ThatPreparation & Planning		
	Action Plans	**Comments and Key Indicators**
1. ***Administration.*** Who will be managing the product within your organization?		
a. Learning Administrator(s)	☐	The Learning Administrator is the main contact who coordinates the program rollout and training at the facility. We recommend you establish at least one administrator and at least one back up administrator. Your Implementation Manager will provide some useful guidelines for identifying administrator roles and responsibilities.
b. Human Resources Contact	☐	You will need to load user credentials (name userID, password, job code, department, facility, and job title information) so users can complete learning assignments. You may need to involve an HR contact to help you obtain that information as an Excel file extract. *(see more information in the section regarding HR import)*
c. Information Technology (IT) Contact	☐	You may need to check with your system security officer or other IT contact to determine if there are any firewall considerations/settings necessary for you to access our product through the web portal. For example, they may need to know the IP addresses for our applications or the domain names associated with our URLs so they can list them in their security system as approved sites for you to access.
2. ***Organizational Objectives.*** What are your learning objectives for the next 90 days?		
a. Objectives	☐	There is much more on the system than you will be able to learn all at once. Set realistic objectives that you can measure and celebrate your success. Your Implementation Manager will provide some tips for success.
b. Measures for Success	☐	Once you determine your objectives, you will want to define how you will measure your accomplishments. Take some time now to think about how you will measure your first 90 days' success, and then beyond that, how will you continue to show improved progress, or measure new goals?
3. ***Facility/Department Structure.*** How do you want users, administration, and reporting to be organized?		
a. Facilities/Departments	☐	The system supports a hierarchy of Facilities and Departments in order to manage users and reporting. Consider carefully the reporting you want from the system and whether the need is for centralized or de-centralized administration.
4. ***Access.*** How do you want users to log into the system?		
a. Remote access	☐	Allows users to access their learning from their home or other remote location. Remote access requires user IDs and passwords for system access.
b. User credentials	☐	Maintenance of user IDs is easiest through manual updates.
5. ***HR Import.***		

ThatPreparation & Planning		
	Action Plans	Comments and Key Indicators
a. Submit HR file of users/ learners	☐	The HR import is used to add employees, departments, job codes and other information for large numbers of employees. Your Implementation Manager will provide an HR Import document Template if needed.
6. ***Other Functionality.*** What other system functionality do you plan to use during the first 90 days?		
a. System Configuration	☐	There are some global system configuration settings that your Implementation Manager will review with you during the Implementation planning call. Settings include things like providing email notifications, letting users update their email addresses, etc. These may be pre-determined for state-wide contracts.
b. Announcements	☐	Announcements allow you to communicate with your users across the organization, or with selected individuals on any subject. Announcements may be scheduled ahead of time, and may require an acknowledgement that is recorded in the user's transcript. This is a valuable feature for communicating to your users, and we highly suggest that you utilize this feature.
c. Discussions	☐	Discussions allow you to document collaboration, share information for informal learning, or grade open ended questions. Customers use this for process improvement, committee discussions, or extensions of classroom training for staff to document what learning is actually used in the workplace.
d. Content Linking & Assessments	☐	Create your own lessons and tests using the Content Linking functionality. Create tests for the lessons, or use assessments with automatic remedial training to deliver focused training programs.
e. OnTrack	☐	Keep track of certifications and license renewals, or outside training accomplishments. OnTrack items can be 'assigned' and 'completed' so that these supplemental activities appear in the transcript.
f. Classes & Events	☐	Manage in person training and other staff events. Event enrollment is done separately from the module assignment process for online learning. You may want to launch your online learning first, gain some success, and then begin to use events manager.
g. Knowledge Manager	☐	Create and manage competency checklists for procedural competencies, on-boarding tasks, action plans, etc.
h. Survey	☐	Get feedback from your users, collect required demographic and professional information, and generally stay in touch with your users.

Setup & Access		
	Action Plans	**Comments and Key Indicators**
7. ***Administrative Permissions.*** Who else has administrative permissions and which permissions are they granted?		
a. Administrative Permissions	☐	The system provides various permissions that can be assigned to users in order to manage and report your program activity. A best practice is to review these permissions early as you make your configuration decisions. Your Implementation Manager should review the permissions within the system so that you can decide what privileges to give your team members. You will be responsible for supporting any team members that you have provided with administrative privileges to the learning management system.
8. ***Content Linking.*** Do you plan to load your own lessons?		
a. Yes	☐	The LMS provides a self-service tool to load your own lessons built from PowerPoint, PDF, Flash, or other productivity tools. Due to their more complex file structures, SCORM lessons need to be placed on an FTP site for Elsevier Technical Services to post.
b. No	☐	
9. ***HR Import.*** Obtain Import File from HR System.		
a. Submit one time HR file of users/ learners	☐	The one time HR import can be used to add employees, departments, job codes and other information.
10. ***Training.***		
a. Learning Administrator	☐	*Approximately 1-1.5 hours, via phone & internet*. You will also receive WebEx sessions covering the initial training topics after the training is completed for review. Your Implementation Manager will add you to the distribution list for the monthly training schedule.
b. Other Administrators	☐	You can share the monthly training schedule for on-going with your other administrators. These sessions will how to create and assign tasks, monitor progress, run reports, view transcripts, etc.
c. End users/Learners	N/A	Learning administrators are responsible for instructing end users. The system is fairly intuitive, and you may just need an email to everyone with general instructions. Many of the launch ideas in the Program Launch section will help you communicate with your end users.

PROGRAM LAUNCH		
	Action Plans	**Comments and Key Indicators**
11. ***Internal Rollout.*** How do you plan to inform users about this new program?		
a. Awareness Poster	☐	Inform staff, when it's time, about the availability of online education, create posters that can be displayed in primary communication areas. Visuals make a difference.
b. Awareness Emails	☐	Create emails that inform employees about the value of this program and let them know expectations. Establish periodic communications to keep them informed.
c. Newsletter Tools	☐	Consider Employee newsletters as a powerful way to let your staff know about the availability of this new resource.
d. Department Challenges/ Competition Lessons	☐	Use interactive challenges and contests to encourage participation in the early rollout.

***NOTES**: Below are questions and considerations that have largely been summarized and incorporated into the Implementation Decisions document above.*

Once an organization decides to access an LMS, there are a number of things to examine and consider in order to make the access successful and cost effective.

1. Organizational Goals
    a. Why use an LMS?
        a. Utilize access to eLearning
        b. Provide in-house flip chart, PowerPoint, or other training by computer
        c. Track instructor led classroom training
        d. Track license certifications
        e. Need to maximize use of available staff resources
        f. Reduce organizational overhead
2. Does the organization have the computer resources available?
3. Who will have initial access?
    a. New hires only
    b. Supervisory staff only?
    c. Tenured staff only?
    d. Board members?
4. Who will act as the 'Learning Administrator'?
    a. This must be someone who is very organized and works in a timely manner.
    b. This should be someone comfortable using computers and the internet.
    c. This person should have at least two hours a day to devote to learning the LMS and administering it for the first 2-4 months. Once operational and being used actively within the organization, a minimum of 2-4 hours per week would be required depending upon organizational size.
    d. This should be someone readily accessible to learners throughout the work day.
    e. This should be someone who can make decisions around creating lesson plans, and assigning lesson plans.
    f. This should be someone with approved access to employee HR records.
5. Who will act as the 'backup' to the Learning Administrator?
6. What is the timeframe for introduction to staff?
    a. Are there specific mandates that must be met?
7. Is there a specific part of the LMS that is the primary focus?
    a. E-Learning
    b. Classroom training
    c. Licensure tracking
8. How will you introduce the new system to your learners?
    a. Will you incentivize learners to use the system in some way?
        i. Career ladder
        ii. Extra day off, etc.
9. Do you have staff that work at more than one organization within your state?
    a. Manager Zone will assist with access to those learner records
        i. No learner should have more than one Learner ID/Access Code/User ID
10. How will you enroll your learners?
    a. Manually

b. Using assistance from the LMS provider's data team

Summary: This lesson has covered a number of considerations to be addressed once an organization decides to use an LMS. It's important to make decisions around the use of an LMS prior to implementing the use of it in order to ensure success for the organization.