



# LMS Vendor

Demonstrations & Questions



## General Questions

The below section are *basic needs* of the LMS. This is not a complete list of all functions, but a high-level overview of basic requirements. The full detailed list of requirements can be found here (Insert link).

**Please describe in detail the following (these can be written responses):**

1. Please demonstrate how a user would locate a course or search the learning catalog.
  - a. Can the user search live training from this search area?
  - b. Can this search be used on the main dashboard/homepage?
2. Can the system be partitioned to different groups? Different learning experience depending on role.
  - a. Internal vs. External (we have staff and external partner learning)
  - b. Volunteers
  - c. Trustees/Global Board
  - d. Manager/Staff
3. What is the system integration like with the following:
  - a. Is the LMS integrated with MS Teams, if so, please demonstrate
    - i. If the system can integrate, what do we need to do to set that up on our end?
  - b. Is there a deep integration with LinkedIn Learning if so, please demonstrate how that would look and the process of how the system is integrated, is this manual?
  - c. Can the LMS integrate with Sharepoint?
  - d. Any integration with O'Reilly? eCornell? CEGOS (SCORM dispatch)?
  - e. Are there any other systems this LMS can integrate with seamlessly?
  - f. If the LMS is not integrated, can learning records be uploaded via manual or automated process?
  - g. Do you offer API for integration?
  - h. Any integration with ZOOM or Teams meetings?
4. Please example what kinds of files can be loaded into the system.
  - a. SCORM, what versions are supported?
  - b. Does video need to be streamed from a 3<sup>rd</sup> party website or can the system stream directly?
  - c. PDF, DOC, External Links, Embedded content
5. Can the system use Machine/User Learning to serve recommendations of other courses? If so, please demonstrate and show the algorithm that populates this content.
6. Does the system offer a certification? Uploading customer certificates or are the certificates system standard?
7. What languages can the LMS understand and present in?
  - a. We would need: English, Spanish, Portuguese, Indonesian, Chinese, French, and Swahili

8. Is there a way users can rate a course and this course could be pulled into a top 10 type list? Please demonstrate how that would work.
9. Can the LMS track learning hours or credits? Please demonstrate how that would look and how the user could track those credits at the individual transcript level.
10. Is there any social components to the LMS? Wikis? Leaderboards? Blogs? Chats? Workspaces? Channels?
11. Does the LMS have an app or mobile friendly version? Is this available in all countries (China)?
12. Is the LMS customizable? How so, please demonstrate.
13. Are there plugin or additional features that can be added to the LMS?
14. Can different levels of access be granted across the LMS?
15. Does the system offer comprehensive reporting? Auto reports?
16. Does the system offer a SSO login option?
17. How does the notification system work? Is this at the course level or only system level? Can it be easily modified? Can programs have their own notifications?
18. Is there a built-in authoring tool? If so, is there documentation on how to use it and can an example be shown?

## Scenarios for Demo

### Scenario 1: Searching and enrolling into courses and learning resources

Demonstrate the user experience of searching and enrolling into training.

#### **Tasks:**

1. Using the search engine, type in key words for different learning assets
2. Filter results by learning types (i.e. language, format, vendor)
3. Can learning on demand/resources be located and how does that appear in the search results
4. Demonstrate the process of enrolling into a self-paced course along with live, instructor led training

#### **Additional Questions:**

How is 3<sup>rd</sup> party learning handled in the search? Is the search alphabetical or can it be relevant? Can the search be narrowed down by recommendations or specific job roles?

## Scenario 2: Creating an instructor led course in the system

Demonstrate how to create an instructor led courses on the back end for system administrators, how to edit existing courses, and update, and provide permissions for teachers/trainers.

### **Tasks:**

1. Set up a virtual instructor led course
2. Demonstrate permissions on allowing users to both self-enroll and how learner registration would use an approval process
3. Show how pre-work would look in the course room along with how those items are tracked
4. Show how the learner would upload any pre-work assignment
5. Demonstrate the notification systems and how to edit those
6. Show how course grades/attendance are completed
7. Show how to assign an instructor to the course and what roles/permissions they have
8. Show how the learner would receive notification and calendar invite
9. Show how the course would look on their transcripts once completed
10. Demonstrate at the site level where the live training calendar lives and if users can sign up/enroll from that page
11. Show if/how the learner would attend the live web training, LMS web-conferencing integration
12. Demonstrate how to hide the course from different groups and show to others

### **Additional Questions:**

Can attendance be done through ZOOM/Team automatically? If so, what is the process to get that set up? Can we set up courses to require a manager's approval prior to enrollment? Can an enrollment key be set up on a course? Time zone appearance for live training, how is this set?

## Scenario 3: Compliance or All Staff training and Programs/Curriculum

Demonstrate how to create an all-staff training program/curriculum.

**Tasks:**

1. Show how a curriculum could be built for compliance training with several lessons and activities
2. Show how to upload SCORM, embed a video, PDF, add a graded assignment, wiki, survey, and chats
3. Show how to set up dependencies in the course, or unlocking items
4. Demonstrate how learners are enrolled
5. Show how to create notifications and reminders
6. Demonstrate how the reporting would look for managers and designated HR partners
7. Show how users would select their preferred language when auto enrolled into an all-staff compliance training
8. Show how the course room would look in different languages
9. Show how the system handles credits assigned to compliance training or time allocations
10. Demonstrate how to replace/update SCORM packages and if any data would be lost in the process
11. Show how the course would look on their transcripts once completed

**Additional Questions:**

Would a certification work best in this situation? If so, how would that look? How are students notified when they are out of compliance? Can a student remove themselves from a certification (i.e. Youth Safety)? Can a learner enroll into a certification? Can we add a badge to a compliance training? Is there a max size for uploads?

## Scenario 4: Manager viewing staff training

Demonstrate how a manager could view their employees training.

**Tasks:**

1. Show how the manager would view the teams' transcripts
2. Show how a manager can assign training and a learning path to their team
3. Show how a manager can suggest learning but not enroll them
4. Demonstrate how a manager could pull a report

**Additional Questions:**

Can learning paths be created at both the individual level AND manager? Can learning paths be shared? If so, how? Can training be recommended from learner to learner?

## Scenario 5: User profile

Demonstrate how a user can upload their own certificates or external training into their training transcript and update their profile.

### Tasks:

1. Upload and/or create custom content
2. Show how a user could upload a license, certificate, conference, or external training certificate
3. Show how a user would update their time zone or does this happen automatically
4. Show how a user would edit their profile and what fields they are able to edit

### Additional Questions:

Does the content need to be in a particular format?

## Scenario 6: Assessments and Survey options

Demonstrate how the internal assessment option works. Is there a survey for end of course data collection? Can we do a questionnaire in courses?

### Tasks:

1. Create an assessment with several different question types, explain each
2. Show if the questions could be randomized for unique quizzing
3. Show internal reporting on quiz/assessment questions and results

## Scenario 7: Bulk user management

Demonstrate how an admin would bulk enroll users groups and completion.

### Tasks:

1. Demonstrate how the bulk function works
2. Show how bulk enrollment could be used to update grades or enrollments into courses
3. Demonstrate how the bulk function could be used for enrolling users into a group/cohort or audience
4. Demonstrate how to bulk upload external completions (i.e. eCornell)

### Additional Questions:

Is there a place to get the CSV template file for bulk actions?

## Scenario 8: Competencies and or Skills in the system

Demonstrate how the system handles competencies and skills in the LMS.

### **Tasks:**

1. Demonstrate the competency/skill features the system has
2. Show how competencies/skills are reported on
3. Show how competencies/skills are updated based on training completed

### **Additional Questions:**

Can competencies be based on role in the organization? How would a user update their skills, is there a manager approval to that?

## Scenario 9: System Admin & Reporting

Demonstrate how the system works on the admin side.

### **Tasks:**

1. Show how admins would login
2. Show the file/catalog structure and how content/courses are organized on the backend
3. Demonstrate how an admin would manage and update user accounts
4. Show how the system settings are set up and where to locate them
5. Demonstrate how an admin would manage and maintain courses in the catalog
6. Show the best way to archive courses that are no longer in use
7. Show the reporting features and how they can be customized
8. Show how auto reports can be generated
9. Demonstrate how certain reports can be set up for different HR partners
10. Show any reporting dashboard that might help visualize learning data

### **Additional Questions:**

How often typically is the system upgraded? Would there be a DEV site for testing? What level of admin access would we get? Would we get any formal training on the system prior?

## Additional Items to consider

### **Cost**

What is the pricing model?

### **Support**

What kind of support would we receive? How quickly are tickets handled? Is their professional training from the vendor to the team? What does that training look like? Are upgrade trainings offered?

### **HR Integration**

Will this system be able to integrate with Workday and/or Peoplesoft? What systems CAN the LMS be integrated with? What is the process? Does custom code and reports need to be created or is there a plug-in?

### **External account creation/Multi Tenancy**

Does the system allow for multi tenancy and external account creation? Is this easily partitioned for internal vs. external users?

### **Training Time Calculations**

Can and how does the system calculate training time or credits? This could be used for manager training that have 14 hours required training and provide an ability to track that training through lessons completed. This should also roll up to a dashboard or report for senior managers and BU to view.

### **Offline learning/multi devices**

Does the system offer offline learning, how would that work for remote areas? Can training be started on a desktop and move over to a phone? What if the phone loses coverage, is the data stored until the learner is in a service area?

### **Gamification**

Leaderboards, badging and awards. Is it possible to “earn” credits for training? Is this something we want to promote?

### **System to System transfer**

How compatible are the systems to have data transferred from our current LMS to the new one. Any additional resources or cost associated with a 3<sup>rd</sup> party to help with the process? How long typically does this process take for a system of our size? Should this be done in phases or all at once?