

Cloud-based Learning Management Systems

Vendor Evaluation Template

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# Functional Requirements – *How the LMS works*

* Use your own legend to score LMS vendors against your requirements:

| **Item** | **LMS Requirement** | **Score** | **Vendor Comments** |
| --- | --- | --- | --- |
| Course and Curriculum Management |
|  | Can administrators add, update, reschedule, and remove courses quickly without requiring support from the IT organization? |  |  |
|  | Can learning plans be managed by administrators? |  |  |
|  | Can learning plans have an approval chain? |  |  |
|  | Are learners’ training histories saved when they move to another function or location?  |  |  |
|  | Can learning (courses, curricula or certifications) be automatically assigned to individuals and groups? |  |  |
|  | Can the system assign learning by role, i.e., assign curricula to everyone with the supervisor role (access should be limited to the supervisor’s direct and indirect reports)?  |  |  |
|  | Can administrators’ roles be customized with regard to both user groups and functions?  |  |  |
|  | Can courses be shared across multiple domains or groups in the organization?  |  |  |
|  | Can the system restrict access to courses based on specific criteria (e.g., restrict by job function, location)? |  |  |
|  | Can due dates be established for course completion? |  |  |
|  | Does the system track multiple attempts at a learning event? |  |  |
|  | Are effective content authoring tools offered? |  |  |

| **Item** | **LMS Requirement** | **Score** | **Vendor Comments** |
| --- | --- | --- | --- |
| Registration |
|  | Can manager and/or administrator approval be required for course registration? |  |  |
|  | Can prerequisites be required for learning, and can course access be limited to users who have met the prerequisites? |  |  |
|  | Can administrators manually enroll and un-enroll individuals or groups? |  |  |

| **Item** | **LMS Requirement** | **Score** | **Vendor Comments** |
| --- | --- | --- | --- |
| Content Standards |
|  | Is the system SCORM certified? If so, which version of SCORM is certified? |  |  |
|  | Does the system support third-party content integrations, such as Articulate Storyline, or Lectora courseware?  |  |  |

| **Item** | **LMS Requirement** | **Score** | **Vendor Comments** |
| --- | --- | --- | --- |
| Course Evaluation, Testing, and Assessment |
|  | Can administrators write and deploy test questions? |  |  |
|  | Can the user view detailed results of their test performance? |  |  |
|  | Does the system support creating and implementing online course evaluations? How do they work? |  |  |
|  | Does the system provide both pre-testing and post-testing capabilities (including reports that compare pre- and post-test performance)? |  |  |
|  | What question types can be used: multiple choice, matching, fill-in-the-blank, drag-and-drop, and long answer? |  |  |
|  | Does the testing system support: randomizing, hints, limiting number of attempts, practice (unscored)? |  |  |
|  | Can graphics, animations, audio, and video be included in test questions? |  |  |
|  | Can the system set a test score as criteria for course completion? |  |  |

| **Item** | **LMS Requirement** | **Score** | **Vendor Comments** |
| --- | --- | --- | --- |
| Certification |
|  | How are certifications managed? |  |  |
|  | Does the system track certification deadlines? How does it notify users about missed deadlines?  |  |  |
|  | Can certifications expire? Are multiple recertification paths supported?  |  |  |
|  | Will the LMS automatically notify users of an imminent certification expiration?  |  |  |
|  | Can administrators manually grant certifications? |  |  |
|  | Can certifications be versioned?  |  |  |
|  | Can external certifications be tracked?  |  |  |
|  | Are certificates issued automatically when courses are completed? Can users print their own certificates? |  |  |

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# User Experience – *How interfaces impact navigation*

| **Item** | **LMS Requirement** | **Score** | **Vendor Comment** |
| --- | --- | --- | --- |
| Configurability |
|  | Does the user have a “home page” and a dashboard that shows what learning objects have been assigned to them? |  |  |
|  | Is branding available? Can each department have its own look and feel? |  |  |
|  | Can administrators or users add new sections within the portal without additional programming? |  |  |
|  | Is navigation easy and intuitive? How does the system help users get to the right place? |  |  |
|  | Can the LMS display content from other sites such as a corporate portal or YouTube? |  |  |

| **Item** | **LMS Requirement** | **Score** | **Vendor Comment** |
| --- | --- | --- | --- |
| Manager Experience |
|  | How can managers keep track of and approve of training? |  |  |

| **Item** | **LMS Requirement** | **Score** | **Vendor Comments** |
| --- | --- | --- | --- |
| Tutor Experience |
|  | What tools can tutors access to help manage their students? |  |  |
|  | Can tutors add users to a class or other group in bulk?  |  |  |
|  | How are tutors alerted when there is something for them to do? |  |  |
|  | How do you ensure secure file transfers between your SaaS environment and the customer’s workstations? |  |  |

# Mobile Learning – *How you’ll work on the go*

| **Item** | **LMS Requirement** | **Score** | **Vendor Comment** |
| --- | --- | --- | --- |
| Mobile Learning |
|  | Does the LMS support mobile activity (user taking courses or manager reviewing and approving a registration) on smartphones and tablets? If yes, please describe your capabilities.  |  |  |
|  | Does a specific tool have to be used to create content that can be accessed offline? |  |  |

# Blended Learning

| **Item** | **LMS Requirement** | **Score** | **Vendor Comments** |
| --- | --- | --- | --- |
| Blended Learning |
|  | Is there support for multiple methods of course delivery? What methods are supported? (web-based, instructor-led, virtual classroom) |  |  |
|  | How does the system support blended learning activities? For example, can the system mix a series of components in different delivery formats (e.g., pre-test, instructor-led course, on-the-job assignment) and roll them up into a single course? |  |  |
|  | Can self-paced learners bookmark their progress? |  |  |
|  | Can the system store multiple file types, including MS Word, scanned forms, PDFs, videos etc. at the course level? |  |  |
|  | Is there sequencing in blended learning activities, for example, to ensure that a pre-test is taken before the course?  |  |  |

| **Item** | **LMS Requirement** | **Score** | **Vendor Comment** |
| --- | --- | --- | --- |
| On-the-Job Training |
|  | How are on-the-job training activities facilitated and tracked? |  |  |
|  | How are observation checklists facilitated and tracked? |  |  |
|  | Who can mark observation checklists and other on-the-job training activities as successful? Must administrators get involved in every task or can managers and/or senior team members perform all management tasks?  |  |  |

# eCommerce and Custom Branding

| **Item** | **LMS Requirement** | **Score** | **Vendor Comment** |
| --- | --- | --- | --- |
| eCommerce and Custom Branding |
|  | Does product address the learning needs of customers, channel partners, or other outside groups through a specific application? |  |  |
|  | Is audience segmentation supported? Can content be customized for different user domains? |  |  |
|  | Would we be able to develop a separate instance of the site, with specific course offerings for this audience? |  |  |
|  | What branding is available? Is it possible to add logos, define screens and lists, customize user options etc.? |  |  |
|  | What tools are available to market learning to end-customers? |  |  |
|  | Can pre-paid training units be sold?  |  |  |
|  | Does the eCommerce module support the PCI standard? |  |  |
|  | Is there support for differential pricing for different audiences? |  |  |
|  | Are multiple currencies supported?  |  |  |
|  | What payment options are supported out of the box?  |  |  |
|  | Can the system process refunds and drop charges? |  |  |
|  | Does your product support discount coupons? |  |  |

# Reporting and Analytics – *How to get your data working*

| **Item** | **LMS Requirement** | **Score** | **Vendor Comment** |
| --- | --- | --- | --- |
| Reporting |
|  | What are the reporting capabilities of your system?  |  |  |
|  | How many standard reports are available with the system? |  |  |
|  | Does the system provide out-of-the-box, manager-focused reporting (e.g., progress toward team development plans, team/individual-training histories, and certifications/completions)? |  |  |
|  | Are bar charts, pie charts and other graphical reports available out-of-the-box? |  |  |
|  | How can ad hoc reports be built, and who can build them? |  |  |
|  | How can custom reports be created?  |  |  |
|  | What skills are needed to use the reporting tools? |  |  |
|  | Does the system support integration with third-party report writers? Please list. |  |  |
|  | Is the system able to export various formats of data, including ASCII and Excel? |  |  |

# Implementation and Integration

| **Item** | **LMS Requirement** | **Score** | **Vendor Comment** |
| --- | --- | --- | --- |
| Integration |
|  | How is the LMS accessible from enterprise portals and other commonly-used software applications? |  |  |
|  | How does your system integrate with other enterprise systems, such as a organizational HRIS. |  |  |
|  | How does the system support single sign-on?  |  |  |
|  | What reports are out-of-the-box? |  |  |

# Cloud (Software as a Service) Environment

| **Item** | **LMS Requirement** | **Score** | **Vendor Comment** |
| --- | --- | --- | --- |
| SaaS Solution |
|  | Do you offer a SaaS solution? |  |  |
|  | Does your SaaS solution require a client install, or is it Web-based? What browsers do you support? |  |  |
|  | Describe the physical environment of the data centre.  |  |  |
|  | Where are the data centres?  |  |  |
|  | Are your data centres audited by a third party?  |  |  |
|  | Do you have a documented Business Continuity and Disaster Recovery Plan? |  |  |
|  | How does the system scale to support growing user populations?  |  |  |
|  | Are load balancing and redundancy supported by the hosting environment?  |  |  |
|  | In the event of an outage or security breach, what is your policy about notifying customers? |  |  |
|  | What is your back-up strategy? |  |  |
|  | Are upgrades mandatory? How are new releases installed? |  |  |
|  | How do you ensure the confidentiality of a customer’s data in a multi-tenant SaaS environment?  |  |  |

# Support Requirements

| **Item** | **LMS Requirement** | **Score** | **Vendor Comment** |
| --- | --- | --- | --- |
| Support Requirements |
|  | Please describe your Customer Support policy. Include information about response times, escalation policies, and hours of operation. |  |  |
|  | Can Support representatives be contacted via email or log inquiries online during non-business hours? |  |  |
|  | Is support for all global regions available for extended (e.g., 24x7) hours? |  |  |
|  | What online resources are available to customers?  |  |  |

# Training Requirements

| **Item** | **LMS Requirement** | **Score** |  |  | **Vendor Comment** |
| --- | --- | --- | --- | --- | --- |
| Training Requirements |
|  | Do you provide on-site training?  |  |  |  |  |
|  | Do you offer end-user training?  |  |  |  |  |