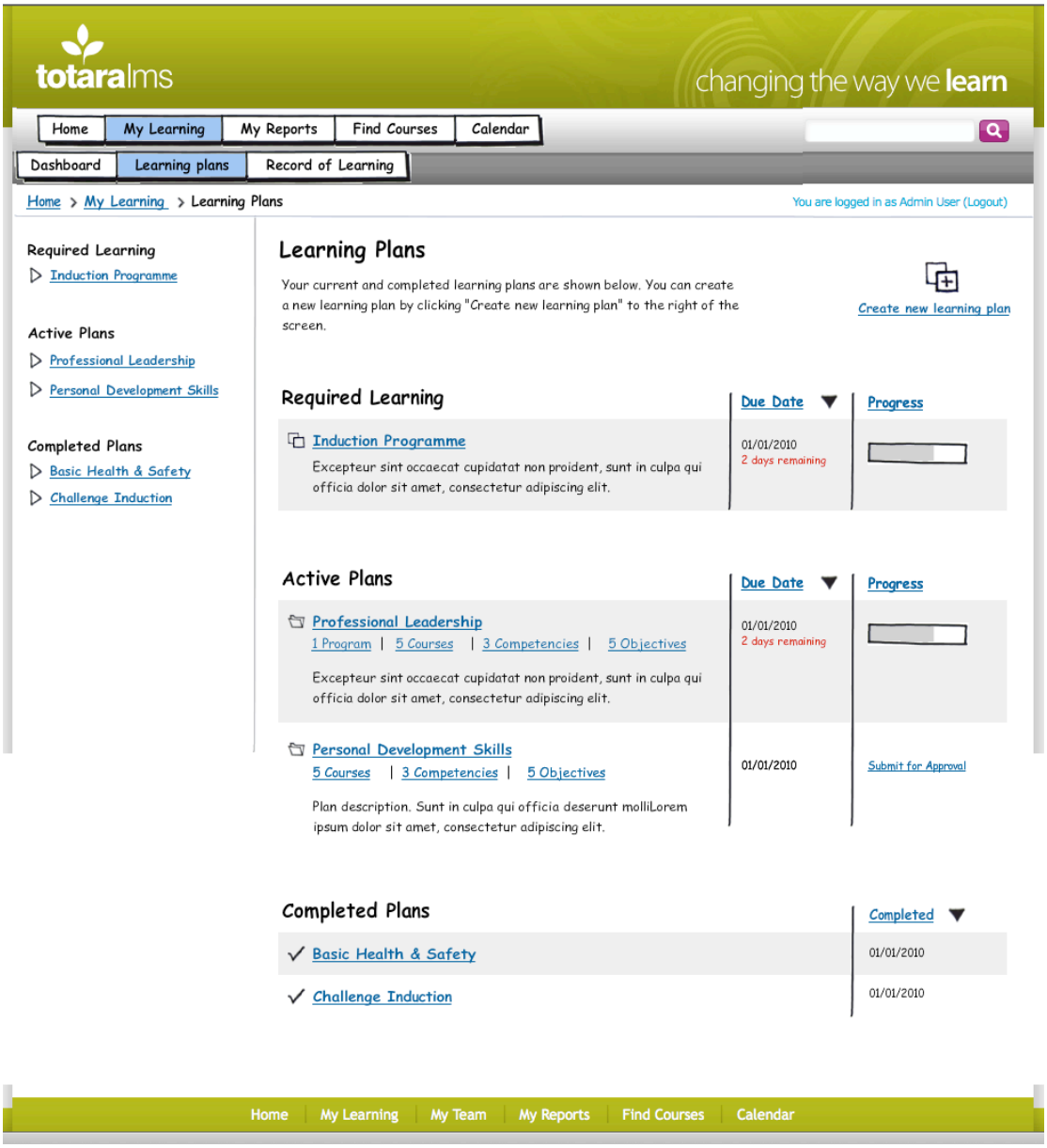
Screen reference: PM07-05.png

Learner Facing Screens

The learner facing screens for the program are designed to slot into the existing My Learning section at both plan and the new 'required learning' level. They are designed to look like and to some extent function like a course, keeping the interface simple and familiar to the learner.

LP01: Learning plans

Programs displaying within the learning plans are either shown in a new required learning section (similar to active, unapproved or completed plans) or an additional Programs section within a normal plan.



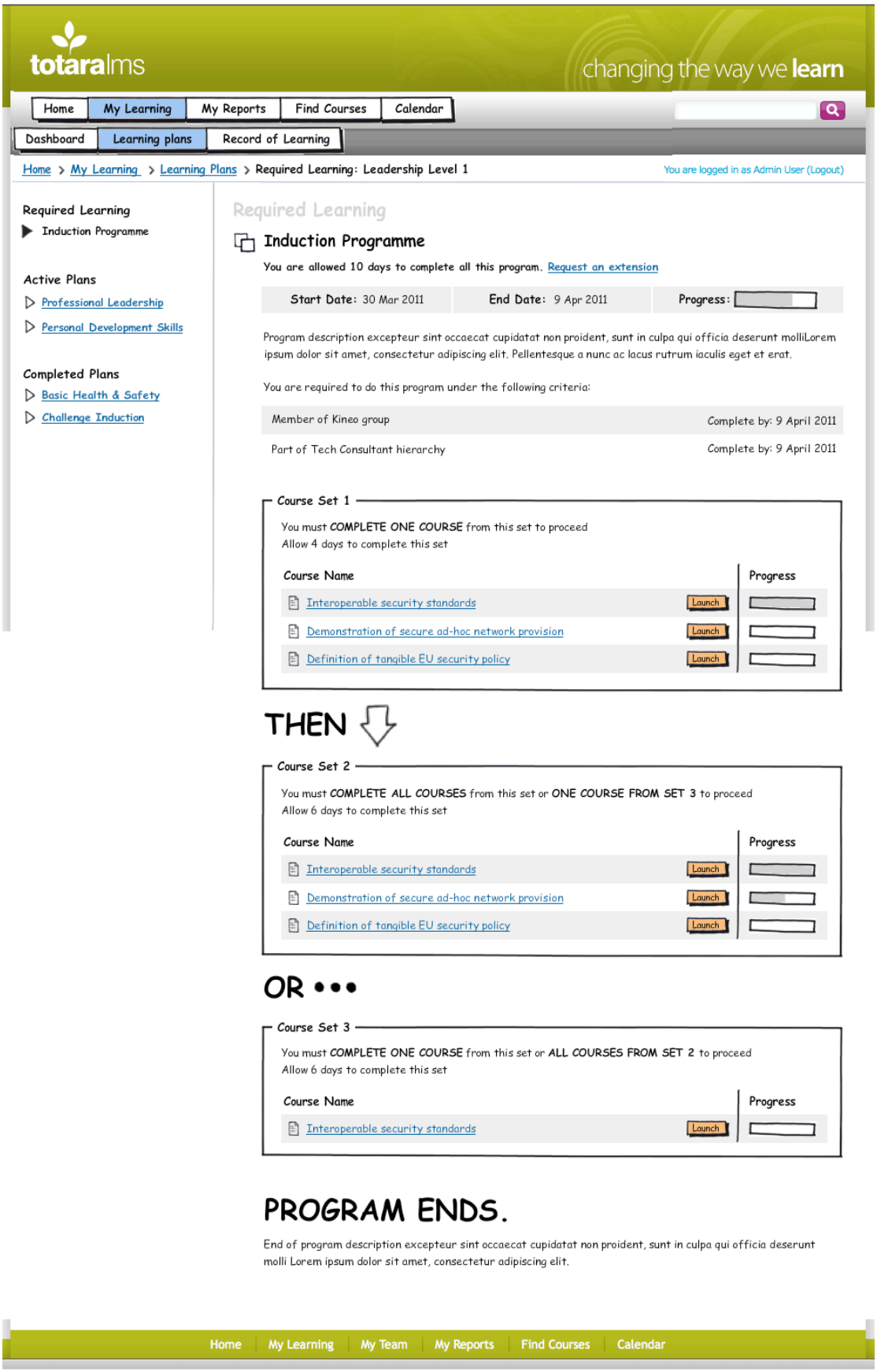
Screen reference: LP01.png

Element	Comment
Required learning	When a program is designated as required or mandatory, a new section to shown on the learning plans page with relevant links within the left-hand navigation column. To keep the interface simple, only programs form required learning; therefore if a single course is mandatory it must be wrapped within a program and set as required. The distinction between required and other learning then becomes very clear to the learner. The example above shows 'Induction Programme' as required learning. See LP02 for more details.
Programs with normal plans	If a program is added to a normal learning plan a new Programs section or tab is shown. See LP03 and LP04 for more details.

LP02: Required learning

From LP01, clicking on 'Induction Programme' leads into the detailed program view. There are no tabs for courses, competencies, objectives or evidence.

The program displays the information, course flows, operators and dependencies defined through the program creation screens.

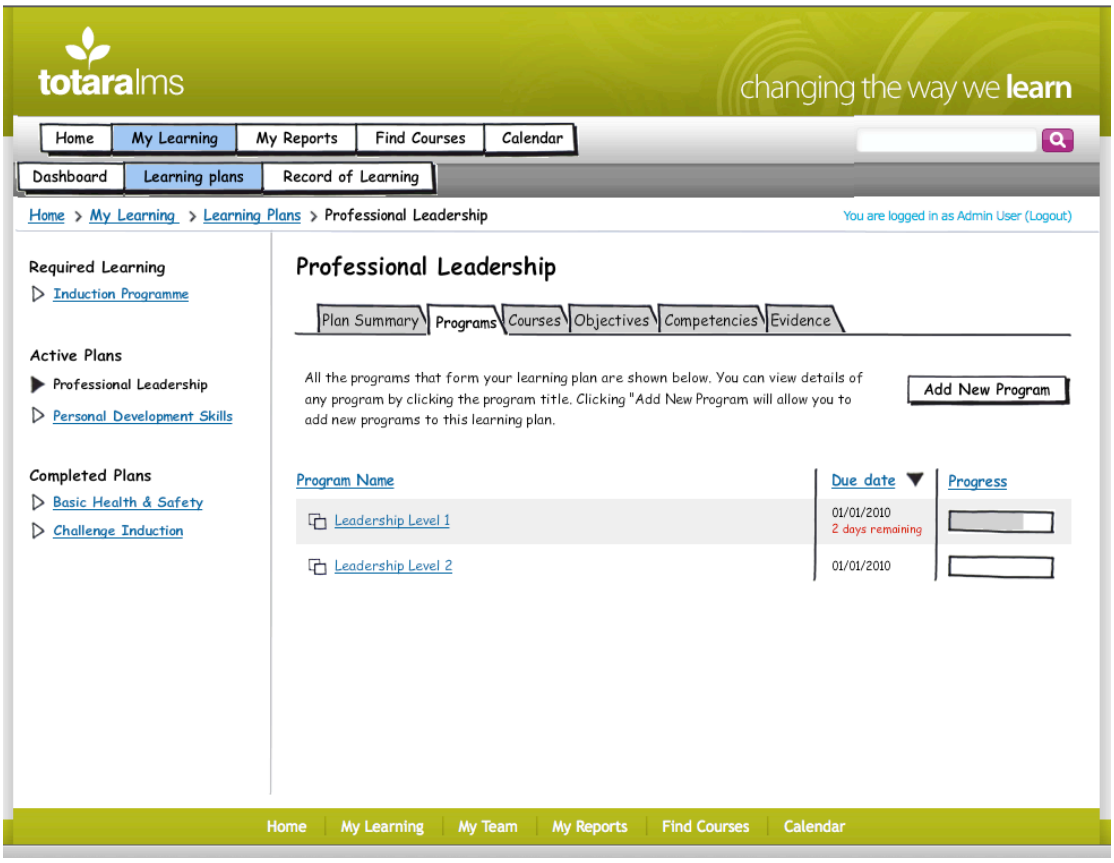

totaralms
changing the way we learn
Home
My Learning
My Reports
Find Courses
Calendar
Dashboard
Learning plans
Record of Learning
Home > My Learning > Learning Plans > Required Learning: Leadership Level 1
You are logged in as Admin User (Logout)
Required Learning
Induction Programme
Active Plans
Professional Leadership
Personal Development Skills
Completed Plans
Basic Health & Safety
Challenge Induction
Required Learning
Induction Programme
You are allowed 10 days to complete all this program. Request an extension
Start Date: 30 Mar 2011
End Date: 9 Apr 2011
Progress:
Program description excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt molliLorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque a nunc ac lacus rutrum iaculis eget et erat.
You are required to do this program under the following criteria:
Member of Kineo group
Complete by: 9 April 2011
Part of Tech Consultant hierarchy
Complete by: 9 April 2011
Course Set 1
You must COMPLETE ONE COURSE from this set to proceed
Allow 4 days to complete this set
Course Name
Progress
Interoperable security standards
Demonstration of secure ad-hoc network provision
Definition of tangible EU security policy
Launch
THEN
Course Set 2
You must COMPLETE ALL COURSES from this set or ONE COURSE FROM SET 3 to proceed
Allow 6 days to complete this set
Course Name
Progress
Interoperable security standards
Demonstration of secure ad-hoc network provision
Definition of tangible EU security policy
Launch
OR •••
Course Set 3
You must COMPLETE ONE COURSE from this set or ALL COURSES FROM SET 2 to proceed
Allow 6 days to complete this set
Course Name
Progress
Interoperable security standards
Launch
PROGRAM ENDS.
End of program description excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt molli Lorem ipsum dolor sit amet, consectetur adipiscing elit.
Home
My Learning
My Team
My Reports
Find Courses
Calendar

Screen reference: LP02.png

Element	Comment
"You are allowed 10 days to complete all this program."	Information is intended as a guide to the time allowance given to complete the entire program, defined at PM03-01 Program content. Better instructions to use may be "You are required to complete this program within <period>"
Request an extension	Link provides a lightbox interaction to allow the learner to send a request to the administrator for an extension to the time allowance.
Start / End dates	Defined at PM04-07 setting of completion criteria based upon the learner's enrolment / assignment.
Progress	Indicates progress through all courses within the program.
Description	The main program description defined at PM02 general program settings.
Requirement table	States the criteria as to why the learner is required to complete the program. Related to enrolment defined at PM04-01 Program enrolment.
Course sets and dependencies	Defined at PM03-01 Program content.
Program ends	Clear visual definition that the program ends once the sequence indicated above is completed.
End of program description	Optional end of program description defined at PM02 general program settings. Provides the learning with 'next step' information and guidance.

LP03: Program listings

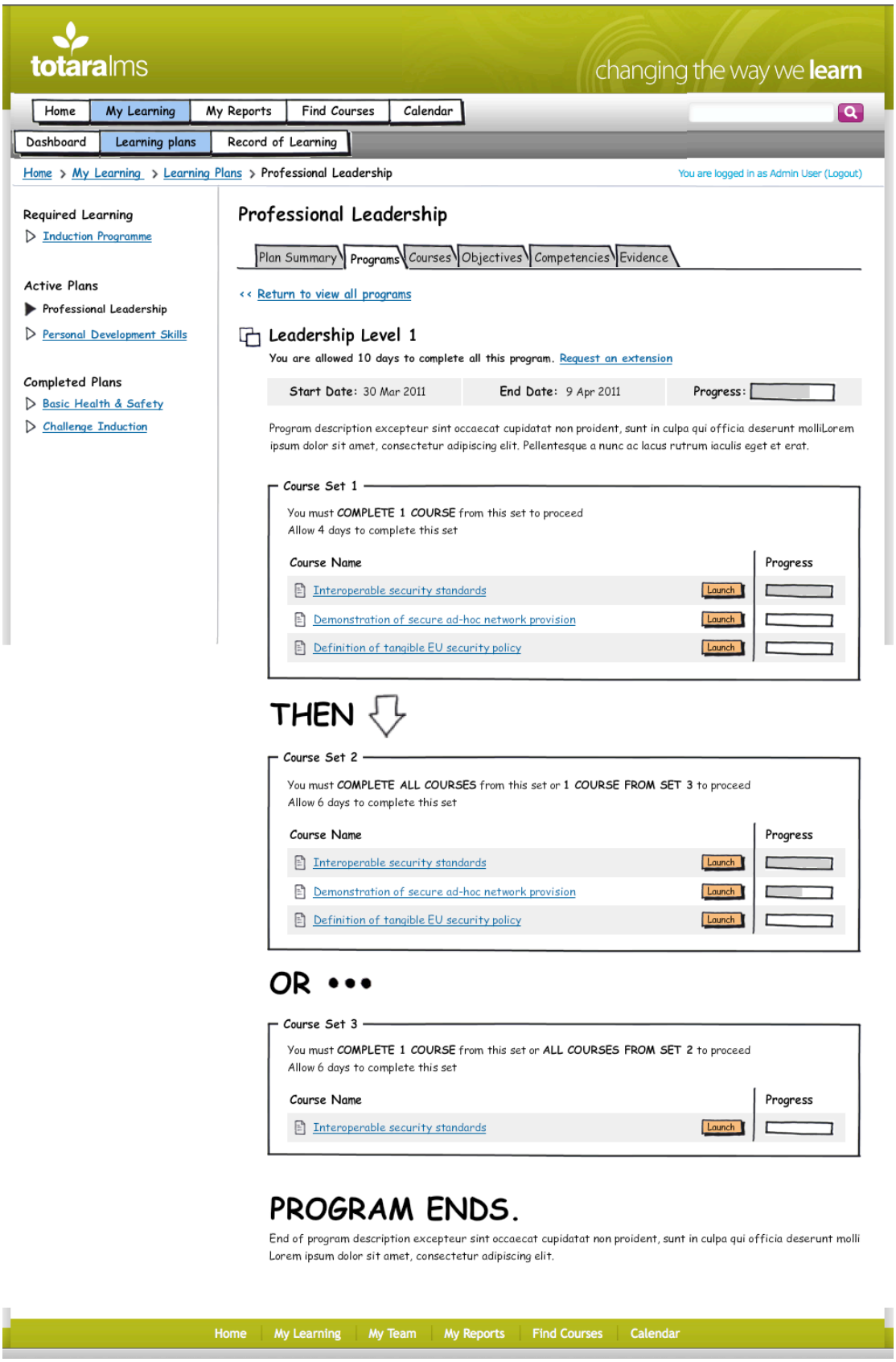
When a program is added to a regular learning plan, a new 'Programs' tab is shown alongside Summary, Courses, Competencies, Objectives and Evidence. The page functions the same as a normal course listings page, with each program shown in a table with an option for the learner to add a new program if the permissions allow.



Screen reference: LP03.png

LP04: Program detail

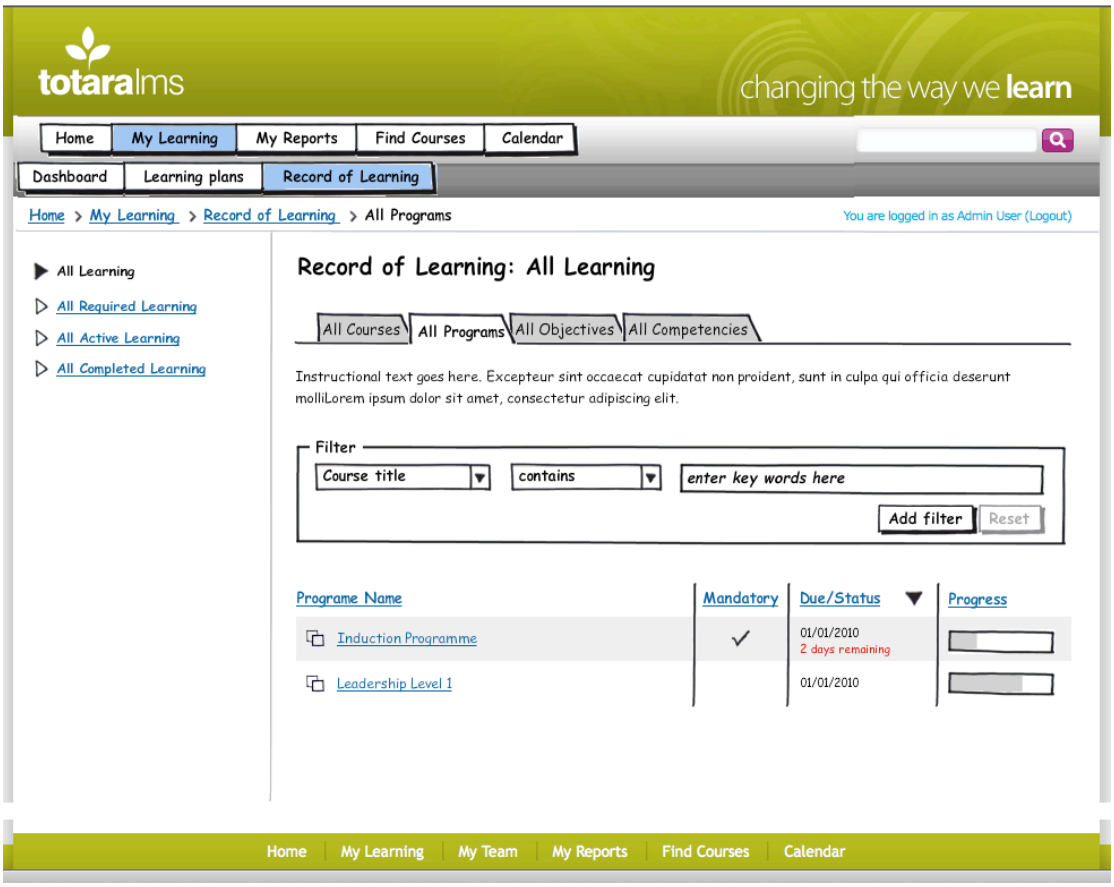
The program detail screen is identical to LP02 Required learning screen with the differences of the plan sections tabs and the table showing the reasons why the learner is required to complete the program.



Screen reference: LP04.png

LP05: Record of learning

Programs within the record of learning display within their own tab and follow the flow same as courses, competencies and objectives. The only additional is the table column, which shows if a program in mandatory (i.e. part of the required learning) or not.



Screen reference: LP05.png