Business Solution ELO Learning

Business Solution ELO Learning 1.01

Table of contents

Introduction

Structure of the documentation

The goal of this documentation is to explain all functions of Business Solution ELO Learning.

Basics

The Basics chapter explains the basics of the ELO Learning program interface.

Getting started

The Getting started chapter essentially explains how ELO Learning works. This chapter is short and helps experienced ELO users get started quickly.

Possible actions and other elements

The remaining chapters address possible actions and other elements of ELO Learning.

Target audience

This documentation is addressed to Business Solution ELO Learning users who manage courses. Separate documentation is available for administrators on the ELO SupportWeb.

The scope of functions presented in this documentation may differ greatly from those in your client.

If you do not find functions described in this documentation in your client, you do not have permission to perform the action.

Basics

Basic principle

Business Solution ELO Learning assists you in managing and booking courses.

ELO Learning consists of two components:

- Course administration: Courses are managed in the ELO client. You can create courses, sessions, and participants here and get an overview of available courses on the dashboard.
- Learning platform: Participants can enroll in and attend courses on the corresponding learning platform.

If ELO Learning is used together with [ELO Knowledge](#), individual courses can be linked to spaces in order to allow discussions among the participants.

Different categories of courses are available:

- Online: This category includes:

    ◦ Virtual classrooms: These courses are attended via the optional integration with provider GoToWebinar.
    ◦ E-learning courses
    ◦ Videos

- Face-to-face: The course is carried out on site, and not on the learning platform.

Course enrollment: Depending on the settings, courses can either be booked on the learning platform, or participants are enrolled by the course administrator.

You can create individual courses or learning paths, which are made up individual related courses.

Once participants have successfully completed courses, certificates can be created automatically.

General note

ELO Learning works with the following clients:

- [ELO Web Client](#)
- [ELO Java Client](#)
- [ELO Desktop Client](#)

> **Information**
>
> In this documentation, we use screenshots from the ELO Web Client.

Requirements

Your administrator must have configured ELO Learning for you.
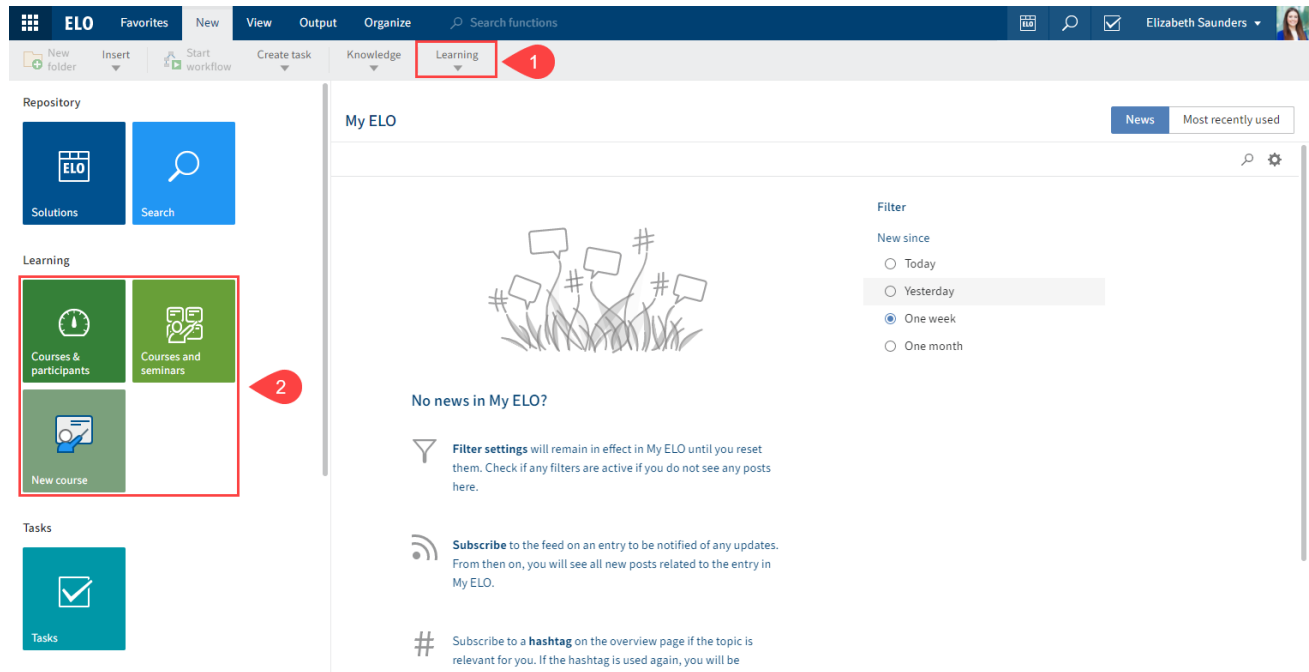
Program interface

Fig.: Business Solution ELO Learning program interface

You will find ELO Learning functions in the following areas:

1 'Learning' group on the 'New' ribbon tab

You can create new courses via the *Learning* group. Once you have created a course and you select it, the *Course* tab appears. You can edit the course using the functions on the *Course* tab.

2 'Courses & participants', 'Courses and seminars', and 'New course' tiles in the tile navigation

The *Courses & participants* and *New course* tiles are only available if you can create courses.

The *Courses and seminars* tile is available to all users who can attend courses. This tile takes you to the learning platform.
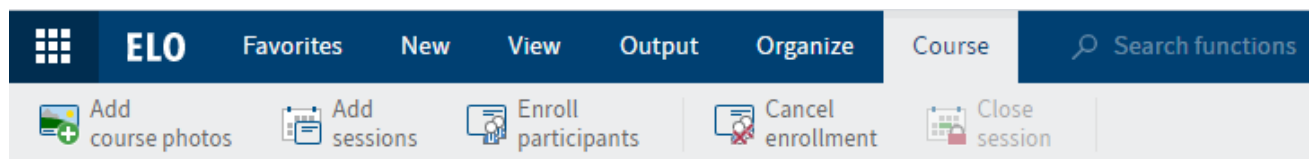

Fig.: 'Course' tab

3 'Course' tab

The *Course* tab appears if you have created a course and selected it in the repository in the *Courses* folder or on the dashboard.

This tab contains functions for editing the selected course.

Fig.: 'Enrollment' tab

4 'Enrollment' tab

The *Enrollment* tab appears if you select a course participant in the repository in the *Enrollments* folder or on the dashboard.

This tab contains functions relevant for course participants.

Repository

The structure and appearance of the repository depend greatly on your specific configuration. The default state is described here.

Courses

Courses are the foundation for all other functions in the course management area. A folder is created for each course.
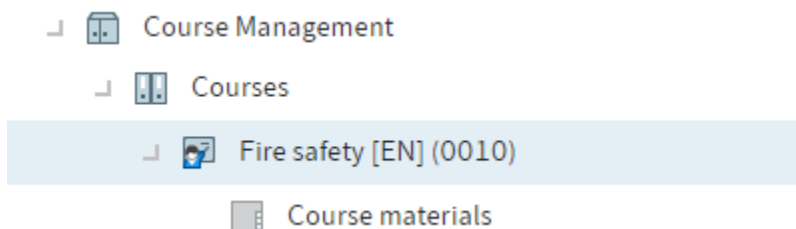

Fig.: Course folder

Courses are stored under *//Course management//Courses*.

Courses can have the following statuses:

- D – Draft: The course has been created and is now being edited.
- T – Preview: The course is still being edited, but has been announced on the learning platform.
- P – Released: The course has been released on the learning platform and can be booked.

Sessions

Sessions are created within courses. Face-to-face training and virtual classrooms require sessions. You cannot create sessions for the other course types.

Participants

For courses without sessions, participants are created within the courses, and for courses with sessions, they are created within the sessions.

Course form

Fig.: 'Course' form

Each created course contains a form, which you can later edit.

The form contains the tabs *Overview*, *Course data*, *Contents*, *Requirements*, and *Settings*.

With the exception of the *Overview* tab, the fields of all tabs can be edited. The *Overview* tab uses information from the fields on the other tabs.

Course materials

On creation, each course folder contains the *Course materials* folder. In this folder, you can create course materials that the learning platform then offers participants for download.

Session form

Session
Classroom 16.08 09:00

Course number	E2503		Course	First aid training

General

Session number	S0001		Type *	On-Site
Label *	Classroom			

Description

Session data

Date *	Aug 16, 2021		Max. number of participants	15
Session start *	09:00		Session end *	17:00
Instructor				

Location

Name				

Address

Save	Print

Fig.: 'Session' form

Each created session contains a form, which you can later edit.

Besides the form, the session folder contains the participants enrolled in this session.

Participant form

Enrollment
Elena Rodriguez

| Participant | Course data |

Enrollment

Status	ENROLLED	Time required	

Personal data

ELO user	Elena Rodriguez		
First and last name	Elena Rodriguez		
Title		Education	
Position	Accountant	Department	Accounting
Company	Contelo Corp.	Location	Corporate headquarters

| Save | Print |

Fig.: 'Enrollment' form

Each created participant contains a form.

The form contains the tabs *Participant* and *Course data*.

Several fields on the *Participant* tab can be edited, but this is generally unnecessary. The status of a participant can be changed via the drop-down menu. However, normally the status is updated automatically when you or participants trigger actions, for example closing an e-learning session.

The fields on the *Course data* tab give you an overview of the course and cannot be edited.

Getting started

In this section, we will present ELO Learning based on two examples. These examples perform the most important functions of ELO Learning, from creating a course to releasing it on the learning platform.

This is a short guide. Follow the links for a more detailed description of the individual steps.

Learning path assigned to participants

All new employees in your company are onboarded via a learning path. This learning path contains an e-learning course and a video.

The learning path is assigned by the course administrator and cannot be booked by employees themselves.

You need: A finished e-learning course and a video

1 Create courses

Fig.: 'Create a course' dialog box

1. Create a new *Learning path* type course: *New tab > Learning > New course*. In this example, leave *Release date* blank.

2. Create two courses with the types *E-learning* and *Video*.

These courses have to be edited before you can release them on the learning platform. You will find the courses in the repository in the *//Course management//Courses* folder.

> **Information**
>
> The order of further steps shown is only one of many possibilities.

2 Create course contents

Fig.: E-learning in the course folder

1. Create the e-learning right in the specific course.

Fig.: Video in the 'Video' folder

1. The *Video* folder is automatically created for *Video* type courses. Create the video in the *Video* folder. You can file videos with identical contents but different formats to this folder.

3 Add course photos

Configure course photos for the learning platform. In this example, you need course photos for the learning path as well as for the individual courses.

4 Add course information

Enter additional information related to the courses via the form. This information has the following functions:

- On the *Settings* and *Course data* tabs, you can configure where the course will become visible on the learning platform and when in the *Status* and *Release date* fields.
- The information about the course is shown on the learning platform.

Edit the forms for the courses:

Course

About our company [EN] (0008)

| Cover sheet | Course data | Contents | Requirements | Settings |

Visibility

☐ Course can be found in the course catalog

☐ Course is shown under "My courses"

Fig.: 'Visibility' on the 'Settings' tab

1. As you do not want the courses to be visible outside of the learning path, do not check the *Course can be found in the course catalog* and *Course is shown under "My courses"* boxes.

2. Enter additional information related to the individual courses for the learning platform. You can control their release via the learning path.

Course

Getting started [EN] (0007)

| Cover sheet | Course data | Contents | Requirements | Settings |

Previous knowledge required

| <> | ¶ | B | I | S | ☰ | ⌘ |

Required courses

Label

About our company [EN] (0008)   ✎ ✕

Add course

Fig.: Course dependency on the 'Requirements' tab

1. Participants should watch the video before starting the e-learning course. In the e-learning form, select the video on the *Requirements* tab under *Required courses*.

Edit the learning path form:

Course

Your start at our company [EN] (0006)

| Cover sheet | Course data | Contents | Requirements | Settings |

Visibility

☐ Course can be found in the course catalog

☑ Course is shown under "My courses"

Fig.: 'Visibility' on the 'Settings' tab

1. As you don't want the participants to be able to enroll in the learning path themselves, under *Settings*, check the *Course is shown under "My courses"* box. Do not check the *Course can be found in the course catalog* box.

Course

Your start at our company [EN] (0006)

Cover sheet	Course data	Contents	Requirements	Settings

Summary

```
< >   ¶   B   I   S   ☰   ⌖
```

Included courses

Label

About our company [EN] (0008)	✎	✕
Getting started [EN] (0007)	✎	✕

Add course

Fig.: 'Included courses' on the 'Contents' tab

    1. On the *Contents* tab, go to *Included courses* and select the video and the e-learning.

Course

Your start at our company [EN] (0006)

Cover sheet	Course data	Contents	Requirements	Settings

Course number	0006
Status	P - Released

Fig.: 'Released' status on the 'Course data' tab

    1. On the *Course data* tab, select the status *P – Released*.

As only enrolled participants can see the learning path on the *My courses* tab of the learning platform and no participants have been enrolled yet, the learning path is not yet visible on the learning platform.

5 Enroll participants

Enroll the new employees in the course: *Course tab > Enroll participants*.

The learning path now appears on the learning platform on the *My courses* tab for the selected employees.

6 Send message to participant

To notify new employees of the learning path, you can write them a message.

Course with multiple sessions for enrolling via the learning platform

You want to create a virtual classroom with multiple sessions. Before release, the course should be available as a preview on the learning platform. Users enroll themselves in their preferred session. Course materials are available for download.

For course participants to be able to discuss the course contents outside of the virtual classroom, link the course with an ELO Knowledge space.

You need: A GoToWebinar account, ELO Knowledge

1 Create course

Create a new *Virtual classroom* type course: *New tab > Learning > New course*. In the *Release date* field, select a date to release the course. Once the selected date has been reached, the course is automatically released on the learning platform.

The course now has to be edited before you can be release it on the learning platform. You will find the courses in the repository in the *//Course management//Courses* folder.

> **Information**
>
> The order of further steps shown is only one of many possibilities.

2 Add course photos

Configure course photos for the learning platform.

3 Add course information

Enter additional information related to the course via the form. This information has the following functions:

- On the *Settings* tab, you can configure where a course is visible on the learning platform.
- The information about the course is shown on the learning platform.

Edit the course form:

Course
Onboarding [EN] (0009)

| Cover sheet | Course data | Contents | Requirements | Settings |

Visibility

☑ Course can be found in the course catalog

☑ Course is shown under "My courses"

Fig.: 'Visibility' on the 'Settings' tab

1. As you want participants to be able to enroll in the course themselves, check the *Course can be found in the course catalog* box. Also check the *Course is shown under "My courses"* box to give enrolled participants quick access to the course on the *My courses* tab.

Course
Onboarding [EN] (0009)

| Cover sheet | Course data | Contents | Requirements | Settings |

| Course number | 0009 |
| Status | T - Preview |

Fig.: 'Preview' status on the 'Course data' tab

1. For the course to appear on the learning platform as a preview, on the *Course data* tab, set the status to *T – Preview*. The course appears on the learning platform as soon as you save your changes, but cannot be booked yet.

Knowledge management

Optionally, you can connect this course to a space configured in ELO Knowledge.

| Space | Organization |

Fig.: Configured space on the 'Course data' tab

1.

On the *Course data* tab, select a space for the participants under *Knowledge management*.

2. Enter additional information related to the course for the learning platform.
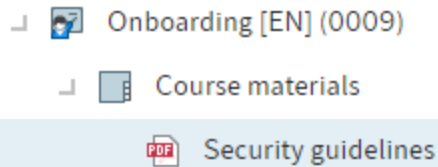
4 Create course material

Fig.: Filed course material

The *Course materials* folder is created automatically for all courses. File your course materials to this folder.

> **Information**
>
> As soon as you enter instructors for the course, they are given access to the course and can create course materials and course contents.

5 Create sessions

Select the course and create sessions: *Course tab > Add sessions*.
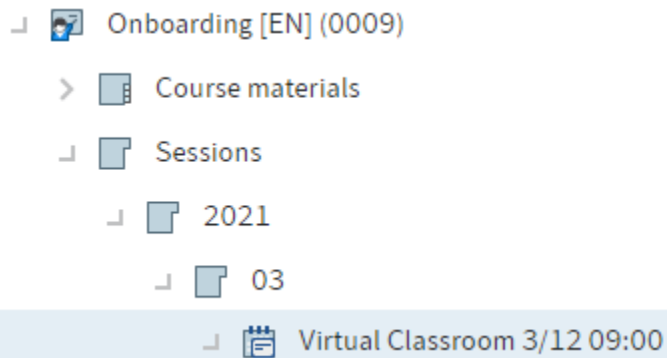
Fig.: Session

6 Add session information

Fig.: Session instructor

As all sessions are carried out by different instructors, enter an instructor separately for each session in the form.

7 Release

Once the date selected under *Release date* has been reached, participants can enroll via the learning platform.

8 Close session

For participants to get their certificates, close the session once it has taken place: *Course tab > Close session*.

Create course

Information

Courses are the foundation for all other functions in the course management area. Once you have created courses, you can create sessions and participants. You can create courses from any position in your client.

> **Information**
>
> If the option *Use simple ribbon* is enabled in the configuration for the ELO Web Client, the ribbon will not be shown on your *My ELO* home screen. In this case, first navigate to the *Repository* work area.

Method

1. On the *New* tab, click *Learning > New course*.
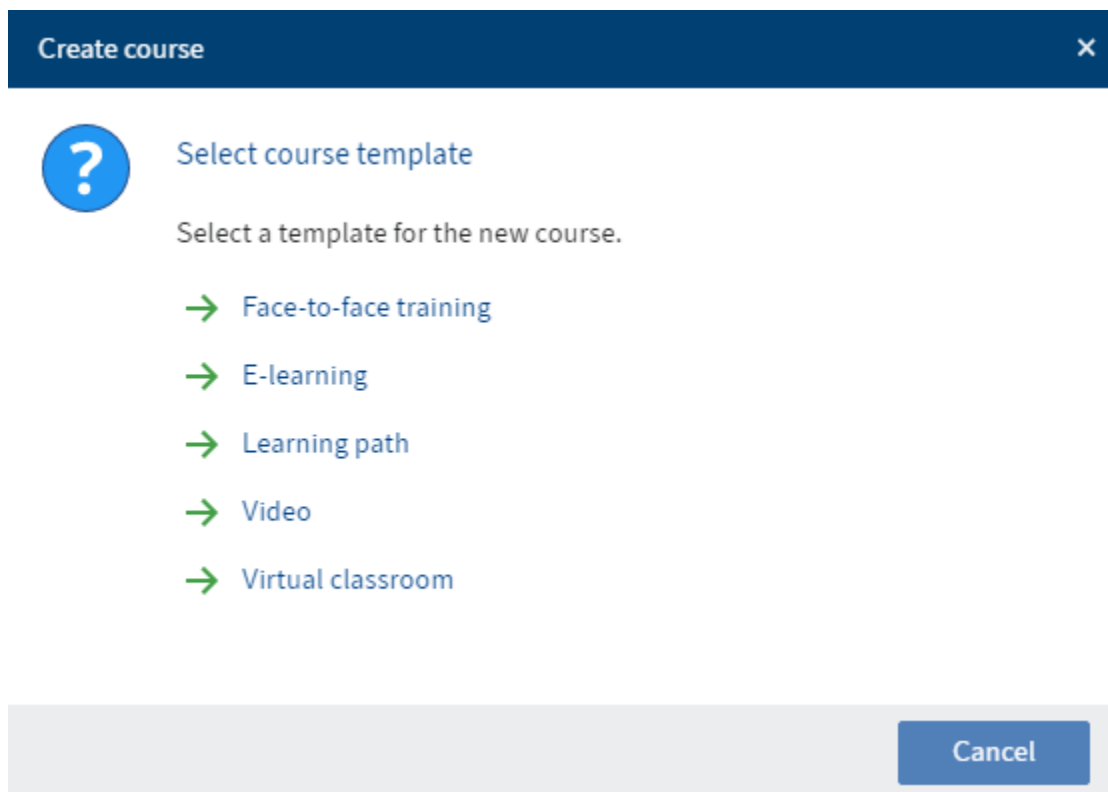
Fig.: 'Select course template' dialog box

2. In the *Select course template* dialog box, select the template for your course.

   By selecting a course template, appropriate metadata is generated automatically when you create a course.

Fig.: 'Create a course' dialog box

3. In the *Create a course* dialog box, complete the fields as required.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Field	Meaning
Course number	The course number is generated automatically as soon as you have created the course. If you enter an internal number in the field, no automatic number is generated. This field can be read-only meaning it is only possible for numbers to be generated automatically.
Status	Leave the status as *Draft* if you do not want to release or announce the course on the learning platform yet.
Instructor	If you enter an instructor for the course, they are given access to the course and can create course materials and course contents.
Certificate template	Configure a template for the certificate that participants receive after completing the course.

4. Click *OK*.

Result

⌐ 🔲 Course Management

⌐ 🔳 Courses
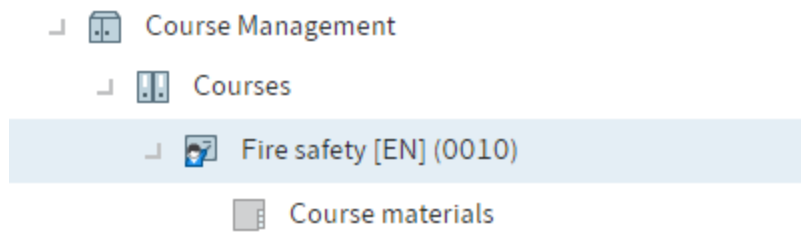
⌐ 📘 Fire safety [EN] (0010)

📂 Course materials

Fig.: Course folder

A folder is created for the course. A *Course materials* child folder is automatically created for every course. In this folder, you can file course materials that the learning platform then offers participants for download.

Outlook

The course can now be edited.

You can perform all actions described in the chapter Edit course.

If you have set the course status to *Preview* or *Released*, you must also set the display type on the *Settings* tab of the course form.

Edit course

Once you have created a course, you need to edit the release settings.

All courses can be released on the learning platform, regardless of whether the course will take place on the learning platform. This allows participants to enroll in all course types via the learning platform, provided you have released the course there.

This chapter addresses the following topics:

- Add course information
- Create learning path
- Add course photos
- Create course material
- Insert e-learning
- Insert video file
- Embed YouTube or Vimeo video

Add course information

Information

Once you have created a course, you can enter additional information in the course form. Some of this information is shown on the learning platform as the course description.

> **Information**
>
> For a course to be able to appear on the learning platform, the *Settings* tab has to be edited.

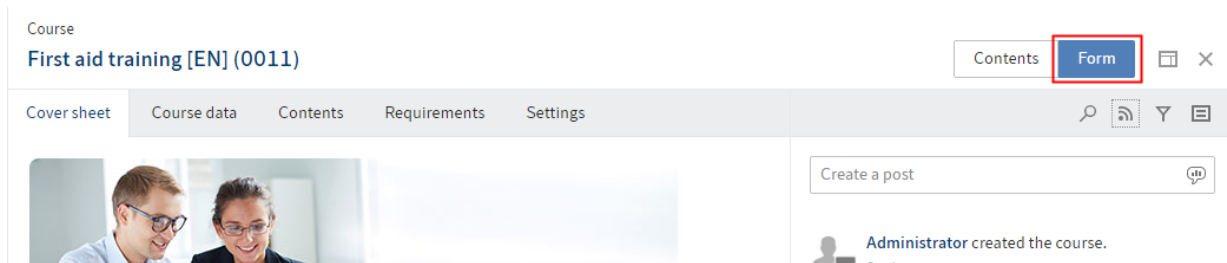Method

1. Select the course whose form you want to edit.

   Fig.: 'Form' button

   Optional: If the content of the course is shown, click *Form*.

2. Change or complete the fields on the *Course data*, *Contents*, *Requirements*, and *Settings* tabs as required.

'Course data' tab

Status: You can change the status of the course via the drop-down menu.

Status	Use
D – Draft	Do not change this status as long as you do not want the course to be visible on the learning platform.
T – Preview	Use this status if a course is still being edited, but you want to announce it on the learning platform. Courses with this status cannot be booked or completed yet. You can use the *Course description* field to configure an announcement text.
P – Released	Use this status so that a course can be booked and/or completed on the learning platform.

Information

For the course to be visible on the learning platform, you also have to edit the visibility in the *Settings*.

Field	Meaning
Instructor	In the course form, enter an instructor if this person is carrying out all sessions. Otherwise, configure the instructor in the individual sessions. If you enter an instructor for the course, they are given access to the course and can create course materials and course contents.
Certificate template	If you configure a certificate template here, participants receive a certificate after completing the course. With e-learning courses, the certificates are created automatically once the course is completed. For courses with sessions, the certificates are automatically created when the session has been closed with the Close session function.
Release date	If you enter a release date here, the status of the course automatically changes to *P – Released* on this date.
Space	If you use ELO Knowledge in addition to ELO Learning, you can link a course to a space here. This allows participants to discuss technical topics outside of the course. On the learning platform, the link *Discussion on the topic* is created and links to the associated space.

Fig.: Link to ELO Knowledge on the learning platform

'Contents' tab

Field	**Meaning**
Summary	The text appears on the learning platform on the start page for the course.

'Requirements' tab
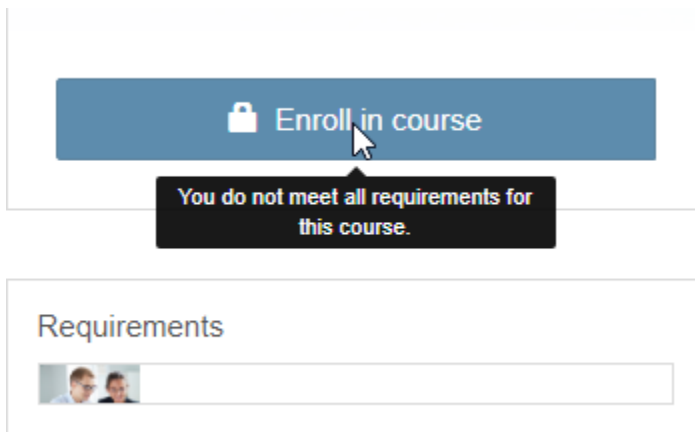
Fig.: Locked course on the learning platform

Field	**Meaning**
Required courses	If you select courses here, participants can only begin the course if they have already completed the required courses. Until then, the button to enroll in the course is locked.

'Settings' tab

Visibility: With these options, you can control where the courses are shown on the learning platform.

Option	Meaning
Course can be found in the course catalog	The course is released on the learning platform on the *Course catalog* tab. With this option, participants can book courses themselves via the course catalog. By checking this box, you can also determine whether a course that is part of a learning path also appears as a separate course in the course catalog.
Course is shown under "My courses"	The course appears for enrolled users on the *My courses* tab on the learning platform. With this option, participants can be assigned courses they are unable to book themselves via the course catalog. Once a course administrator has enrolled participants using the Enroll participants function, the course is visible to the participants. Visibility on the *My courses* tab is also a quick way to access enrolled or started courses and to get an overview of completed courses.

Information

If you check the *Course can be found in the course catalog* box in the form for a learning path, it is shown under *Learning paths*, and not in the course catalog.

If you check the *Course can be found in the course catalog* box in the form for a video, it is shown under *Media library*, and not in the course catalog.

Please note

With *Visibility*, you can control the general visibility of a course on the learning platform. You also have to change the status of the course on the *Course data* tab for it to appear on the learning platform.

Option	Meaning
Learning contents	The *Go straight to learning contents* option allows users to open e-learning courses and videos right from the course preview. The course overview page does not have to be opened.
Enrollment	As soon as you check the *Show confirmation dialog box on enrollment* box, a text field appears. When a participant enrolls in a course, a dialog box appears with the text entered to this field. When going straight to the learning contents, this dialog box does not appear.

1. Confirm your changes with *Save*.

Result

The changes to the form are applied.

If you have set the course status to *Preview* or *Released* and enabled a visibility option, it can be accessed on the learning platform.

Create learning path

Information

You can combine multiple courses to form a learning path. A learning path can consist of all course types and contain different course types.

Requirement

You need all the courses you want to be part of the learning path.

Method

1. On the *New* tab, click *Learning > New course*.

2. Create a course with the *Learning path* course template.

3. Select the learning path.

   Optional: If the content of the learning path is shown, click *Form*.

   Learning paths are generally edited in the same way as described under Add course information.

4. Click the *Contents* tab.

5. Under *Included courses*, select the courses you want to be part of the learning path.

   The order in which you enter the courses does not have any effect on the order the courses have to be completed.

   To define a specific order, you have to edit the courses: For the included courses, enter the courses on the *Requirements* tab under *Required courses*. The learning path assumes the information from the individual courses.

6. On the *Settings* tab, set the visibility of the learning path under *Visibility*.

   > **Information**
   >
   > If you check the *Course can be found in the course catalog* box, it is shown on the learning platform under *Learning paths*, and not in the course catalog.

   You can set whether a course is only shown as part of the learning path, or as a separate course in the course catalog as well.

   - Only as part of the learning path: In the learning path, check the *Course can be found in the course catalog* box. Do not check this box for the course.
   - As part of the learning path and as a course in the course catalog: In the learning path, check the *Course can be found in the course catalog* box. Also check this box for the course.

7.

Confirm your changes with *Save*.

Result

The learning path is released on the learning platform and can be completed by participants.

Add course photos

Information

You can add photos for the learning platform to the course. You can configure two different pictures as the cover photo and the preview image. If you only configure a cover photo, this picture will also be used as the preview image.

Method

1. Select the course you want to add course photos to.

2. On the *Course* tab, click *Add course photos*.
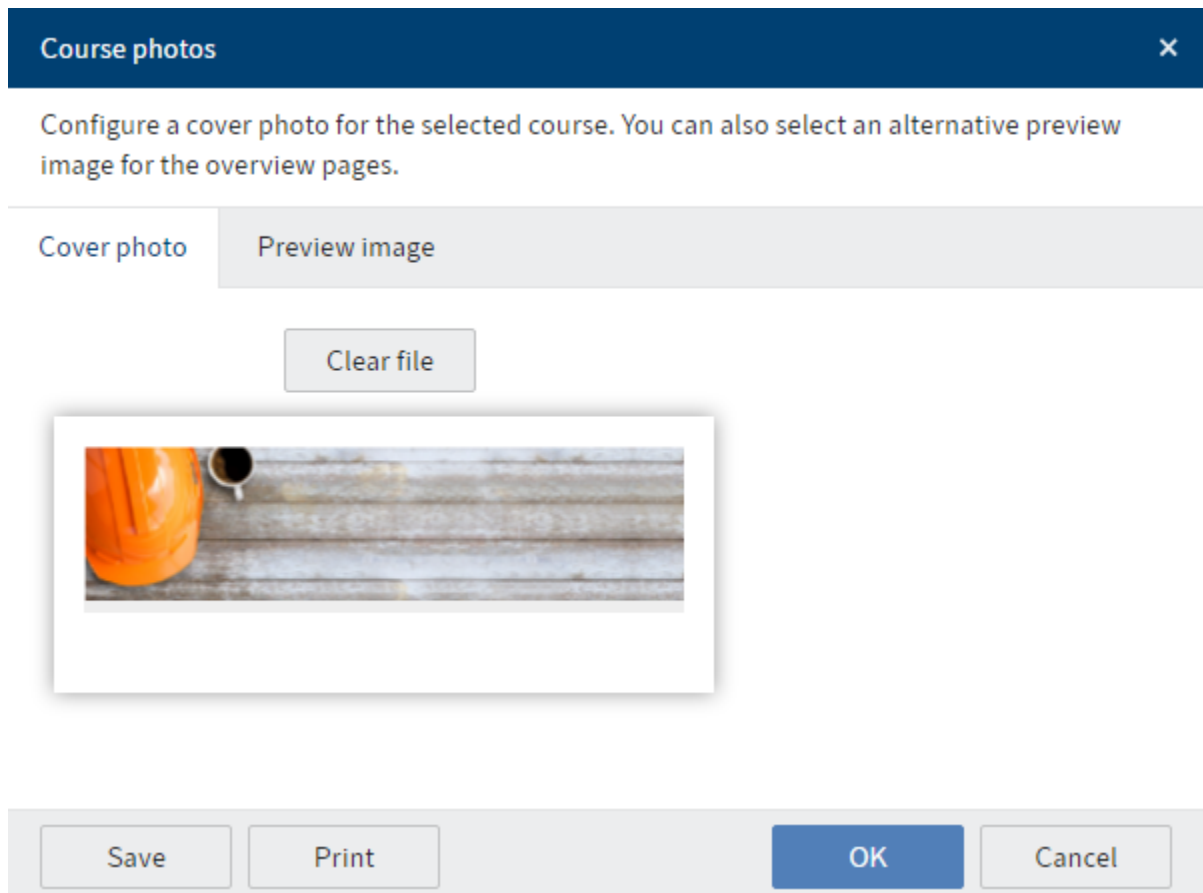
Fig.: 'Cover photo' dialog box

3. On the *Cover photo* tab, select a cover photo.

   Optional: On the *Preview image* tab, select an image for the course preview.

The following methods are available:

- *Select a file* button
- *Take a picture* button if a webcam is connected
- Drag-and-drop onto the gray rectangle (only in the ELO Web Client)

4.
   Click *OK*.

Result

The images are filed and shown on the learning platform as soon as the course has been released.

Create course material

Information

You can create course materials along with a course. The course materials are provided to participants on the learning platform for download.

When you create a course, it automatically contains the *Course materials* child folder. You can use this folder or create additional folders to structure your course materials. Each course material folder is shown on the learning platform as a tab.

Method: Create folder

1. Select the course folder you want to add a new folder to for course materials.

2. On the *New* tab, click *New folder*.

Fig.: 'New folder' dialog box

In the *New folder* dialog box, select the *Course materials* metadata form. Only folders created with the *Course materials* metadata form are shown on the learning platform.

3. Enter a short name. The tab on the learning platform is named based on the short name.

> **Information**
>
> You can change the short name later on. If you want to use the original *Course materials* folder with a different name, change the short name as follows:
>
> 1. Select the *Course materials* folder.
> 2. Press F4 or click *Organize > Metadata*.
> 3. Change the short name.

Course number and name: These two fields are completed automatically when the course is created.

4. Click *OK*.

Result: Create folder

The folder for course materials is created in the course folder.
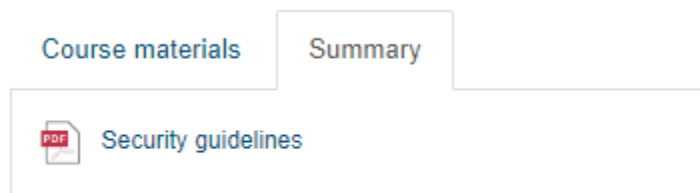
Fig.: Course materials on the learning platform

Outlook: Create folder

Course materials for the participants can be filed to the folder. A folder for course materials is only shown on the learning platform if it contains files.

Method: File course materials

1. Select the *Course materials* folder.

2. On the *New* tab, click *Insert > Insert file*.

3. Select the course materials from your file system.

    You have the following options:

    ◦ Select file: Click the button next to the *Select file...* field and select the file.
    ◦ Drop file here: Drag the file to the selected field and drop it there.
    ◦

Drag-and-drop: Drag the file to your client while the *Course materials* folder is selected.

Fig.: 'Insert file' dialog box

The *Course materials* metadata form is selected automatically.

Course number and name: These two fields are completed automatically during filing.

4. Click *OK*.

Result: File course materials

The course materials are filed to the selected folder.

Outlook: File course materials

Once the course is released, the participants can download the course materials from the learning platform.

Insert e-learning

Information

For a web-based training or video to be able to be shown on your learning platform, you will have to insert it in your course.

Requirement

An e-learning course was created using the New course function.

You have a web-based training that was created or purchased via an authoring tool.

Method

1. Select the course you want to upload a web-based training for. The file is created directly in the course folder and not in the *Course materials* folder. This folder is only intended for making additional files available to participants for download.

2. On the *New* tab, click *Insert > Insert file*.

Insert file	? ✕
Form	Occupational safety.zip
Course materials	Version	1
Course video	Version comment	
Web-based training	☐ Non-deletable version
	☐ Adjust document date (set to today)
	Basis	Course	Extra text	Options	Permissions
	Short name *	Occupational safety
	Date	08/03/2021 01:17
Filter	
	OK	Cancel

Fig.: 'Insert file' dialog box

3. In the *Insert file* dialog box, insert the web-based training.

   Alternative: Drag the file and drop it on the course folder.

4. Select the *Web-based training* metadata form. This metadata form contains the *Course* tab. The fields on this tab are blank and do not have to be completed. The fields are automatically completed with metadata from the course on filing.

5. Click *OK*.

Result

The web-based training is filed to the course.

Outlook

As soon as you release the course, it can be completed on the platform.

> **Information**
>
> You can edit a course even if it is already active. Simply upload a new version of the course in the same way. Make sure that no participants are working on the course at this time, i.e have the status *started*. Otherwise, the progress of course participants will be lost.

Insert video file

Information

You can embed video files in a course.

Requirement

A video course was created using the New course function.

You have a video file.

Method

1. Select the course you want to upload a video for.

2. Select the *Video* folder in the course folder.

3. On the *New* tab, click *Insert > Insert file*.

Fig.: 'Insert file' dialog box

4. In the *Insert file* dialog box, insert the video.

   Alternative: Drag the file and drop it on the *Video* folder.

5. Select the *Course video* metadata form. This metadata form contains the *Course* tab. The fields on this tab are blank and do not have to be completed. The fields are automatically completed with metadata from the course on filing.

6. Click *OK*.

Result

The video is filed to the course.

Outlook

As soon as you release the course, the video can be watched on the learning platform.

If you additionally enable the option *Course can be found in the course catalog*, the course will appear under the *Media library* tab on the learning platform.

For more information, refer to the chapter Add course information.

Embed YouTube or Vimeo video

Information

You can embed YouTube or Vimeo videos in a course.

Requirement

A video course was created using the New course function..

Method

1. Select the course you want to upload a video for.

2. Select the *Video* folder in the course folder.

   Create an entry in this folder. This is the easiest way to do so:

3. On the *New* tab, click *New folder*.

Fig.: 'New folder' dialog box

4. Click on the field *Video type*.
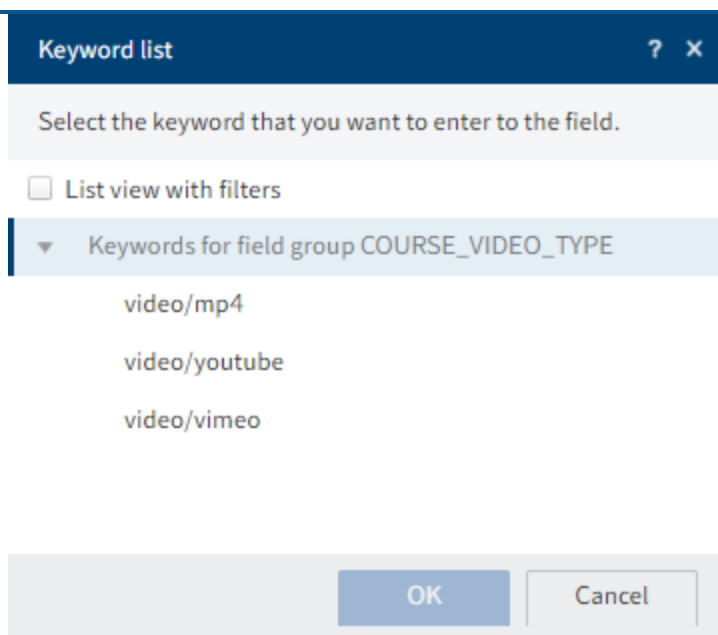
Fig.: 'Keyword list' dialog box

5. Select the corresponding video platform in the keyword list.

6. Click *OK*.

7. In the *New folder* dialog box, copy the URL of the video into the *Video URL* field.

8. Click *OK*.

Result

The video is stored in the course.

Outlook

As soon as you release the course, the video can be watched on the learning platform.

If you additionally enable the option *Course can be found in the course catalog*, the course will appear under the *Media library* tab on the learning platform.

For more information, refer to the chapter Add course information.

Sessions

Participants can either complete courses themselves or courses can be accompanied by instructors. If the participants complete the course themselves, only create the course with the relevant materials. If the participants are accompanied by an instructor, you will have to create sessions for the course.

This chapter addresses the following topics:

- Create session
- Edit session
- Close session

Create session

Information

For virtual classrooms and face-to-face training, create sessions within the course, which participants can enroll in.

Method

1. Select the course you want to add sessions to.

2. On the *Course* tab, click *Add sessions*.

Fig.: 'New sessions' dialog box

3. In the *New sessions* dialog box, complete the fields as required.

Field	Meaning
Session description	If you create sessions for a virtual classroom and use GoToWebinar, the session description is shown for all sessions in GoToWebinar.
Max. number of participants	If you restrict the number of participants for a session, only this number of participants can enroll via the learning platform. Using the *Course > Enroll participants* function, however, you can enroll more participants than indicated. When enrolling in an session, users can see how many places there are in total and how many are still available.
Add session	Clicking this button creates a duplicate of the bottom session in the list. If you have already entered information for the session, this information will be applied. You then only have to change the date if the other information is identical.

4. Click *OK*.

Result

The sessions are created within the course. The new sessions are shown in the course as soon as you refresh the client (*View > Refresh* or F5).

Outlook

Once you have created a session, you can enter additional information in the form. Select the session and click the *Form* tab.

You can enter a different instructor and location for each session. If all sessions will be carried out by the same instructor, you only have to enter them once in the course form.

The participants are created within a session. They can either enroll themselves on the learning platform, or they are enrolled via Enroll participants.

If you have created a session for GoToWebinar, the instructor has to receive an invitation in GoToWebinar via the *+ Panelists* button.

Edit session

Information

When creating a session, only certain information has to be entered right away. You can add more or change this information later.

Method

1. Select the session you want to add information for.
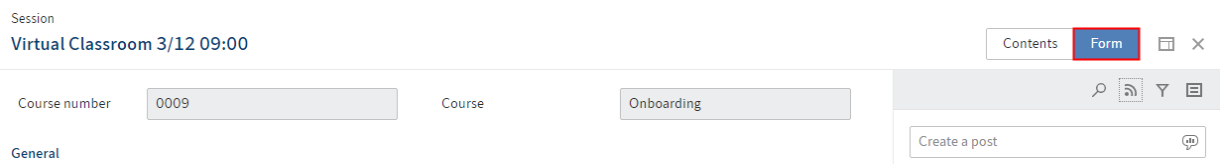
Fig.: 'Form' button

Optional: If the content of the session is shown, click *Form*.

2. Change or complete the fields as required.

Field	Meaning
Instructor	Enter an instructor if the individual sessions will be carried out by different instructors. If all sessions will be carried out by the same instructor, enter them in the course form. If you enter an instructor, they are given access to the course and can create course materials and course contents.

3. Confirm your changes with *Save*.

Result

The changes to the form are applied.

Close session

Information

Once a session has been carried out, you can automatically create certificates for the participants. Close the session. You can choose which participants receive a certificate.

Method

1. Select the session you want to close.

2. On the *Course* tab, click *Close session*.

Fig.: 'Close session' dialog box

3. In the *Close session* dialog box, check the box next to all participants you want to confirm participated in the session.

4. Click *OK*.

Result

A certificate is issued for the selected participants. The certificate is filed to the *Certificates* folder as a PDF document.

Outlook

If participants have not received a certificate and have to take the course again, you have to unenroll them from the course using the Cancel enrollment function. Participants can only enroll or be enrolled in another session once they have been unenrolled from the course.

Participants

On the learning platform, participants can enroll in a course or session. Alternatively, you can also enroll participants in courses.

If users are enrolled in courses, they are created within the course in the *Enrollments* folder. The *Enrollments* folder may be located right in the course folder or, if the course has sessions, in the folder for the respective session.

Upon successful completion of a course, certificates can be issued automatically for participants.

This chapter addresses the following topics:

- Enroll participants
- Cancel enrollment
- Send message
- Create certificate

Enroll participants

Information

Participants can either enroll themselves in courses or sessions on the learning platform, or you can enroll them. This section describes how to enroll participants.

Method

1. Select the course or session you want to enroll participants in.

2. On the *Course* tab, click *Enroll participants*.

Fig.: 'New participants' dialog box

3. In the *New participants* dialog box, click *Add participant*.
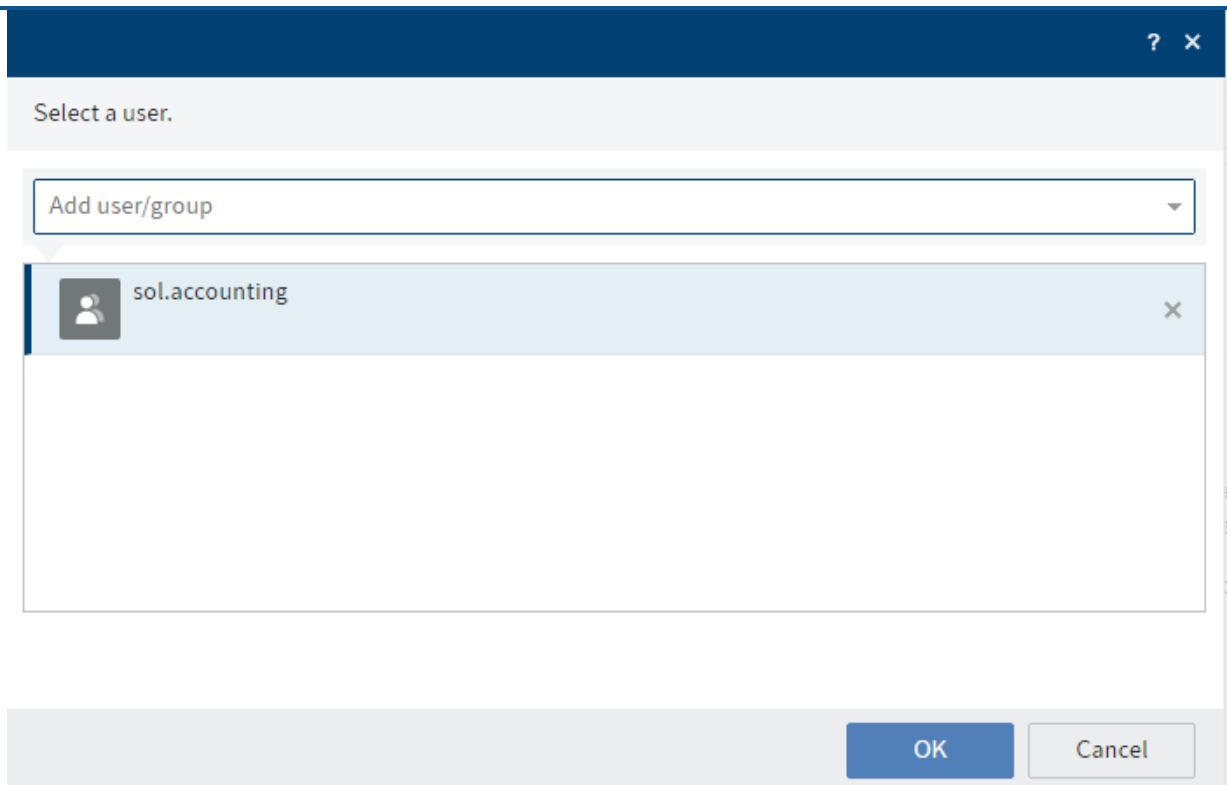
Fig.: Select participants

4. In the dialog box that opens, select the participants. You can select groups or individual users.

   If you would like to add a number of participants to a group, but not all of them, we recommend taking the following approach: Select the group and confirm your selection. The participants in the group are shown in the *New participants* dialog box. You can remove specific participants by clicking the X icon.

5. Click *OK*.

Result

The participants are created within the course folder or session folder. The newly enrolled participants are shown in the course as soon as you refresh the client (*View > Refresh* or F5).

Outlook

If a participant is enrolled, they can participate in the course and receive a certificate once they have completed it. The certificate is created automatically when the participant has completed an e-learning or video, or when you close the session using the Close session function.

If a participant would like to unenroll from a course, they can do so themselves on the learning platform. Alternatively, you can unenroll participants using the Cancel enrollment function, for example if a participant does not show up to a face-to-face training.

Cancel enrollment

Information

If a participant would like to unenroll from a course, they can do so themselves on the learning platform. Alternatively, you can unenroll participants, for example if a participant does not show up to a face-to-face training.

Method

1. Select the session you want to unenroll participants from.

2. On the *Course* tab, click *Cancel enrollment*.

Fig.: 'Cancel enrollment' dialog box

3.

In the *Cancel enrollment* dialog box, check the box next to all participants you want to remove from the session.

4. Click *OK*.

Result

The participants are unenrolled from the session. The changes are shown in the course as soon as you refresh the client (*View > Refresh* or F5).

Send message

Information

You can send enrolled course participants a message requesting information or containing information. If an e-mail has been entered for the participant, the message will automatically be sent to this address.

Method

1. Select the participant you want to send a message to.

2. On the *Enrollment* tab, click *Send message*.

Create a message ✕

Send a message by e-mail

E-mail

Sender *   Charlotte Bennett

Recipient *   d.cooper@contelo.com

Subject *   Your participation in "ELO Contract

| <> | ¶ | **B** | *I* | S̶ | ☰ | ⌘ | ▤ |

Hello,

Best regards,

Charlotte Bennett

| Save | Print | | OK | Cancel |

Fig.: 'Create a message' dialog box

The *Create a message* dialog box already contains the sender, recipient (if e-mail address was provided), and a subject.

3. Enter text. You can format this text as needed.

| <> | ¶ | **B** | *I* | S̶ | ☰ | ⌘ | ▤ |

Fig.: 'Clips' button

Field Meaning

Clips are text blocks that help you create your text. They contain information on the
Clips   course and participant and can be inserted into the text. To use them, select the
position in the text where you want to insert information and click *Clips*.

Fig.: Configured clips

4. Click *OK*.

Result

The e-mail is sent to the participants.

Create certificate

Information

Certificates can be created in different ways.

- If a participant completes an e-learning course or video, a certificate is created
  automatically.
- For courses with sessions, certificates are created when the session has been closed with the
  Close session function.
- Certificates can also be created separately.

Method

1. Select the participant you want to create a certificate for.

2. On the *Enrollment* tab, click *Create certificate*.

Result

The certificate is filed to the participant's folder within the course as well as the *Certificates* folder.

Dashboard overview

The dashboard offers different views of available courses and participants.

You can reach the dashboard by clicking the *Courses and participants* tile in the *My ELO* area.

The dashboard remembers your settings. When you close then open the dashboard again, it remembers and displays your most recent view.

Course view

When you open the dashboard, you will see the course view. This view gives you an overview of the available courses.

Fig.: Course view in the dashboard

The dashboard is divided into the following areas:

1 Database: In the dashboard header, use the drop-down menu (arrow icon) to select a database. A dashboard database is a list of courses that is loaded for evaluation.

> **Information**
>
> If there is only one database, this database is selected permanently and no drop-down menu is available.

2 Search: You can search for text values and number values. All data that you can select as column values in the course view serves as the basis.

3 Course types: The dashboard header contains a button for each course type. If a button is active, all courses of the corresponding type are shown in the dashboard viewer pane.

4 Viewer pane: In the dashboard viewer pane, you will see a list of courses. This list changes depending on the filter criteria applied.

Customize the view using the drop-down menus.

Fig.: Customize view

The drop-down menus in the column headings contain the following functions:

- Sort ascending
- Sort descending
- Remove sorting

Alternative: You can sort the column by clicking the column heading. Clicking once sorts in ascending order. Clicking a second time sorts the items in descending order. Clicking a third time clears sorting.

- Hide column: The column can be shown again via the menu.
- Group: The content of a column is joined into groups. The number of entries in each group is shown in brackets. Click the plus icon before the group to expand it and view all contained entries. The minus icon minimizes it again. Clicking the plus icon in the header expands all groups.

> **Information**
>
> You can combine multiple groups. You can specify a hierarchy with the order in which you select the columns.

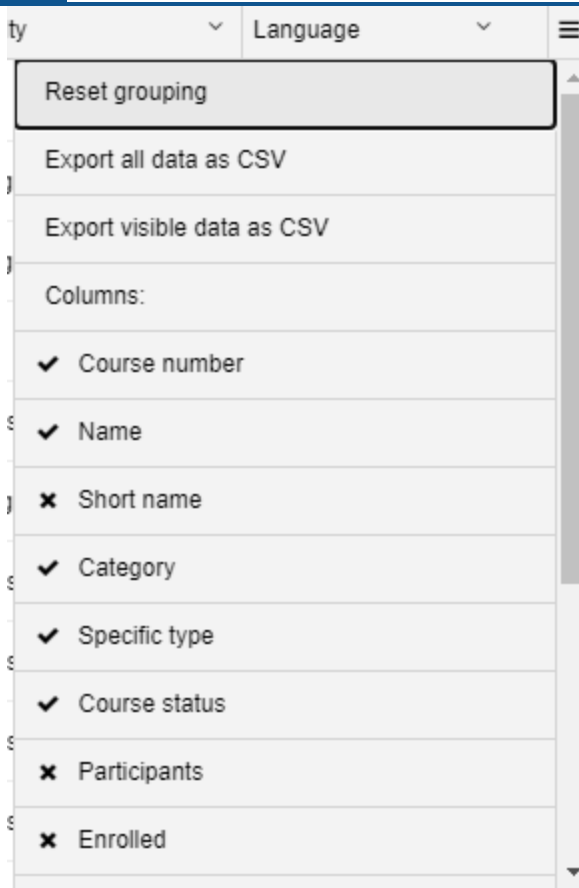- Ungroup: This option appears if you have grouped items.

Fig.: Menu

Menu: By clicking the button with the three lines, you can show hidden columns. Clicking the *Reset grouping* button resets all groups. You can create a CSV file for analysis using the *Export all data as CSV* and *Export visible data as CSV* buttons. This file appears at the bottom left of your window.
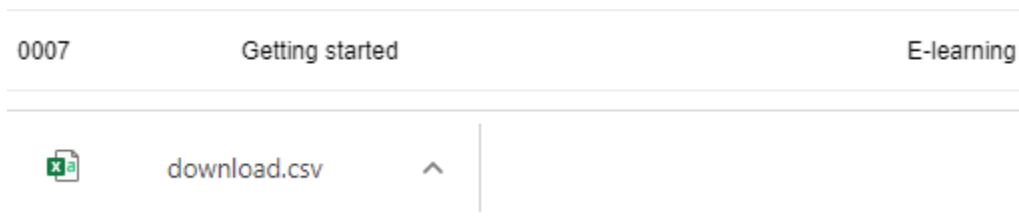

Fig.: CSV file

Participant view

Clicking a course brings you to the dashboard participant view.

Fig.: Participant view in the dashboard

1 Courses/Participants: Clicking an entry opens the entry in the viewer pane. In the overview of participants, participants are listed multiple times if they have been added to different courses.

2 Viewer pane: Clicking an entry shows a preview of the entry. Double-clicking an entry brings you to the *Repository* work area. The values in the *Participant status* column contain drop-down menus, which allow you to change the participant status.

Learning platform

On the learning platform, you release courses that you have already created.

You can reach the learning platform either via the URL or the *Courses and seminars* tile in *My ELO*.

Participants can enroll in released courses via the learning platform.

Participants can also complete e-learning and video courses right on the learning platform and view their certificates.
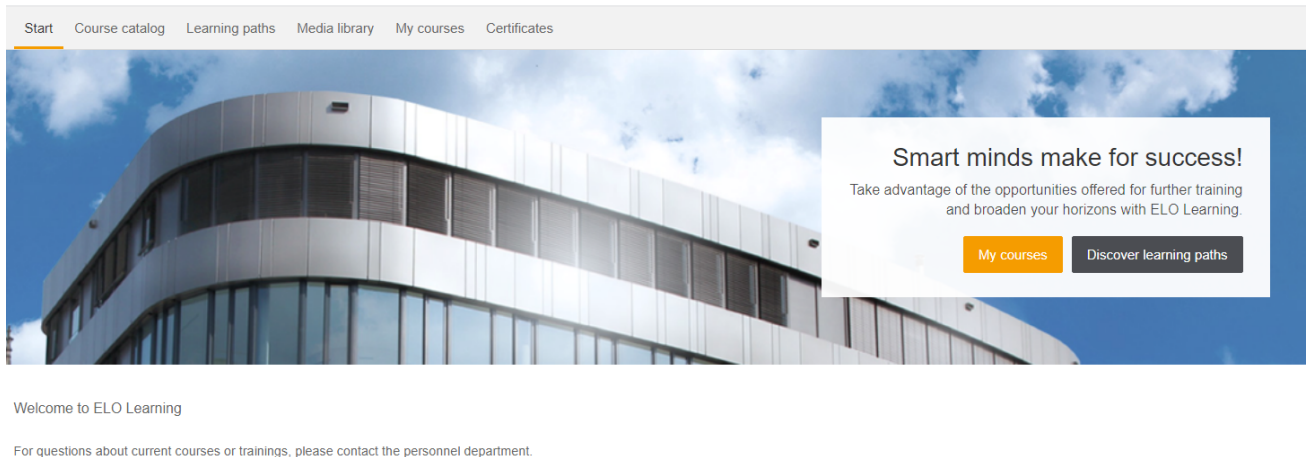

Fig.: Learning platform start screen

The learning platform consists of the following areas:

- Start
- Course catalog
- Learning paths
- Media library
- My courses
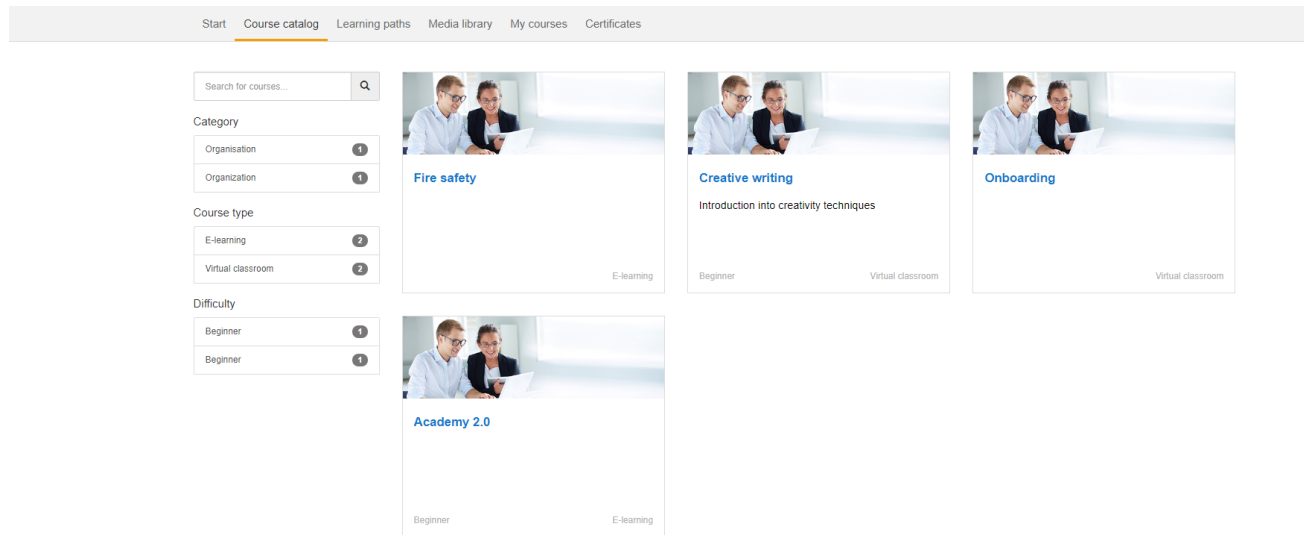- Certificates

'Course catalog' tab

Fig.: 'Course catalog' tab

The created courses are on the *Course catalog* tab. This does not apply to *Learning path* and *Video* type courses, which are found on the *Learning path*/*Media library* tab respectively.

Users can search for specific courses using the sidebar.

Clicking a course takes the user to the selected course with a detailed description, as well as an option to select a session or begin the course.