Seven Things You Should Automate in an LMS

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Adobe
Captivate Prime LMS

THE ELEARNING GUILD

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INTRODUCTION

Learning management systems have come a long way! The primary function of the LMS used to be the handling of administrative tasks associated with delivering compliance training. Companies took notice because the systems enabled them to save time and prevent costly errors. Over the years, learning management systems have become more sophisticated, with vendors adding dozens of other useful tools. The plethora of automation features available in learning management systems today provide a host of benefits that can greatly improve the LMS experience for everyone, from executives and managers to system administrators and learners.

Seven things you should automate in an LMS

There are many features that can be automated in a learning management system. Seven of the most important are:

- Synchronization of the employee database with the LMS
- Creation of user groups
- Enrollment in learning plans
- Recommendation of courses
- Scheduling of reports to management
- Notification to learners of course completion
- Recurring certificates

This paper will cover each of these subjects in greater detail.

Synchronization of the employee database with the LMS

Experts agree that automatic synchronization of a company's employee database with the learning management system is absolutely essential to delivering appropriate training to all staff members, as well as maintaining accurate records regarding course completion.

The employee database is designed to track an individual worker throughout his or her career with the company. A unique profile is generated for each employee. These profiles are purposely fluid. As individuals

Practical tips when configuring an LMS

A huge misconception is that a new learning management system will effortlessly automate everything by itself. The reality is that one cannot "plug and play" a system that has not been configured to understand an organization's unique context, rules, data, workflow, and processes. The result of such thinking is an automated mess!

Here are some practical tips to keep in mind when configuring a new LMS:

- Each learner account in the system must contain information that categorizes them by job title, department, team or unit, job type, manager's name, and other specific criteria relevant to the organization. The good news is that the human resource department has already done most of the legwork by entering employees in the corporate human resource information system (HRIS). Instead of devoting hours to re-creating the categories from scratch, L&D professionals should take advantage of the HRIS when setting up the LMS.
- Integrating the pre-existing data from the company HRIS offers numerous benefits. On a practical level, it makes it simple for L&D professionals to isolate and identify specific training courses for targeted members of the staff, such as nurses, members of the finance department, or executives. However, the practice also enables L&D to incorporate a standardized nomenclature that is already accepted in the workplace. The LMS then becomes a valuable and integrated part of the corporate ecosystem, as opposed to a stand-alone system.
- Keep the system current by routinely feeding HRIS information to the LMS. When armed with accurate data, L&D professionals can quickly pivot to address new fluctuations as staff members' jobs shift or they migrate to different departments. They can easily assign specific courses that will help workers in their new roles, or modify existing learning plans.
- If the original HRIS data is disorganized or inaccurate, L&D could potentially inherit unwanted problems. To avoid such issues, carefully examine and evaluate the data before incorporating it into the LMS.

switch jobs or departments, the human resource department will update their profiles accordingly.

It is important to note that synchronization and integration of the employee database and LMS can take place even when the systems are from two different vendors. The synchronization schedule can be preset to any time frame, such as twice daily, nightly, weekly, etc. Experts agree that a once-per-day feed is usually sufficient, and scheduling it at night is preferable to avoid any potential drains on LMS performance.

The training department benefits when HR updates are seamlessly synced to the LMS, because the information learners see or can access when they log in to the system is automatically altered to reflect their new status. For example, if a learner is promoted to a line manager position, the new subordinates she would be assigned to manage would automatically become visible to her from a content assignment, reporting, and other management function standpoint.

When configuring a new LMS, a best practice for L&D professionals is to coordinate with the HR technical team in order to decide exactly which data should be synced. Experts recommend confining it to information specifically related to learning needs. For example: A worker's pay grade is probably irrelevant to his or her training, so salary data records would not need to be included. Vital fields for synchronization will vary, depending on the specific needs of each company. The following table illustrates some of the more common fields that are usually synced, along with the reason(s) why.

Field Name	Sample Text	Why Is It Useful?
First Name	Janice	
Last Name	Doe	
Preferred Name	Jan	Learners might want a preferred name or nickname to appear in the LMS user interface, and on all automatically generated completion certificates or transcripts.
Employee ID	123456	
Email Address	DoeJ@work.com	This is where LMS notifications should be sent.
Manager's Employee ID	654321	This field ties the learner to a manager and helps automate manager groups. It can also inform who has manager privileges to track this learner and assign them specific courses.
Manager's Email Address	BossJ@work.com	This can be used to send LMS notifications to the manager about the learner's training, progress, etc.

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Field Name	Sample Text	Why Is It Useful?
Department Code	123	
Department Name	Finance	This is a potential automated grouping. The LMS can be set to find anyone within a department in order to assign them specific courses or learning plans.
Unit Code	12	
Unit Name	Payroll	This is a potential automated grouping. The LMS can be set to find anyone within a particular unit in order to assign them specific courses or learning plans.
Job Code	4567	
Job Title	Financial Analyst	This is a potential automated grouping. The LMS can be set to find anyone with a particular job title in order to assign them specific courses or learning plans.
Hire Date	1998/01/24	Mandatory training can be assigned based on the employee's hire date. The time period the learner has to complete the training can also be automatically assigned.
Termination Date		This field should remain empty as long as an individual is employed. When a date is entered, the LMS account can be configured to automatically deactivate. This is particularly important when the organization is paying license fees per active user.
Employee Status	Active	This field can be populated with the terms Active, On Leave, or Terminated. At many firms, employees designated On Leave because of maternity, sabbatical, long-term, or short-term disability lose access to the LMS.
Work Type	Full Time	This field can be populated with the terms Full Time, Part Time, or Temporary. Certain courses may be restricted to certain work types only. This field also permits the filtering of compliance completion rates based on work type.

Adobe's LMS solution, Captivate Prime, supports a wide variety of personalization options. Click here to learn more about Adobe Captivate Prime.

Creation of user groups

L&D professionals can divide employees entered in the LMS into user groups, each with different learning objectives. User groups are typically automated from the HR employee database feed. User groups can be organized around selected criteria such as job function, role, location, or language. Custom user groups can also be created.

The advantage of having a feature on the LMS that automates groups is that content assignment rules can be associated with group membership. As learners move in and out of groups, content assignments will appear or disappear as appropriate.

When originally configuring an LMS, examine the HRIS database and consider all the possibilities of how employees could be grouped. In addition to thinking about the present, evaluate potential future classifications that might become relevant as the organization (and database) grows.

Rather than using learners' names when creating user groups, rely instead upon job titles or department classifications. Job titles and department names rarely change in most organizations, while employees can come and go. For this reason, the idea of creating user groups based on individual learners' names is not recommended.

Enrollment in learning plans

A learning management system can automatically enroll employees in learning plans based upon predetermined factors. Once again, the HRIS is crucial to this process. Profile information from the employee database is automatically synced to the LMS, allowing L&D to identify and automatically enroll learners in specific courses or establish comprehensive learning plans for them. This can also help L&D professionals orchestrate branched learning for employees, based on the outcome of previous learning activities.

Learning activities can be auto-assigned based on a variety of factors. These might include:

- Onboarding or offboarding, when an employee joins or leaves the staff
- A progression after the successful completion of a previous course
- A promotion or job role shift that requires new skills
- Relocation to a different office or geographical setting

A good learning management system will have robust functionality in creating course and learning plan assignment rules. It will be able to drill down or combine multiple factors in employee user profiles to enroll learners that straddle several defined categories. For example, the LMS could be configured to assign a particular course to anyone with a job title of “Manager” who also works in the “Research Department.” This flexibility makes it easier for system administrators and L&D professionals to assure that customized learning plans are targeted to the correct individuals.

Recommendation of courses

A key component of training is the recommendation of courses based upon an employee’s profile. It is important for training professionals to be able to identify, and then rectify, crucial skill gaps.

The LMS can be a helpful tool in this scenario. A good system will define skill and competency models and then make appropriate recommendations based on successful content completion or manager assignment. For each job role, the learner can see what skills they possess and what skills they need to master. Associating skills and skill levels with content allows the LMS to automatically recommend the content to close the learner’s particular skill gap.

Scheduling of reports to management

Accurate reports, delivered in a timely fashion, are necessary for effective management. In the past, overseers were notified by email when learner content was assigned, overdue, or completed. Not surprisingly, that practice resulted in a large volume of emails that was difficult for time-challenged managers to track and organize. Later, reports made it possible to consolidate the data, but managers had to log in to the LMS in order to generate them.

Today, automated scheduled reports allow management to effortlessly stay on top of the process. Recipients can receive the reports they require in PDF format, viewable on their desktops, laptops, or mobile devices. If they want more detail, managers can click on a link that provides access to the full report and dashboard information.

Announcements, email notifications, and reminders can also be generated automatically to keep users continuously updated and in the loop. Rich media messages can be broadcast to defined user groups when the company wants to promote specific courses or certifications, or when completion of a course is time-sensitive.

Notification to learners of course completion

The learning management system can automatically push email or text notifications to learners as they complete assigned courses. This feature can serve as virtual pats on the back, congratulating employees as they successfully meet their learning goals. In the case of mandatory compliance courses, the automated notification assures workers that the LMS has recorded that the required training was completed.

When configuring the LMS, L&D professionals can stipulate the number of notifications that are sent out. This is important for firms that want to steer clear of notification overload. If the LMS interface lets a learner know that they've finished a course, then an additional email notification may not be necessary. In fact, it may be counterproductive. Some users report feeling bombarded or annoyed by notifications that document every action they take.

A best practice is to limit the number of notifications automatically sent to users and their managers. By being judicious, the LMS notifications will look less like spam, and will instead be viewed as something important that they should pay attention to.

Recurring certificates

The learning management system can automate the process of reassigning expired certifications. This is important for several reasons. Legally, firms want to demonstrate that the organization is up to date and compliant as far as certifications are concerned. There is also a fiscal component. Some certifications have licensing fees associated with them.

Users must be alerted when their certifications are nearing expiration and reminded of the designated courses, programs, or third-party external activities they must complete in order to retain their standing. Although the LMS dashboard can provide this information at a glance, the automatic notification feature helps drive home the imperative.

Automating recurring certificates is a key functionality in learning management systems. Rules can specify how long the original certification is good for, and then automatically replace it on the learner's training plan a select number of days or weeks before expiration. However, often the recertification training path is different than the original path. For example, the original certification may be a six-month course, but recertification may simply require the learner to pass an annual assessment. In such cases, manual administrative intervention can be complex. Automating the whole process can save the organization hours of administrative work while at the same time ensuring regulatory compliance.

CONCLUSION

Automation features available in many of today's learning management systems provide functionality for managers and learners and can save firms a significant amount of time and money. However, when considering automation of the LMS, the biggest winners are the members of the L&D team. Busy L&D professionals will appreciate how many of the automation features will simplify their routine tasks and duties, thus freeing them to concentrate on other aspects of their jobs.

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