

ASSOCIATION LEARNING MANAGEMENT SYSTEMS

2013 Edition



The Report

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The Fine Print

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Additional Tagoras Reports

Virtual Conferences, E-learning, and Learning 2.0

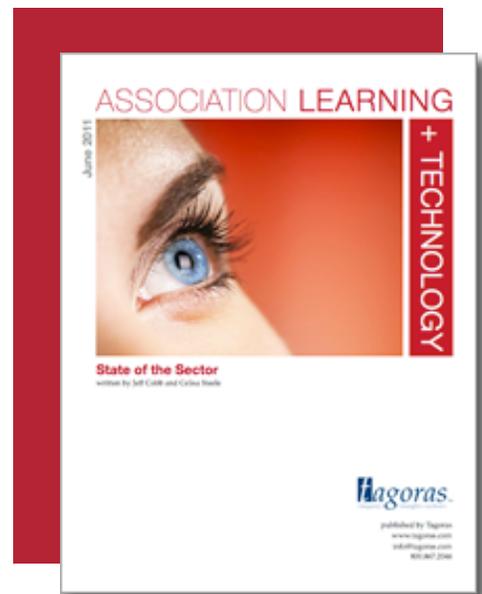


Most organizations reach only a small slice of their members with their traditional place-based conferences. The remainder get nothing—or find other sources for learning and networking. Virtual events can help you solve this critical problem, and *Association Virtual Events: State of the Sector*—designed for trade and professional association decision-makers who want leading edge knowledge to support their strategic planning for virtual events—gives you the information and insights you need to get started.

Learn more at <http://www.tagoras.com/catalog/virtual-events>.

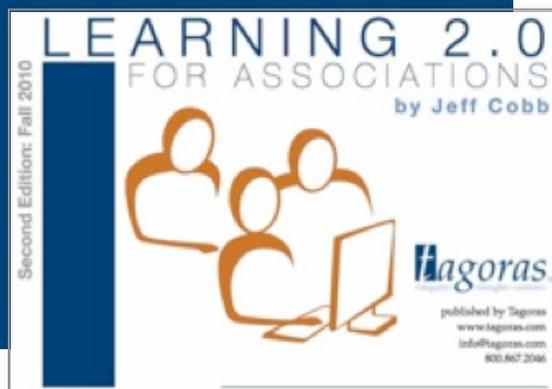
Based on survey data collected from 375 organizations as well as on interviews with 27 associations and 10 technology and service providers, *Association Learning + Technology: State of the Sector* is a 121-page, comprehensive report on technology-enabled learning in the association sector. Associations serious about launching an e-learning initiative or growing a current online education program won't want to be without it.

Learn more at <http://www.tagoras.com/catalog/association-learning-technology>.



The free *Learning 2.0 for Associations* offers a basic overview of how the rise of the social Web has impacted the way that learning happens and how organizations can begin incorporating social media approaches into their traditional online and offline learning activities.

Learn more at <http://www.tagoras.com/learning20>.



Introduction

The Impetus and the Updates

For more than a decade we have helped trade and professional associations use technology to enhance and grow their education programs. During much of this time we built and sold learning management system software and, as a result, experienced first hand the ways in which organizations go about selecting learning technologies. In our opinion, it was usually not an ideal process.

For starters, there never seemed to be a good information source to which organizations could turn for basic knowledge about the systems that were a good fit for member-focused education. Yes, there were—and still are—excellent reports available about corporate and academic learning management systems, but these reports do not address many issues that are important in association education programs. Nor do they attempt to identify the companies that are really focused on serving nonprofit membership organizations.

As a result, organizations typically spent far too much of their limited resources on figuring out the right questions to ask, finding the right vendors, and gathering information. In the meantime, they often skimmed on or simply did not get around to the deeper, more meaningful conversations that would help them find a provider that was truly a great fit for their specific needs. There had to be a better approach.

We're no longer in the software business, but we still focus on helping associations launch and grow successful e-learning initiatives. As part of our work, we've seen signs that demand for

learning management systems in the association sector is on the rise, and that evidence prompted us to release the first version of this report in October of 2009 as a practical research report on systems that are a good fit for associations. A second version came out in 2011, and this is the third version provides updated and new information. The initial report included 11 providers, the second featured 15, and this one covers 20. The continues to be the only publication we know of that offers detailed profiles of key learning management system providers to membership organizations.

For additional resources related to learning technologies and the business of continuing education, visit our free resource center at www.tagoras.com/resources.

The screenshot displays the Tagoras website's resource center. The top navigation bar includes 'Identity', 'Expertise', 'Resources', and 'Research'. The 'Resources' section is highlighted, showing a list of links to various articles and reports. A 'Recommended' section on the left lists items like 'LMS Vendor List' and 'Free Learning 2.0 E-book'. The right sidebar features a 'Newsletter' sign-up form and a 'Tagoras Research' section with a 'New Data on Online Learning' link.

We are truly grateful to the providers participating in this version of the report:

- Avilar
- Blackboard
- BlueVolt
- CommPartners
- Digital Ignite
- Digitec Interactive
- DLC Solutions
- Educadium
- iCohere
- InReach
- Interactyx
- Latitude Learning
- LearnSomething
- Meridian Knowledge Solutions
- Neovation
- Peach New Media
- Starfield Talent Management Solutions
- Thinking Cap
- WBT Systems
- Web Courseworks

The questionnaire we asked representatives from these companies to complete was extensive and required a considerable time commitment. We regard their willingness to provide such detailed information to be a strong sign of their commitment to working with membership organizations.

We hope you find the report useful, but we also welcome your feedback on how we might improve it. Feel free to contact either of us with any suggestions or questions you have.



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What This Report Includes

The Four Primary Sections

This report represents a major effort to provide associations with targeted information about learning management systems to power their learning initiatives.

This report contains four primary sections.

Sector Overview

In Sector Overview we provide a general perspective on LMS usage in the association sector. This section features selected aggregate data compiled from the vendor questionnaire responses as well as key data points from our 2011 *Learning + Technology: State of the Sector* report.

LMS Selection Guidelines

In LMS Selection Guidelines we offer a high-level set of guidelines to help you through the LMS selection process.

Vendor Comparison Tables

In Vendor Comparison Tables we provide a range of tables to help you compare key features, functionalities, and pricing across vendors. This can be a great starting point for homing in on systems that fit your most essential requirements.

Vendor Profiles

This section is where we provide very detailed information on each participating vendor, including the company's response to the survey questions.

The survey was divided into 28 sections and consisted of almost 250 questions. Each section of the survey ended with a free-text response field,

intended as a catchall for qualifications of the company's answers to any questions in the preceding section, caveats, suggestions for improving the survey questions, or general comments.

Please note that company responses are presented as submitted to us, without substantive alteration—we limited our editorial pen to the correction of obvious typographical errors, spacing issues, and the like.

We also try to make your life a bit easier by providing our take on each system. These brief write-ups should help you begin to get a feel for each system, its strengths, and notable gaps.

HOW VENDORS WERE SELECTED

A variety of factors, some admittedly subjective, were used to determine which vendors would be included in this version of *Association Learning Management Systems*.

- Had we ever encountered the system in the association marketplace? Having worked on association e-learning initiatives for years, we were already aware of a number of systems that associations tend to use.
- Did associations that participated in *Association Learning + Technology: State of the Sector* mention the system? In our survey for this other report, we asked respondents about a number of systems, and a number of respondents also wrote in the name of systems we did not list as a survey choice. All of these were considered for inclusion in the report.
- Did the company respond when contacted and agree to complete the survey? We had good contact information (i.e., not just an "info@" address) for the companies we felt might be good candidates for the survey. Some companies did not respond to our inquiries; others responded but then did not complete the questionnaire.
- Finally, the company's product had to meet our criteria for being considered a learning management system. More on this below.

DEFINING LMS

To be considered for the report, a company had to meet the following criteria:

- Offer its own product or add significant technical value to a third-party or open-source product. In other words, the company could not simply be a reseller or hosting provider for a platform.
- Offer its platform for use independent of engaging the company's services. This excludes, for example, conference content capture companies that provide a platform only as an extension of their capture services.
- Be designed clearly for delivering online learning content—as opposed, for example, to general Web site content—and provide a reasonable level of tracking of and reporting on learner use of this content.

We did not, for purposes of this report, make a hard distinction between learning management systems (LMSes), systems intended primarily to deliver and track online learning experiences, and learning content management systems (LCMSes) systems that typically provide for more sophisticated management of learning content objects and typically also include an authoring capability.

We know some readers will object to the blurring of lines between these categories of systems, but we feel the distinction is of limited value, particularly in this market. While some corporate providers still hold firmly to the idea of LMSes and LCMSes as separate pieces of software, academic systems and most of the systems in the association market tend to offer a blend of LMS and LCMS capabilities.

We also did not include pure open-source solutions like Moodle and Sakai in this report. While these may be a viable option for many associations, they are not, in our opinion, well-suited “out of the box” for many core association needs. Three companies in the report have a Moodle base, however, and one offers an open-source version of its proprietary platform.

Whatever your perspective on the definitions, we tried to be clear about whether each system in the report includes content authoring capabilities and whether it can deliver and track standards-based content—the two capabilities that we feel are most fundamental in the LCMS/LMS distinction.

We also included some systems that started as Webinar platforms or focus on that type of learning product. Regardless of origin or focus, if the systems fit the criteria we identified and support other non-Webinar types of learning activities, we included them.

Finally, if you represent a company that you feel should be included in this report, we would be more than happy to learn more about your system and potentially include you in the next edition. Please understand, however, that companies that participate must be prepared to provide the same type of information that companies in this report have provided.



How to Use This Report

Some Notes and Suggestions

We view this report as only one part of a complete, thorough process for selecting an appropriate learning management system.

For many organizations, it will serve as a starting point. By reviewing the report, stakeholders who do not have a good idea of the types of value an LMS can deliver may get a better idea of the requirements most relevant to their organization.

In other cases, an organization may already have a good idea of its requirements, and this document can help in identifying the systems that best align with those requirements.

In either case, though, clearly identifying the business problems you are trying to solve and establishing and agreeing to the most important requirements for your organization are fundamental. This document can help with that process, but is not in any way a substitute for it.

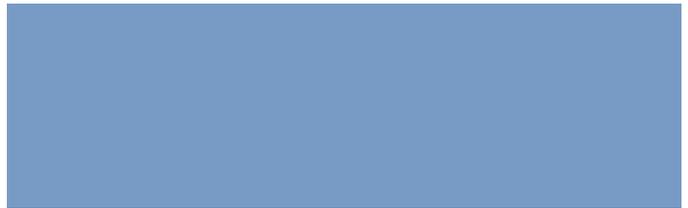
Additionally, this document does not necessarily eliminate the need for a request for proposals, and it certainly does not eliminate the need for adequate due diligence. Our hope is that, by providing a great deal of detailed data up front on features and functionalities, the report will enable organizations to focus less on gathering feature data and filtering out vendors during an RFP process and more on substantive conversations with vendors that seem like an appropriate fit.

We caution you not to take all the answers you find in this report at face value. No matter how carefully we try to ask the questions, there is always room for interpretation. If a particular feature, functionality, or service is of great importance to your organization, be sure ask for a detailed demonstration, check references, and do whatever else may be necessary to confirm that you and the vendor actually understand each other.

This report presents a snapshot of 20 systems at a particular point in time. Most companies continually release enhancements and updates. If a platform looks like a good fit overall but lacks certain features per the report, contact the company

directly to learn if newer versions of the platform provide the functionality.

Finally, as is already implied in the preceding comments, do not expect this report to identify the perfect system. There is no perfect system. Any of the systems in this report may be a great fit for your organization, depending on your specific needs, but there are always going to be gaps. The key is to make sure the gaps are ones that do not interfere with your most fundamental objectives. Our hope is that this report will help make the tradeoffs clearer and, in the end, leave you feeling that you have made the most informed choice possible.



A NOTE ON ANNOTATION AND TERMINOLOGY

As you review the data in the vendor comparison tables and the individual vendor profiles, you'll notice em dashes (—) at times. An em dash is used to indicate the LMS company did not provide a response where one was expected (requested).

You'll also see "NA" and "Not applicable" used. These are used to indicate the LMS company did not provide a response, but no response was expected because the question does not apply (e.g., the question asks about pricing for client-hosted implementations, but the company does not offer client-hosted options).

We encourage you to review the glossary and keep in mind how we defined key terms used in the survey. These definitions were provided to the vendors as well, and they were requested to keep them in mind as they completed the questions.



Glossary

Definitions of Key Terms

Below are definitions of how key terms are used in the survey. Please keep these definitions in mind as you review the vendor responses to the questions.

A

administrator: individual with permission to manage some aspects of the LMS; may be a teacher, facilitator, content developer, or technical manager; compare to *end user*

assessment: one or more questions used to gauge end users' comprehension of topics and content; a test or quiz

association: nonprofit organization that serves its individual or organizational members

C

company: organization offering the LMS

completely custom: used to describe features or functionalities that could be added to the LMS for a particular client via custom programming; compare with *standard, semi-standard, third-party, and unavailable*

client: organization using the LMS

CMS: software used to manage the collaborative creation, editing, review, indexing, searching, publishing, and archiving of digital media and electronic text; acronym for *content management system*

customer: individual employed or served by the organization using the product (could be staff, contractor, end user, etc.)

E

e.g.: for example; abbreviation of the Latin *exempli gratia*

end user: individual accessing and using the product; learner; compare to *administrator*

evaluation: one or more questions used to gauge end users' opinion of topics or content; a survey

I

i.e.: that is, or in other words; abbreviation of the Latin *id est*

implementation: installed instance of the product, usually set up for a client

L

LCMS: software used to provide developers, authors, instructional designers, and subject matter experts the means to create and reuse e-learning content; acronym for *learning content management system*

learning content: what end users access in the LMS for training and education purposes; includes online courses, assessments, PDF-based study guides, etc.

LMS: software for delivering, tracking and managing training and education; acronym for *learning management system*

P

product: unless otherwise defined, the LMS offered by company to clients

S

standard: used to describe features and functionalities that are part of the LMS, even though they may require setup or configuration by the client; compare with *semi-standard, completely custom, third-party, and unavailable*

semi-standard: used to describe features and functionalities that are not automatically part of the LMS and require work by the company but that have been implemented for other clients; compare with *standard, completely custom, third-party, and unavailable*

T

third-party: used to describe features and functionalities of the LMS that are available via products or tools offered by other companies in partnership with the LMS company; compare with *standard, semi-standard, completely custom, and unavailable*

U

unavailable: used to describe features and functionalities not available in the LMS; compare with *standard, semi-standard, completely custom, and third-party*

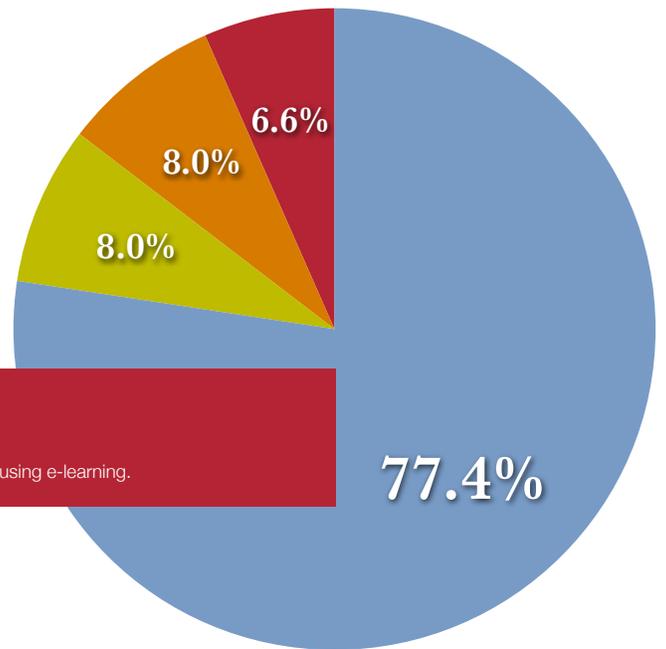
Sector Overview

E-learning and Associations

Our 2011 *Association Learning + Technology: State of the Sector* report updates our March 2009 publication *Association E-learning: State of the Sector*. The report paints a general picture of technology-enabled learning activity in the association sector and, along with earlier research efforts in which we have been involved, suggests that most associations are making use of some form of e-learning or intend to make use of e-learning in the relatively near future.

Does your organization currently using e-learning to deliver education?

Nearly 78 percent of 349 associations responding to a 2010 survey reported currently using e-learning.



- **Currently deliver e-learning**
- **Planning to deliver e-learning in next 6 months**
- **Planning to deliver e-learning in next 12 months**
- **No plans for e-learning for at least next 12 months**

Knowing Webinars are a common format for delivering education, we weren't surprised to find that they are, in fact, the most common form of online education delivery in the association sector: 82.9 percent of organizations already using e-learning reported real-time Webinars as a form of delivery. Interviews with a range of associations support our view that Webinars are often seen as a relatively easy, low-risk way to enter the e-learning market.

At the same time, the data for the *Association Learning + Technology* report indicates that on-demand, self-paced forms of learning have a significant foothold in the market. Archived recordings of Webinars and Webcasts are one example of this type of content. Not surprisingly, 70.9 percent of associations already using e-learning indicate they offer recorded Webinars or Webcasts. But just under half (48.8 percent) also report offering self-paced, on-demand courses that are not recorded Webcasts or Webinars. Another 36.0 percent indicate they offer audio or video podcasts—a bit higher than those that offer CD-ROMS or DVDs (30.2 percent).

The popularity of on-demand content, in our opinion, is one of the major factors that will drive learning management system (LMS) adoption in the association sector. Additionally, we are encountering more organizations that see value in

using an LMS to manage all their learning formats—from place-based seminars to live Webinars to self-paced e-learning courses. An LMS can provide learners with a single gateway for activities like accessing course materials, launching a live Webinar, filling out an evaluation, and viewing a transcript. Organizations benefit from being able to manage registrations, track learner activity, and run reports within a single system.

Exactly how widespread and sophisticated association implementation of learning management technologies will be remains to be seen. Currently, only 32.6 percent of the organizations that offer e-learning make use of a learning management system. An additional 13.3 percent indicate that they plan to implement an LMS within 12 months. Our research indicates that organizations that offer self-paced, on-demand online courses are much more likely to implement an LMS. Among these organizations, 67.5 percent report either already using an LMS or planning to within the next 12 months.

The benefits these organizations tend to realize from implementing an LMS are the same benefits that will accelerate growth as more organizations become aware of them. Namely, a learning management system can:

- Facilitate the sale of learning products to members and customers
- Provide sophisticated tracking of product usage by learners
- Ease the administrative burden of dealing with continuing education credit
- Provide self-service access to certificates, transcripts, and other resources for learners
- In many instances, be used for managing both online and classroom-based training

We are also finding that an increasing number of LMSes enable organizations to provide chapters, corporate members, and other organizational users with their own branded or co-branded instances of the LMS. In addition to any fees the association may charge organizations or groups for using the LMS in this way, this scenario can create new distribution channels for the association's educational content.

Considering that well under half of current e-learning programs have implemented an LMS in a market that continues to grow and mature, it seems a reasonable bet we will see the number of LMS implementations rise significantly in the coming years.

Barriers to Growth

In spite of what seem bullish conditions for growth of the association LMS market, the majority (63.5 percent) of organizations planning an e-learning initiative are unsure about whether they will use an LMS. There are, in our opinion, a number of factors that contribute to this situation:

- The current state of the economy
- A general lack of knowledge about what a learning management system is and how it can help support the business objectives of the organization
- A perception that LMSes are expensive and that implementations are typically complex and time-consuming

Interest in e-learning is strong as a result of travel budget cutbacks and increased concern about time out of office, but an LMS purchase, even if desired, is still perceived as out of reach by many organizations. We have to believe economic conditions will improve over time. Additionally, organizations will become more informed about the potential operational and revenue-generating advantages that implementation of an LMS can offer. Customer education along these lines, in particular, is an area where LMS providers would be well-advised to refine their efforts.

Better information about the cost and time required to implement an LMS is one of the major benefits we hope this report will provide to organizations.

Implementation Costs and Timelines

Implementation of a learning management system (LMS) or learning content management system (LCMS) is usually a sign that an organization has made the decision to invest significantly in an e-learning strategy—presumably because it sees the potential for a positive return on that investment. Like other complex software, these systems often come with significant licensing fees, and the time and cost for implementation can be substantial, particularly if integration with other systems is involved.

In the survey completed by vendors featured in this report, we asked about both pricing and implementation timelines.

PRICING

To gauge the general level of pricing for LMS implementation in the sector, we asked each company to respond to the following:

- For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Some companies did not provide specific pricing figures, but among those that did, the average year-one cost ranges from a little over \$22,000 to almost \$102,000.

We also asked companies to provide a cumulative figure over three years, to help gauge the potential longer-term costs of an LMS implementation. The average three-year cost ranges from around \$44,000 to \$236,000.

All the companies participating in this report indicated a preference for hosting the learning management system and providing it to the client either through a dedicated server set-up or on a software-as-a-service (SaaS) basis. This approach is generally advantageous to the LMS company because it helps limit the resources and time needed for support, maintenance, and ongoing development of the application. We feel it is also advantageous for the vast majority of clients for

these very same reasons. The hosted approach also generally translates into lower overall costs to the client, based on the data we collected from the LMS vendors. Eight of the twenty companies participating in the survey—Avilar, Blackboard, DLC Solutions, iCohere, Latitude Learning, Meridian Knowledge Solutions, Thinking Cap, and WBT Systems—support client-hosted implementations of their LMSes. For those of the eight companies that provided detailed pricing information, the average year-one cost ranges from approximately \$43,000 to \$155,000, and the average three-year cost ranges from around \$66,000 to almost \$244,000.

First-year and Three-year Average Costs for an LMS by Number of Registered Users: Hosted by Client

Number of registered users	500	2,500	5,000	10,000	25,000	Unlimited
First-year average cost (USD)	\$43,063	\$65,313	\$89,938	\$119,063	\$154,813	\$113,125
Three-year average cost (USD)	\$65,756	\$110,406	\$145,738	\$196,225	\$243,763	\$176,375

First-year and Three-year Average Costs for an LMS by Number of Registered Users: Hosted by LMS Company

Number of registered users	500	2,500	5,000	10,000	25,000	Unlimited
First-year average cost (USD)	\$22,376	\$38,817	\$54,060	\$71,943	\$101,760	\$70,857
Three-year average cost (USD)	\$43,889	\$83,863	\$121,047	\$171,763	\$235,547	\$165,286

Average LMS Implementation Times in Calendar Days by Complexity

Simple	Typical	Complex
19.2	48.4	102.8

IMPLEMENTATION

With many organizations seeking to respond to the economic downturn by increasing their online education options, the time it takes to implement an LMS is more important than ever before.

We asked participating companies to respond to the following question regarding implementation:

- In calendar days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Based on these criteria, averages across the participating companies were 19.2 calendar days for simple LMS implementations, 48.4 for typical implementations, and 102.8 for complex ones.

We did not ask companies to distinguish between timelines for company-hosted versus a client-hosted implementation. In our experience, however, implementations for company-hosted solutions require significantly less time than those for client-hosted solutions.

Learning Management and Member Management

At the heart of nearly every association is a membership database of some sort. In smaller organizations, this may take the form of a simple Excel sheet or a Microsoft Access database. As

organizations grow, they often adopt one of the more sophisticated association management systems (AMSes). Data related to educational programs and certification very often finds a home in these systems, thus creating a need for all or parts of data generated in other systems to eventually make its way back to the AMS.

The integration of more sophisticated learning management technologies with existing association management systems is, in our opinion, one of the major opportunities available to associations for collecting and mining data that will help them better target their offerings to members.

INTEGRATION

In the survey for our *Association Learning + Technology* report, we asked respondents who indicated their organization used or planned to use both an LMS and an AMS system whether the two systems were integrated. Most either had already integrated or planned to integrate the two systems.

As a general rule, integration between a learning management system and an association management system happens at three levels:

1. Single sign-on
A user who logs into the association's AMS (usually perceived by the end user logging into the organization's Web site) can navigate to the learning management system and access her courses or other content without having to log in again. This is the most fundamental level and is generally a prerequisite for other types of integration to occur.

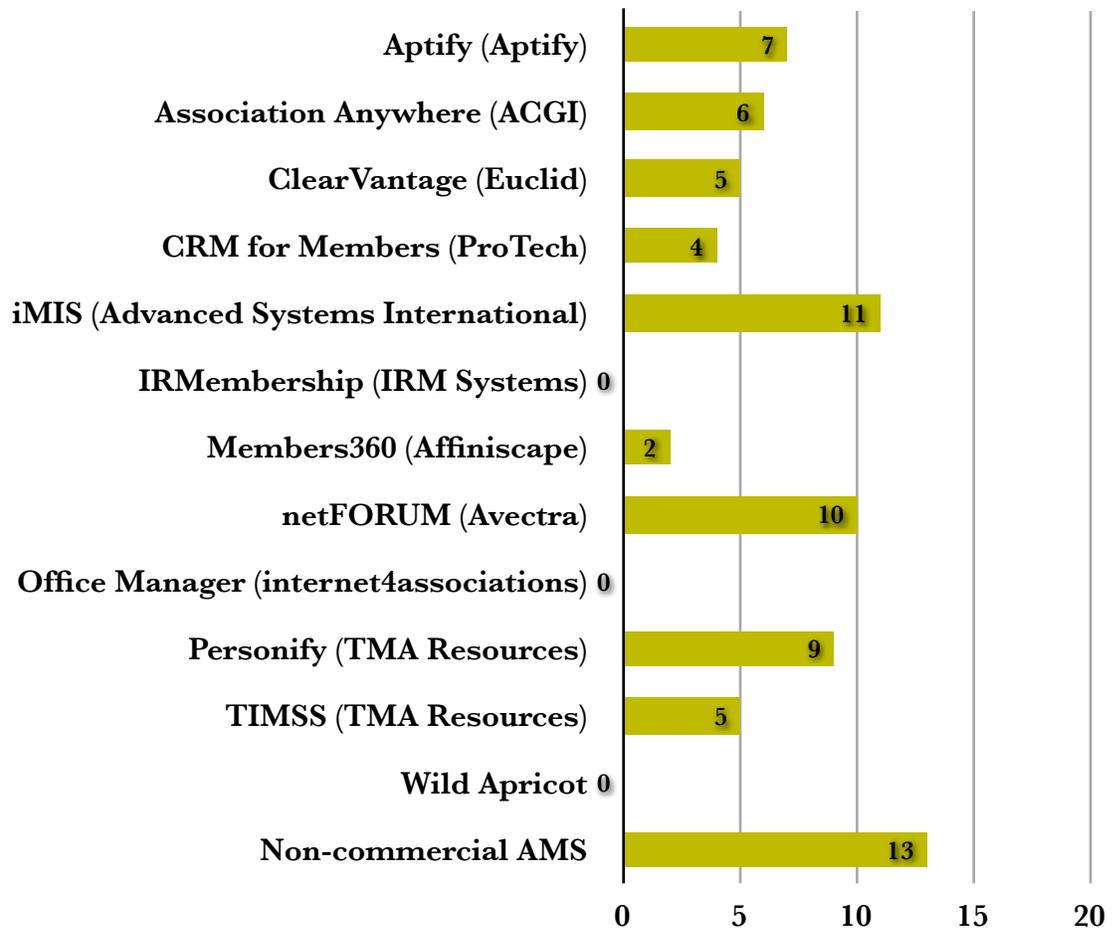
2. E-commerce
A user purchases a course using an e-commerce system that is provided as part of the AMS, or is already integrated with the AMS, and details of the purchase are automatically passed to the LMS. When the user next accesses the LMS, the system knows to present the newly purchased content to the user.
3. Learner activity data
As a learner accesses courses and other materials in the LMS, the system accumulates a variety of data about the learner’s activities—for example, how much time she spends in a course, what her scores are on assessments, and whether she has completed a course. It is often useful for the AMS to know about some or all of this data—particularly data related to course completion and issuance of continuing education credit or certificates.

We asked vendors to indicate with which AMSes, out of a list of popular systems, their LMS has been integrated for client implementation. Of the 20 LMSes covered in this report, all but BlueVolt indicated having been integrated with some AMS (completely custom (non-commercial) AMSes, iMIS, netFORUM, and Personify topping the list), and BlueVolt says it can provide single-sign on integration with customer portals via XML over HTTPS.

E-learning Guidelines and Standards

The various standards and guidelines that exist for e-learning assume their greatest importance in the context of a learning management or learning content management system implementation. The standards—the major ones of which are summarized in “Key E-learning Standards in Brief,” which follows—help ensure the portability of content from one system to another and also clarify the parameters for tracking data in a compliant LMS system.

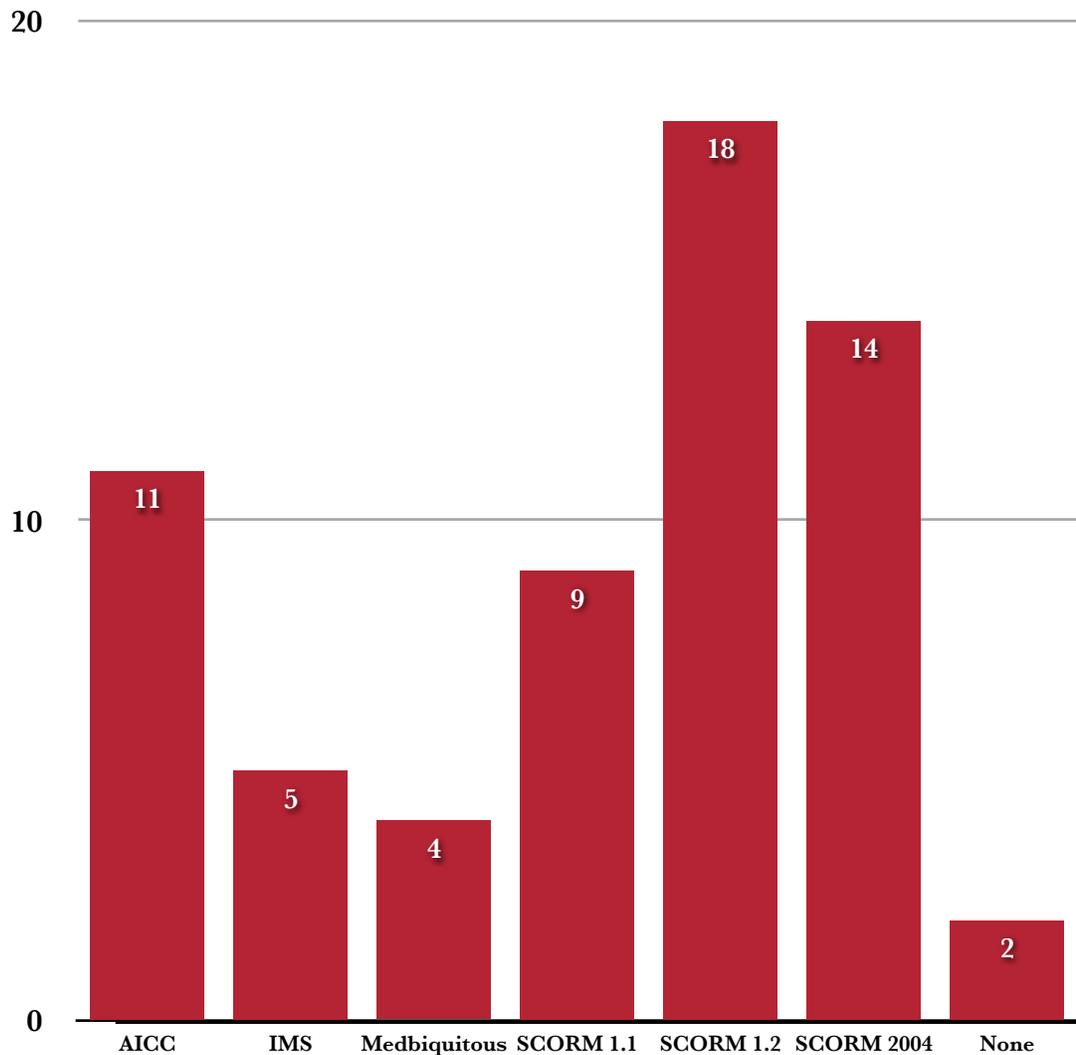
LMS and AMS integration
Of the 20 LMSes covered in this report, all but BlueVolt indicate having been integrated with an AMS.



Data collected for the *Association Learning + Technology* report suggests that standards are not an especially important factor in current association e-learning initiatives. Only 22.1 percent of organizations currently delivering e-learning identified adherence to the Shareable Content Object Reference Model (SCORM) as “highly important” or “absolutely necessary.” Among organizations that use an LMS, however, 43.8 percent rated adherence to SCORM as either “highly important” or “absolutely necessary.” Organizations offering self-paced online courses—a group much more likely to have a LMS—were also more likely to indicate that SCORM was very important or absolutely necessary (32.5 percent).

We asked LMS vendors to indicate whether their systems launch and track content that conforms to the major standards. The results suggest SCORM and AICC are well supported.

We didn’t ask about explicitly about Tin Can (<http://tincanapi.com>), but one vendor (Meridian Knowledge Solutions) indicated it has already implemented that newest of standards, and we expect to see conformance to that stand grow in the coming years as the Tin Can Project progresses beyond the initial API.



LMS support for standards and guidelines

Two of the LMS companies (iCohere and InReach) support none of the standards or guidelines.

Key E-learning Standards In Brief

The **Airline Industry CBT Committee, more commonly known as AICC**, was one of the first groups to establish standards for how computer-based training (CBT) should communicate with computer-managed instructions systems (CMI) designed to track training activities. First established in 1993, the AICC CMI Guidelines for Interoperability (http://www.aicc.org/joomla/dev/index.php?option=com_content&view=article&id=64&Itemid=28) form the basis for much of the subsequent work that has been done to ensure that an e-learning course created for use in one learning management system will also function properly in other systems.

A central focus of the **IMS Global Learning Consortium** is how learning content can be tagged so that it can easily be discovered and reused, whether in a single system or across multiple, disparate systems. The various IMS specifications (<http://www.imsglobal.org/specifications.html>) are at the root of terms like *reusable learning object* as well as the most current approaches to interoperability. It should be noted that IMS standards are based on the extensible markup language, or XML, specification created by the World Wide Web Consortium (W3C). XML is the language used for tagging learning content objects.

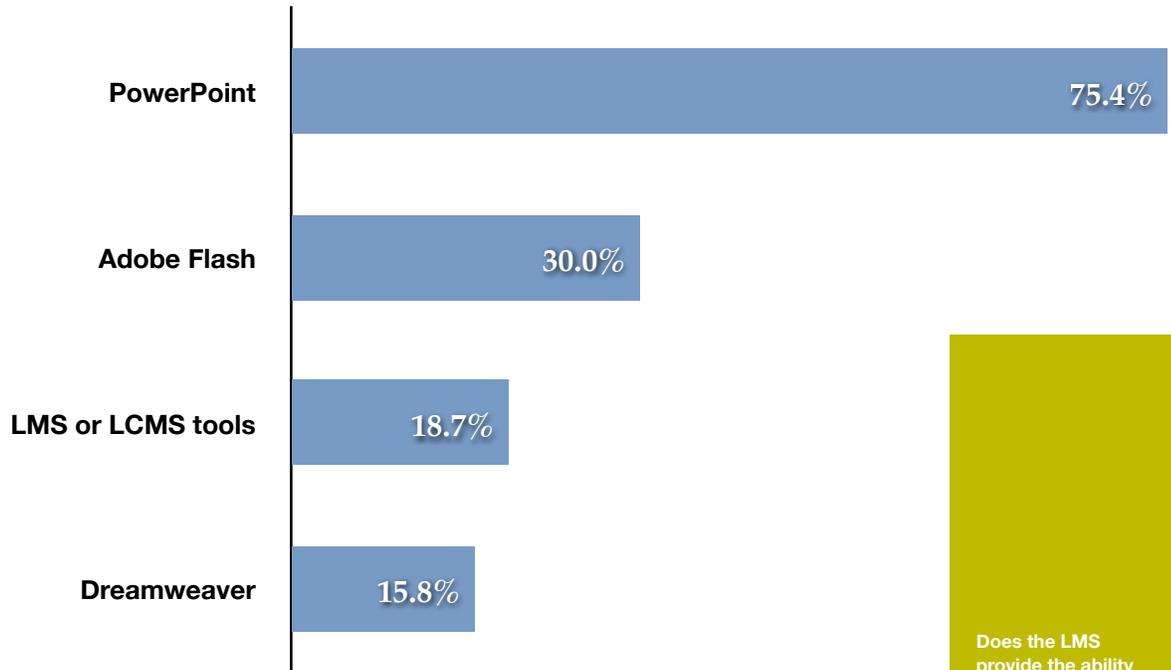
The **Shareable Content Object Reference Model, or SCORM**, is perhaps the most widely recognized set of standards in the e-learning world. It unites standards from AICC, IMS, W3C, and other sources to create a general model for defining, packaging, and managing learning objects. An LMS that is SCORM-compliant should provide the ability to import, launch, and track a lesson or course that has been developed according to the SCORM model. Additionally, an LCMS, or an LMS that features content management capabilities, should be able to recognize and manipulate the shareable content objects, or SCOs, which comprise a piece of learning content.

Medbiquitous (<http://www.medbiq.org>) is an organization focused on leveraging XML to establish a set of interoperable standards exchanging educational content and tracking learner activities and profiles as part of healthcare education and competence assessment. We included Medbiquitous as part of the survey based on our knowledge that many healthcare associations are already active in e-learning.

Section 508 (<http://www.section508.gov>) refers to the Rehabilitation Act of 1973 and subsequent amendments designed to address the accessibility of electronic and information technologies, including the Web, by people with disabilities. Federal agencies are required—with some limited exceptions—to meet standards defined under Section 508 when purchasing electronic and information technologies, which means that any entity hoping to sell to the federal government must ensure that its products comply to the standards. Requirements aside, many developers and consumers of e-learning feel that compliance with Section 508 is simply the right thing to do. For additional information on Section 508 as it relates to e-learning, see <http://www.access-board.gov/sec508/e-learning.htm>.

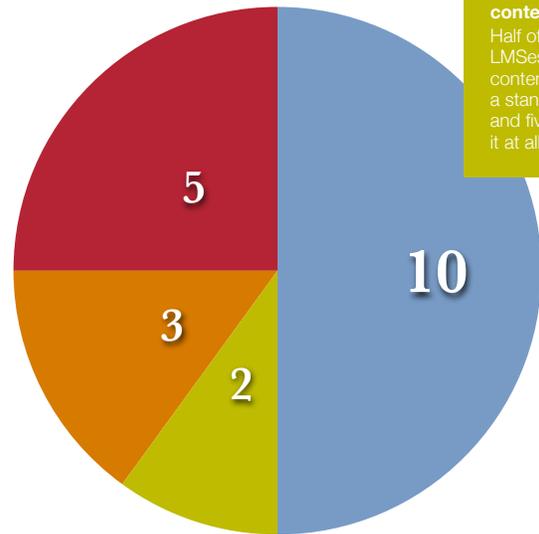
Authoring tools

Among the organizations surveyed for *Association Learning + Technology*, Microsoft PowerPoint was the indisputable frontrunner. Adobe Flash, tools built in to the association's LMS or LCMS, and Dreamweaver round out the top four.



Does the LMS provide the ability to author learning content?

Half of the twenty LMSes provide content authoring as a standard feature, and five do not offer it at all.



● Standard ● Semi-standard
● Third-party ● Unavailable

Content Authoring

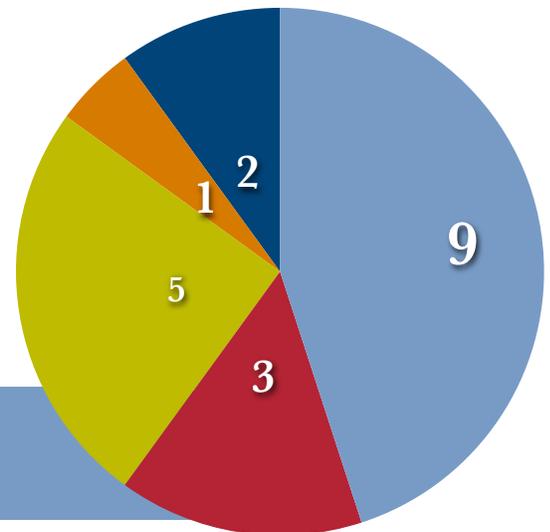
While content delivery, tracking, and reporting are the most fundamental activities associated with a learning management system, content has to exist before these activities occur.

In the *Association Learning + Technology* report, we note a range of tools organizations use for developing e-learning. PowerPoint leads the pack by a good margin—not surprising given that PowerPoint is the starting point for most Webinar content as well as for many off-the-shelf course development tools. Adobe Flash is the next most popular tool, but with only 30 percent indicating they use it, it's a distant second to Microsoft's product. As HTML5 gains ground, we expect to see use of Flash decline. LMS or LCMS tools come in third overall, but among organizations that have actually implemented an LMS or LCMS, they jump to second position—44.9 percent—behind PowerPoint's 71.0 percent.

We asked LMS vendors to indicate whether their system includes any tools for authoring content. Also, given the importance of PowerPoint, we how their systems accommodate PowerPoint content for course authoring.

Does the LMS provide import options to automatically repurpose Microsoft PowerPoint content into learning objects in the system?

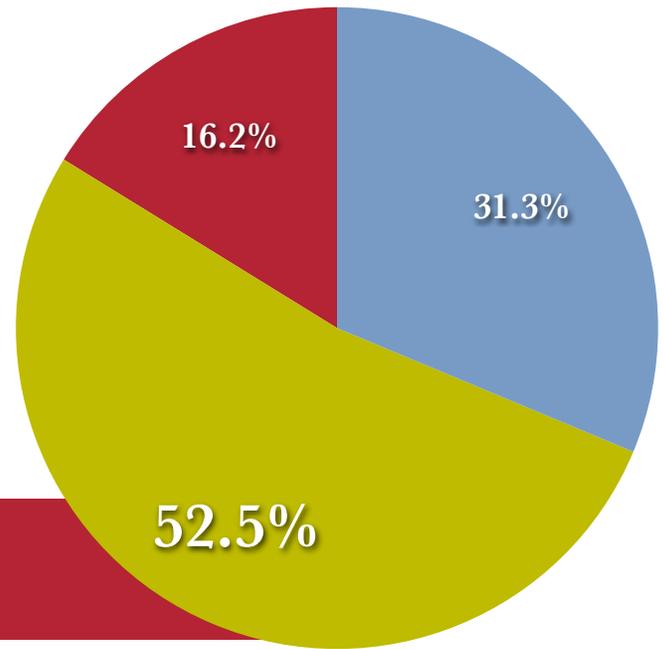
Nine of the LMSes provide such import options by default.



● Standard ● Semi-standard ● Third-party ● Completely custom ● Unavailable

Selling E-learning

One of the key ways in which association e-learning differs from online education and training in the commercial corporate sector is that most associations look to e-learning—and to education in general—as a source of non-dues revenue. E-learning is thus a line of business rather than a cost center for most organizations. At a minimum, it needs to operate on a revenue-neutral basis, bringing in enough income to cover costs. For many organizations, it also needs to contribute positive revenue to the bottom line.



What are your organization's financial goals for its current e-learning offerings?

According to our *Association Learning + Technology* report, the vast majority of association e-learning programs must be at a minimum self-sustaining.

- **Must be self-sustaining but profitability not required**
- **Doesn't need to be self-sustaining (costs subsidized)**
- **Must be self-sustaining and profitable**

Given the existence of this revenue imperative in the sector, one of the important components of our LMS research was to understand the e-commerce capabilities of each system included in the report.

Starfield is the only system profiled that does not support automatic enrollment into a course based on an e-commerce transaction. We also asked vendors to provide information about the specific types of transactions that can be handled by e-commerce in their systems. The following chart illustrates the availability of different types of e-commerce transactions across the group of systems this report profiles.

An important point about e-commerce, in general, is that many associations already have e-commerce in place, whether through their association management system or another solution. It is often preferable, therefore, for the learning management system to integrate with the existing e-commerce solution. In these cases, the application programming interfaces (APIs) available for the LMS as well as the vendor's experience with integration are more important than any built-in e-commerce capabilities the LMS offers.

Which types of e-commerce transactions are available through your LMS?	Availability				
	Standard	Semi-standard	Third-party	Completely custom	Unavailable
Provides for secure transactions (e.g., via SSL)	17	1	1	0	1
Handles transactions for online courses	17	1	1	0	1
Handles transactions for other online items (e.g., PDF study guides)	12	3	1	2	2
Handles transactions for physical items (e.g., books or CDs)	9	2	1	5	3
Automatically handles payment by credit card (no manual intervention needed)	17	0	1	1	1
Handles payment by check (manual intervention needed)	11	3	1	1	4
Handles payment by invoice (manual intervention needed)	12	2	1	3	2

Continuing Education and Certification

Whether to award some form of credit for e-learning is an important decision both operationally and strategically for an organization. From an operational standpoint, there is typically a significant amount of footwork to be done simply to be accredited for providing continuing education credits—even for a certification or credential maintained by the association itself—and usually there are reporting requirements to be followed once accreditation is established. Even relatively simple certificate programs that do not offer continuing education credit can generate a significant amount of operational overhead.

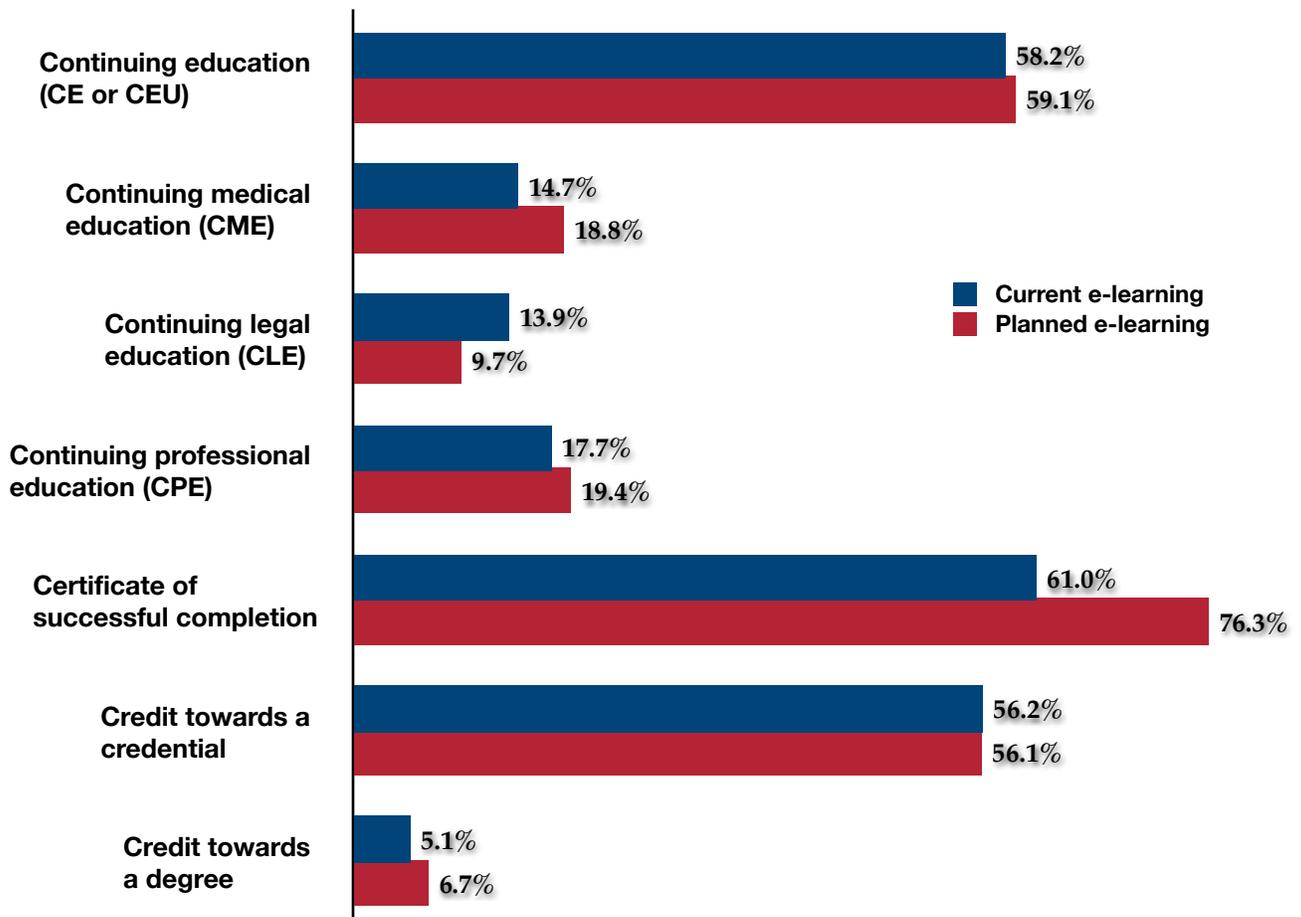
Along with the ability to support revenue generation, one of the most significant benefits a learning management system can offer to an organization is increased operational efficiency in

managing various aspects of awarding and issuing credit. We asked vendors to indicate whether their systems could handle both simple and complex scenarios as well as to provide a range of information about the types of activities to which credit could assigned.

- Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
- Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user’s state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?

Which type of credit does your organization currently offer or plan to offer for e-learning? Check all that apply.

The majority of organizations offering or planning to offer e-learning also award or plan to award some form of credit.

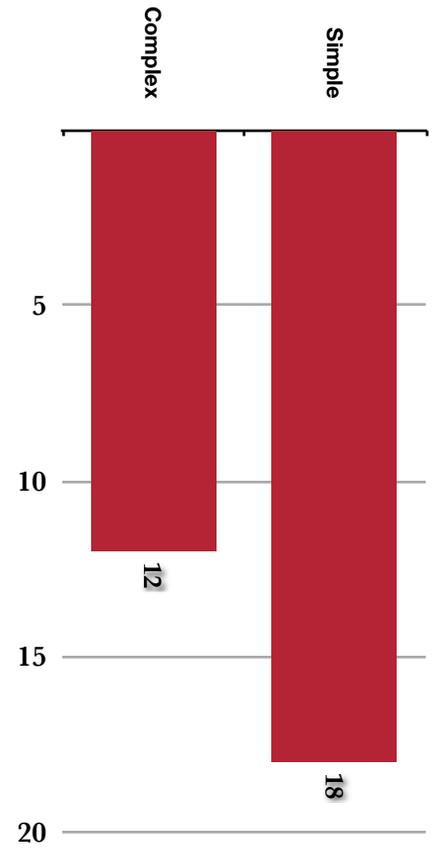


Some of the systems profiled in this report also offer options for tracking certification paths as well as for automatically directing a learner to the courses needed to support a particular certification or competency.

Overall, management of continuing education, certificates, and certification paths can be one of the most valuable aspects of implementing a learning management system, but the true capabilities of a particular system in these areas can be difficult to assess. During the LMS selection process we strongly recommend that organizations map out clear business requirements and use cases in these areas and ask each vendor to provide a detailed demonstration of how the LMS supports these requirements and use cases—and how any gaps might be filled.

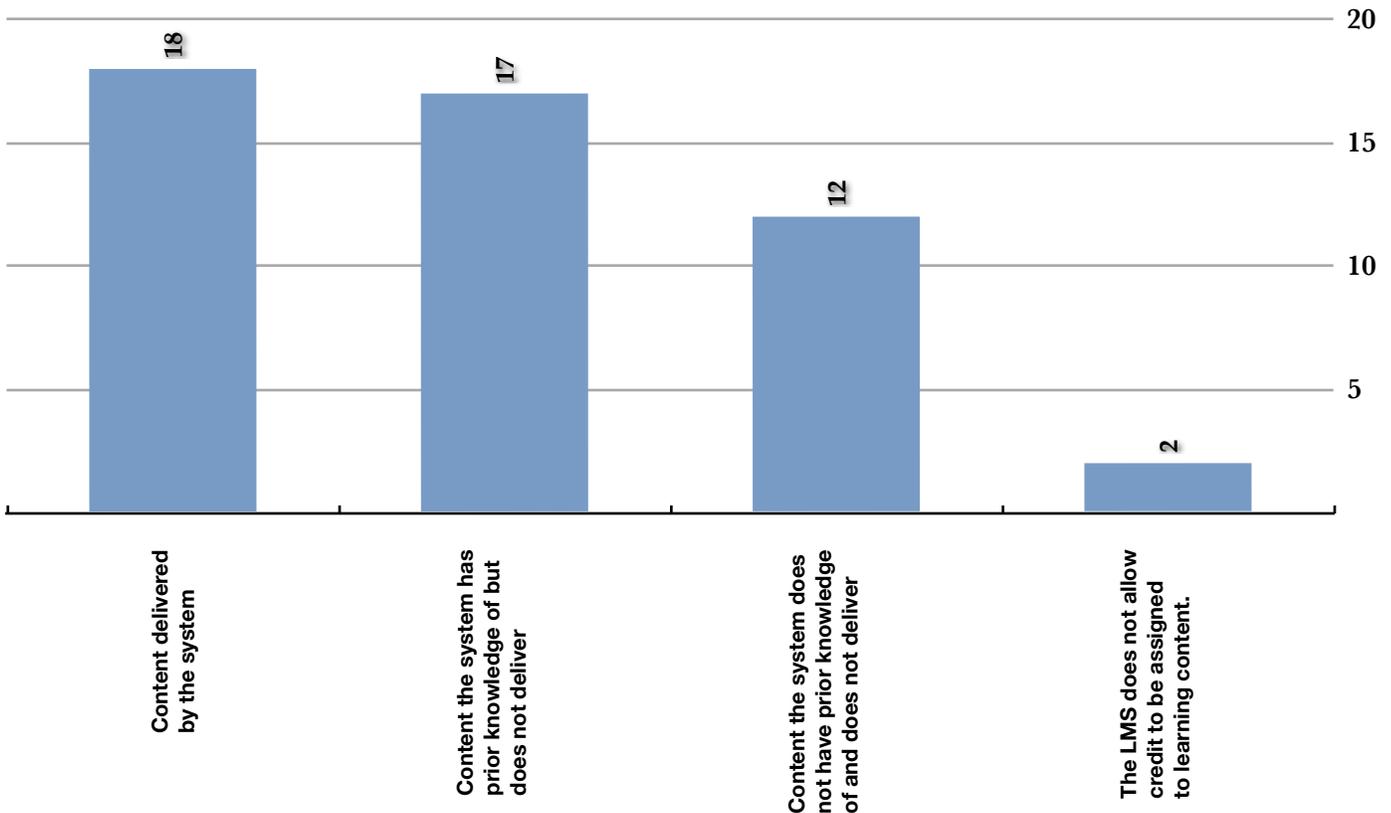
Does the LMS support simple and complex credit scenarios?

Eighteen of the 20 LMSes support simple credit scenarios. Twelve support complex ones.



To what types of learning content can credit be assigned?

Eighteen of the LMSes can assign credit to content they deliver. Only two LMSes do not provide the ability to assign credit to any learning content.



LMS Selection Guidelines

Questions to Consider

Starting on the next page, we have included questions we feel an association may want to ask when developing requirements for a learning management system and undertaking a selection process. The list is not intended to be comprehensive, but it should provide a solid starting point for your selection efforts.

The questions are purposely not targeted at specific LMS features. Rather, they are intended to surface general issues and circumstances that the implementation of a learning management system may help address.

We have a few overarching suggestions to accompany the questions:

- Start with stakeholder value.

Faulty LMS selection processes tend to start with a list of features; better ones start with a clear idea of the business problems to be solved and the desired user experience. The best ones, however, start with agreement about the value that a more formal approach to learning management will create for all key stakeholders.

- Determine the desired user experience.

Once the value to be created is clear, meticulously map out the elements of the ideal user experiences for achieving that value.

- Focus on the highest-priority features.

When the value and the user experience are clear, the highest-priority features and functionalities will also become clear. An LMS can do many things, but most organizations only need it to do a particular set of things really well.

- Leave no stone unturned.

Make sure vendor demonstrations cover your highest-priority features and functionalities in exhaustive detail. If, for example, it is important for you to be able to assign continuing education credit to a course, make sure you walk through every step of the process and are satisfied that it either delivers on the user experience and value you need or that you have a clear plan for filling any gaps.

Finally, the above steps are not ones that an organization needs to take in isolation. Good vendors will want to understand your overall strategy, the value you are trying to create, and the desired user experience. Sharing your thinking in these areas—and soliciting vendor input—will help ensure that you end up with the best possible platform to support your strategic needs.

The Questions

Once an organization has answered these questions, the parts of the report indicated in the colored blocks beside the questions may be used to determine how well a specific LMS supports the answers.

- How important is it for us to follow the model of other associations and potentially learn from their experiences?
- How many learners do we expect to serve through the LMS?

**General Company
Information**

**General LMS
Information**

LMS Implementation

- What length of time do we feel is reasonable for implementing a system, based on our organizational goals?
- What resources can we dedicate to it internally?
- Have we taken into account potentially more complex parts of an implementation, like integrating with other systems?

- How much is it reasonable for us to spend on a learning management platform, based on potential revenue, cost savings, or other key considerations?

Pricing

Technology System Requirements

- Does it matter what technologies were used to develop the LMS?
- Does it matter what technologies are needed to host the LMS?
- How scalable does the LMS need to be (e.g., do we foresee a large number of learners overall or situations where many learners will access the platform simultaneously)?
- Do we need a lot of storage for our learning content (for example, if a lot of video will be used in an e-learning program)?
- Do our end users or administrators have any special technology challenges or requirements we need to consider?

Integration and Interoperability

- Does the LMS need to integrate with a Webinar platform?
- Does the LMS need to integrate with our AMS platform or other key software, like our Web content management system or e-commerce system?
- Do we want to make third-party content (e.g., “off the shelf” catalog courses) available through the system?

Standards and Guidelines

- Is it important for us to be able author content within the LMS?
- If so, how “portable” does that content need to be (e.g., is there the possibility that we would need to move the content to a different system in the future or license it to third parties that use a different system)?
- Will we need to offer our learners course experiences or other content that was authored outside of our system?

- Is it important for us to host the LMS?
- What are some of the details we would want to know about hosting provided by the LMS company?

Hosting

Personalization

- Is it important that the learner be able to specify her time zone or language or otherwise “personalize” her learning environment?
- Is it important for us to provide the learner with course recommendations or special content based on her profile data, activity in the system, or other criteria?

- How closely will the learning environment need to reflect our overall organizational branding?
- Is it important that we be able to modify the overall look and feel? The navigation? The general content in the learning environment?
- Will there be a need to do any of this for administrators as well as for end users?

Interface Configuration

- Do we plan to serve an international audience with the learning management system?
- Which languages other than English will the system need to support?
- Can we easily replace specific terms used in system navigation or other areas with translations or different terms entirely?

Internationalization and Localization

Search and Catalogs

- How large do we expect our catalog of offerings to be?
- Will it be important to offer end users options for searching the catalog?
- Will it be important to offer administrators options for searching the catalog?

- Which modes of learning do our learner preferences and learning objectives call for? Completely on-demand and self-paced? Real-time? Facilitated over a period of time?
- Will the content for a single learning experience be authored and/or reviewed by multiple people?
- In what form does the source content for our online learning exist (e.g., Microsoft Word or PowerPoint)?

Authoring, Managing, and Displaying Learning Content

In-person, Place-based Courses

- Would we benefit from managing our classroom-based courses through the learning management system?
- Would this include education sessions at conferences?

- Do we currently deliver or will we want to deliver Webinars as part of meeting learning objectives and learner needs?
- If so, how important is it for the Webinar environment to integrate with the learning management system (e.g., is it important that they share the same registration and enrollment process)?
- Is it important that learners go through the LMS to access a Webinar?

Webinars

- What are the ways in which our learners will typically register at our Web site, and what process or processes will result in their enrollment in a learning experience?
- Is it important to support multiple options for registration and enrollment?

Registration

Enrollment

Managing Continuing Education and Certification

- Do we expect to issue continuing education credit for learning experiences managed through the LMS?
- What are the complexities of our credit process, and how would a software system ideally support this process?
- What key requirements do our end users have for tracking their continuing education?
- How might we add significant value beyond these requirements?

Assessments

Evaluations

- What role will assessment play in the learning experiences we intend to manage through the LMS?
- What are the complexities of our approach to assessment, and how would a software system ideally support this approach?
- What role will evaluation play in the learning experiences we intend to manage through the LMS?
- What are the complexities of our approach to evaluation, and how would a software system ideally support this approach?

- What data will we need to access to determine that the learning experiences we intend to manage through the LMS meet the success criteria we have defined for them?

Reporting

- Is it important for us to provide chapters, corporate members, or other organizational stakeholders with access to the tools available in the learning management system?

Support for Multiple Sites

**Custom Programming
and Content
Development**

- Do we have needs so specific that custom programming for the LMS may be needed to meet them?
- How desirable is it for the LMS provider to be a one-stop shop that can also provide course development services?

E-commerce

- Do we plan to sell courses or other learning experiences that will be accessible through the learning management system?
- What are the complexities of our commerce process (e.g., member discounts, volume discounts, etc.), and how would a software system ideally support them?

- Ideally, how “hands on” will we be in managing the LMS and supporting our end users?
- How much support do we expect our end users to need?

Support and Training

- What role do we expect communication and collaboration to play in achieving learning outcomes and meeting learners’ needs?
- What are some specific types of communication and collaboration it is important for the learning management system to support?

**Collaboration and
Communication**

Vendor Comparison Tables

Key Data by LMS Company

The tables in the following pages are intended to facilitate comparison of LMS companies for a significant portion of the data collected for this report. You will not find comparisons for every piece of data submitted by vendors—we felt that would be overwhelming—but the most essential information is represented here. The tables are a good starting point for getting a feel for the range of options available before focusing on specific vendor profiles.

For several questions, the answer options were not simply yes or no but the following five choices: standard, semi-standard, third-party, completely custom, and unavailable. Please consult the glossary for how we define these terms. An em dash (—) indicates the LMS company did not provide a response where one was expected (requested), and “NA” indicates the LMS company did not provide a response, but no response was expected because the question does not apply (e.g., the question asks about pricing for client-hosted implementations, but the company does not offer client-hosted options).

The tables are grouped below by survey section. The question or questions (sometimes in edited form) used to draw data for the table appear just before it. In some cases, not all answer options are represented in the table. We encourage you to consult specific vendor profiles for companies’ complete responses and the exact wording of the questions and answer options as presented to the LMS companies.

General LMS Information

ASSOCIATION AND OVERALL CLIENT NUMBERS

5. How many *associations* use this LMS?
6. How many organizations in total use this LMS, including associations?

	Associations	Total organizations
Avilar (WebMentor LMS)	7	150
Blackboard (Blackboard Learn)	30	5,500
BlueVolt (BlueVolt)	11	1,000
CommPartners (MemberSight Community)	2	2
Digital Ignite (Crowd Wisdom)	45	56
Digitec Interactive (Knowledge Direct)	26	34
DLC Solutions (EthosCE)	13	22
Educadium (EasyCampus)	—	—
iCohere (iCohere)	12	200
InReach(InReach CEMS)	150	200
Interactyx (TOPYX)	10	150
Latitude Learning (Latitude Learning LMS)	7	2,000
LearnSomething (Learner Community)	6	12
Meridian Knowledge Solutions (Meridian Global)	16	350
Neovation (SmarterU.com)	5	50
Peach New Media (Freestone)	200	225
Starfield Talent Management Solutions (Starfield)	1	25
Thinking Cap (Thinking Cap LMS)	6	25
WBT Systems (TopClass)	17	102
Web Courseworks (CourseStage)	21	47

IMPLEMENTATIONS BY INDIVIDUAL MEMBERS IN THE ASSOCIATION

12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?

	1,000 or less	1,001 to 5,000	5,001 to 10,000	10,001 to 25,000	25,001 to 50,000	50,001 to 100,000	More than 100,000
Avilar (WebMentor LMS)	25%	25%	0%	25%	0%	0%	25%
Blackboard (Blackboard Learn)	75%	10%	5%	10%	0%	0%	0%
BlueVolt (BlueVolt)	—	—	—	—	—	—	—
CommPartners (MemberSight Community)	0%	50%	0%	50%	0%	0%	0%
Digital Ignite (Crowd Wisdom)	0%	5%	15%	15%	25%	15%	25%
Digitec Interactive (Knowledge Direct)	3%	21%	18%	28%	18%	9%	3%
DLC Solutions (EthosCE)	0%	12%	50%	0%	0%	13%	25%
Educadium (EasyCampus)	5%	30%	25%	25%	10%	5%	0%
iCohere (iCohere)	10%	15%	20%	20%	20%	10%	5%
InReach(InReach CEMS)	2%	10%	20%	40%	20%	5%	3%
Interactyx (TOPYX)	0%	50%	0%	0%	0%	0%	50%
Latitude Learning (Latitude Learning LMS)	0%	0%	0%	50%	50%	0%	0%
LearnSomething (Learner Community)	0%	0%	50%	0%	25%	25%	0%
Meridian Knowledge Solutions (Meridian Global)	0%	0%	0%	25%	25%	25%	25%
Neovation (SmarterU.com)	30%	60%	10%	0%	0%	0%	0%
Peach New Media (Freestone)	5%	5%	30%	20%	20%	15%	5%
Starfield Talent Management Solutions (Starfield)	NA	NA	NA	NA	NA	NA	NA
Thinking Cap (Thinking Cap LMS)	—	—	—	—	—	—	—
WBT Systems (TopClass)	0%	6%	29%	29%	24%	6%	6%
Web Courseworks (CourseStage)	14%	7%	14%	37%	14%	7%	7%

LMS Implementation

IMPLEMENTATION IN CALENDAR DAYS

1. In *calendar days*, how long do complex, typical, and simple client implementations of the LMS usually take?

	Complex	Typical	Simple
Avilar (WebMentor LMS)	5	2	1
Blackboard (Blackboard Learn)	90	28	7
BlueVolt (BlueVolt)	120	60	30
CommPartners (MemberSight Community)	120	60	30
Digital Ignite (Crowd Wisdom)	120	90	45
Digitec Interactive (Knowledge Direct)	70	28	14
DLC Solutions (EthosCE)	120	60	21
Educadium (EasyCampus)	60	30	1
iCohere (iCohere)	90	30	10
InReach(InReach CEMS)	45	30	14
Interactyx (TOPYX)	180	49	21
Latitude Learning (Latitude Learning LMS)	180	30	1
LearnSomething (Learner Community)	90	90	60
Meridian Knowledge Solutions (Meridian Global)	120	90	30
Neovation (SmarterU.com)	90	30	1

	Complex	Typical	Simple
Peach New Media (Freestone)	45	20	1
Starfield Talent Management Solutions (Starfield)	90	60	30
Thinking Cap (Thinking Cap LMS)	120	30	7
WBT Systems (TopClass)	180	90	30
Web Courseworks (CourseStage)	120	60	30
<i>Average</i>	102.8	48.4	19.2

Pricing

We asked vendors to include in their pricing all costs paid to the company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

FIRST-YEAR COST FOR COMPANY-HOSTED LMS

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*.

	500	2,500	5,000	10,000	25,000	Unlimited
Avilar (WebMentor LMS)	\$8,000	\$15,000	\$22,500	\$30,000	\$40,000	\$50,000
Blackboard (Blackboard Learn)	\$65,000	\$130,000	\$190,000	\$225,000	\$285,000	NA
BlueVolt (BlueVolt)	—	—	—	—	—	—
CommPartners (MemberSight Community)	\$4,400	\$6,600	\$9,000	\$13,000	\$17,000	\$20,000
Digital Ignite (Crowd Wisdom)	\$14,000	\$38,000	\$75,000	\$122,000	\$181,000	—
Digitec Interactive (Knowledge Direct)	\$17,400	\$32,400	\$47,400	\$72,400	\$97,400	—
DLC Solutions (EthosCE)	\$33,000	\$33,000	\$33,000	\$33,000	\$33,000	\$33,000
Educadium (EasyCampus)	\$6,814	—	—	—	—	—
iCohere (iCohere)	\$20,000	\$40,000	\$60,000	\$80,000	\$100,000	—
InReach(InReach CEMS)	—	—	—	—	—	—
Interactyx (TOPYX)	\$19,500	\$19,500	\$19,500	\$19,500	\$19,500	\$19,500
Latitude Learning (Latitude Learning LMS)	\$3,000	\$12,500	\$22,000	\$40,000	\$75,000	—
LearnSomething (Learner Community)	\$43,500	\$57,750	\$69,750	\$86,250	\$113,500	\$188,500
Meridian Knowledge Solutions (Meridian Global)	\$30,000	\$60,000	\$75,000	\$100,000	\$150,000	—
Neovation (SmarterU.com)	\$3,500	\$10,000	\$13,000	\$16,000	\$30,000	\$50,000
Peach New Media (Freestone)	—	—	—	—	—	—
Starfield Talent Management Solutions (Starfield)	—	—	—	—	—	—
Thinking Cap (Thinking Cap LMS)	\$27,500	\$27,500	\$39,000	\$66,000	\$135,000	\$135,000
WBT Systems (TopClass)	\$38,400	\$62,000	\$86,000	\$116,000	\$150,000	—
Web Courseworks (CourseStage)	\$24,000	\$38,000	\$49,750	\$60,000	\$100,000	—
<i>Average</i>	\$22,376	\$38,817	\$54,060	\$71,943	\$101,760	\$70,857

CUMULATIVE THREE-YEAR COST FOR COMPANY-HOSTED LMS

2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question).

	500	2,500	5,000	10,000	25,000	Unlimited
Avilar (WebMentor LMS)	\$11,200	\$21,000	\$31,500	\$42,000	\$56,000	\$70,000
Blackboard (Blackboard Learn)	\$100,000	\$290,000	\$370,000	\$575,000	\$755,000	NA
BlueVolt (BlueVolt)	—	—	—	—	—	—
CommPartners (MemberSight Community)	\$9,000	\$13,000	\$16,000	\$19,000	\$27,000	\$34,000

	500	2,500	5,000	10,000	25,000	Unlimited
Digital Ignite (Crowd Wisdom)	\$26,000	\$98,000	\$193,000	\$290,000	\$395,000	—
Digitec Interactive (Knowledge Direct)	\$42,200	\$87,200	\$132,200	\$207,200	\$282,200	—
DLC Solutions (EthosCE)	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000
Educadium (EasyCampus)	\$10,628	—	—	—	—	—
iCohere (iCohere)	\$60,000	\$120,000	\$180,000	\$240,000	\$300,000	—
InReach(InReach CEMS)	—	—	—	—	—	—
Interactyx (TOPYX)	\$58,500	\$58,500	\$58,500	\$58,500	\$58,500	\$58,500
Latitude Learning (Latitude Learning LMS)	\$6,000	\$27,500	\$52,000	\$90,000	\$175,000	—
LearnSomething (Learner Community)	\$73,500	\$116,250	\$152,250	\$201,750	\$283,500	\$508,500
Meridian Knowledge Solutions (Meridian Global)	\$55,000	\$80,000	\$140,000	\$210,000	\$260,000	—
Neovation (SmarterU.com)	\$10,500	\$30,000	\$36,000	\$48,000	\$90,000	\$150,000
Peach New Media (Freestone)	—	—	—	—	—	—
Starfield Talent Management Solutions (Starfield)	—	—	—	—	—	—
Thinking Cap (Thinking Cap LMS)	\$57,500	\$57,500	\$87,000	\$138,000	\$255,000	\$255,000
WBT Systems (TopClass)	\$65,200	\$106,000	\$189,000	\$237,000	\$290,000	—
Web Courseworks (CourseStage)	\$36,000	\$72,000	\$97,250	\$139,000	\$225,000	—
Average	\$43,889	\$83,863	\$121,047	\$171,763	\$235,547	\$165,286

FIRST-YEAR COST FOR CLIENT-HOSTED LMS

3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*.

	500	2,500	5,000	10,000	25,000	Unlimited
Avilar (WebMentor LMS)	\$12,000	\$30,000	\$45,000	\$60,000	\$90,000	\$120,000
Blackboard (Blackboard Learn)	\$35,000	\$85,000	\$104,000	\$123,000	\$136,000	NA
BlueVolt (BlueVolt)	NA	NA	NA	NA	NA	NA
CommPartners (MemberSight Community)	NA	NA	NA	NA	NA	NA
Digital Ignite (Crowd Wisdom)	NA	NA	NA	NA	NA	NA
Digitec Interactive (Knowledge Direct)	NA	NA	NA	NA	NA	NA
DLC Solutions (EthosCE)	\$88,000	\$88,000	\$88,000	\$88,000	\$88,000	\$88,000
Educadium (EasyCampus)	NA	NA	NA	NA	NA	NA
iCohere (iCohere)	\$60,000	\$120,000	\$180,000	\$240,000	\$300,000	—
InReach(InReach CEMS)	NA	NA	NA	NA	NA	NA
Interactyx (TOPYX)	NA	NA	NA	NA	NA	NA
Latitude Learning (Latitude Learning LMS)	\$19,500	\$19,500	\$19,500	\$19,500	\$19,500	\$19,500
LearnSomething (Learner Community)	NA	NA	NA	NA	NA	NA
Meridian Knowledge Solutions (Meridian Global)	\$50,000	\$80,000	\$140,000	\$210,000	\$260,000	—
Neovation (SmarterU.com)	NA	NA	NA	NA	NA	NA
Peach New Media (Freestone)	NA	NA	NA	NA	NA	NA
Starfield Talent Management Solutions (Starfield)	NA	NA	NA	NA	NA	NA
Thinking Cap (Thinking Cap LMS)	\$50,000	\$50,000	\$75,000	\$120,000	\$225,000	\$225,000
WBT Systems (TopClass)	\$30,000	\$50,000	\$68,000	\$92,000	\$120,000	—
Web Courseworks (CourseStage)	NA	NA	NA	NA	NA	NA
Average	\$43,063	\$65,313	\$89,938	\$119,063	\$154,813	\$113,125

CUMULATIVE THREE-YEAR FOR CLIENT-HOSTED LMS

4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question).

	500	2,500	5,000	10,000	25,000	Unlimited
Avilar (WebMentor LMS)	\$28,800	\$72,000	\$108,000	\$144,000	\$216,000	\$288,000
Blackboard (Blackboard Learn)	\$108,500	\$263,500	\$322,400	\$381,300	\$421,600	NA
BlueVolt (BlueVolt)	NA	NA	NA	NA	NA	NA
CommPartners (MemberSight Community)	NA	NA	NA	NA	NA	NA
Digital Ignite (Crowd Wisdom)	NA	NA	NA	NA	NA	NA
Digitec Interactive (Knowledge Direct)	NA	NA	NA	NA	NA	NA
DLC Solutions (EthosCE)	\$128,000	\$128,000	\$128,000	\$128,000	\$128,000	\$128,000
Educadium (EasyCampus)	NA	NA	NA	NA	NA	NA
iCohere (iCohere)	\$80,000	\$144,000	\$215,000	\$300,000	\$350,000	—
InReach(InReach CEMS)	NA	NA	NA	NA	NA	NA
Interactyx (TOPYX)	NA	NA	NA	NA	NA	NA
Latitude Learning (Latitude Learning LMS)	\$19,500	\$19,500	\$19,500	\$19,500	\$19,500	\$19,500
LearnSomething (Learner Community)	NA	NA	NA	NA	NA	NA
Meridian Knowledge Solutions (Meridian Global)	\$60,000	\$125,000	\$145,000	\$285,000	\$345,000	—
Neovation (SmarterU.com)	NA	NA	NA	NA	NA	NA
Peach New Media (Freestone)	NA	NA	NA	NA	NA	NA
Starfield Talent Management Solutions (Starfield)	NA	NA	NA	NA	NA	NA
Thinking Cap (Thinking Cap LMS)	\$61,250	\$61,250	\$93,000	\$147,000	\$270,000	\$270,000
WBT Systems (TopClass)	\$40,000	\$70,000	\$135,000	\$165,000	\$200,000	—
Web Courseworks (CourseStage)	NA	NA	NA	NA	NA	NA
<i>Average</i>	<i>\$65,756</i>	<i>\$110,406</i>	<i>\$145,738</i>	<i>\$196,225</i>	<i>\$243,763</i>	<i>\$176,375</i>

Integration and Interoperability

EXPERIENCE WITH INTEGRATIONS IN GENERAL

1. What percentage of client implementations involve at least one integration?

	Integrations
Avilar (WebMentor LMS)	20%
Blackboard (Blackboard Learn)	50%
BlueVolt (BlueVolt)	15%
CommPartners (MemberSight Community)	80%
Digital Ignite (Crowd Wisdom)	100%
Digitec Interactive (Knowledge Direct)	90%
DLC Solutions (EthosCE)	65%
Educadium (EasyCampus)	—
iCohere (iCohere)	5%
InReach(InReach CEMS)	25%
Interactyx (TOPYX)	60%
Latitude Learning (Latitude Learning LMS)	10%
LearnSomething (Learner Community)	90%
Meridian Knowledge Solutions (Meridian Global)	90%
Neovation (SmarterU.com)	20%

	Integrations
Peach New Media (Freestone)	80%
Starfield Talent Management Solutions (Starfield)	90%
Thinking Cap (Thinking Cap LMS)	80%
WBT Systems (TopClass)	90%
Web Courseworks (CourseStage)	62%

EXPERIENCE INTEGRATING WITH WEBINAR SYSTEMS

5. With which of the following Webinar systems has the LMS been integrated for a client implementation?

	Adobe Connect	Illuminate	Genesys	GoToWebinar	Microsoft Live Meeting	ReadyTalk	WebEx	Completely custom (non-commercial) Webinar system	The LMS has never been integrated with a Webinar system.	Other
Avilar (WebMentor LMS)			✓	✓	✓	✓	✓	✓		
Blackboard (Blackboard Learn)	✓	✓	✓	✓	✓	✓	✓			Blackboard Collaborate (Wimba and Illuminate)
BlueVolt (BlueVolt)	✓									
CommPartners (MemberSight Community)										CommPartners own Webinar platforms
Digital Ignite (Crowd Wisdom)	✓			✓			✓			
Digitec Interactive (Knowledge Direct)		✓		✓		✓	✓			PictureTalk, Meeting Bridge
DLC Solutions (EthosCE)										Talkpoint
Educadium (EasyCampus)	✓			✓			✓			Big Blue Button, WizIQ
iCohere (iCohere)										iCohere's own Webinar platform
InReach(InReach CEMS)								✓		
Interactyx (TOPYX)	✓			✓	✓		✓			WizIQ
Latitude Learning (Latitude Learning LMS)				✓	✓		✓			Centra
LearnSomething (Learner Community)										Any Webinar system

	Adobe Connect	Illuminate	Genesys	GoToWebinar	Microsoft Live Meeting	ReadyTalk	WebEx	Completely custom (non-commercial) Webinar system	The LMS has never been integrated with a Webinar system.	Other
Meridian Knowledge Solutions (Meridian Global)	✓				✓		✓			Centra, Interwise
Neovation (SmarterU.com)				✓			✓			
Peach New Media (Freestone)	✓		✓	✓	✓	✓	✓	✓		
Starfield Talent Management Solutions (Starfield)										Any Webinar system
Thinking Cap (Thinking Cap LMS)		✓					✓			
WBT Systems (TopClass)	✓				✓		✓			Centra
Web Courseworks (CourseStage)	✓	✓					✓	✓		Wimba, CommPartners

EXPERIENCE INTEGRATING WITH ASSOCIATION MANAGEMENT SYSTEMS

6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?

Eight companies provided responses in the “Other” field.

- Blackboard wrote, “Blackboard can technically integrate with any of these systems. The integration is done at the database level and our clients have done hundreds of integrations to Oracle and SQL Server based systems.”
- CommPartners wrote, “CommPartners provides a standalone learning content management platform that has been integrated with 7 different AMS’s. MemberSight is the product of integrating LCMS with the best functions of a social CRM. Therefore, MemberSight can be integrated with just about any AMS.”
- Digital Ignite wrote, “Custom databases and Oracle.”
- Educadium wrote, “AMS integration projects available upon request.”
- Interactyx wrote, “I4A, Workday.”
- LearnSomething wrote, “yourmembership.com, i4a.”
- Peach New Media wrote, “YourMembership, MemberClicks.”
- Starfield Talent Management Solutions wrote, “Starfield integrates with several HRIS systems via regular data feeds. Likewise, Starfield could integrate with an AMS. Starfield offers the ability to conduct regular uploads via FTP. Starfield has a standard file layout template that we use to map against clients’ current data. Once loaded, administrators have full access to modify general member information (members can also be added manually by the administrator).”

	Apify (Apify)	Association Anywhere (ACGI)	ClearVantage (Etclid)	CRM for Members (ProTech)	iMIS (Advanced Systems International)	Members360 (Affiniscape)	netFORUM (Avectra)	Personify (TMA Resources)	TIMSS (TMA Resources)	Completely custom (non-commercial) AMS	The LMS has never been integrated with an AMS.
Avilar (WebMentor LMS)										➤	
Blackboard (Blackboard Learn)	➤				➤			➤	➤		
BlueVolt (BlueVolt)											➤
CommPartners (MemberSight Community)	➤	➤	➤	➤	➤		➤	➤			
Digital Ignite (Crowd Wisdom)	➤	➤		➤	➤	➤	➤	➤	➤	➤	
Digitec Interactive (Knowledge Direct)		➤			➤		➤	➤		➤	
DLC Solutions (EthosCE)		➤			➤		➤			➤	
Educadium (EasyCampus)			➤							➤	
iCohere (iCohere)										➤	
InReach(InReach CEMS)	➤				➤		➤				
Interactyx (TOPYX)			➤		➤		➤			➤	
Latitude Learning (Latitude Learning LMS)										➤	
LearnSomething (Learner Community)		➤		➤	➤		➤	➤	➤	➤	
Meridian Knowledge Solutions (Meridian Global)	➤		➤				➤	➤		➤	
Neovation (SmarterU.com)										➤	
Peach New Media (Freestone)	➤	➤		➤	➤	➤	➤	➤	➤	➤	
Starfield Talent Management Solutions (Starfield)											
Thinking Cap (Thinking Cap LMS)										➤	
WBT Systems (TopClass)					➤		➤				
Web Courseworks (CourseStage)	➤		➤		➤		➤	➤	➤		

Standards and Guidelines

PLAYING STANDARDS-BASED CONTENT

2. Can the LMS play content that conforms to guidelines or standards? Select all that apply.

	AICC	IMS	Medbiquitous	SCORM 1.1	SCORM 1.2	SCORM 2004	None
Avilar (WebMentor LMS)	✓	✓		✓	✓	✓	
Blackboard (Blackboard Learn)	✓	✓		✓	✓	✓	
BlueVolt (BlueVolt)	✓				✓	✓	
CommPartners (MemberSight Community)	✓			✓	✓	✓	
Digital Ignite (Crowd Wisdom)	✓	✓	✓	✓	✓	✓	
Digitec Interactive (Knowledge Direct)			✓		✓		
DLC Solutions (EthosCE)	✓				✓		
Educadium (EasyCampus)	✓	✓		✓	✓	✓	
iCohere (iCohere)							✓
InReach(InReach CEMS)							✓
Interactyx (TOPYX)					✓	✓	
Latitude Learning (Latitude Learning LMS)				✓	✓	✓	
LearnSomething (Learner Community)	✓				✓	✓	
Meridian Knowledge Solutions (Meridian Global)	✓	✓	✓	✓	✓	✓	
Neovation (SmarterU.com)					✓	✓	
Peach New Media (Freestone)				✓	✓	✓	
Starfield Talent Management Solutions (Starfield)	✓				✓		
Thinking Cap (Thinking Cap LMS)					✓	✓	
WBT Systems (TopClass)	✓				✓		
Web Courseworks (CourseStage)			✓	✓	✓	✓	

Hosting

ABILITY FOR CLIENT TO HOST

3. Is the LMS available as a *client-hosted* solution?

	Client hosting?
Avilar (WebMentor LMS)	Yes
Blackboard (Blackboard Learn)	Yes
BlueVolt (BlueVolt)	No
CommPartners (MemberSight Community)	No
Digital Ignite (Crowd Wisdom)	No
Digitec Interactive (Knowledge Direct)	No
DLC Solutions (EthosCE)	Yes
Educadium (EasyCampus)	No
iCohere (iCohere)	Yes
InReach(InReach CEMS)	No
Interactyx (TOPYX)	No
Latitude Learning (Latitude Learning LMS)	Yes
LearnSomething (Learner Community)	No
Meridian Knowledge Solutions (Meridian Global)	Yes

	Client hosting?
Neovation (SmarterU.com)	No
Peach New Media (Freestone)	No
Starfield Talent Management Solutions (Starfield)	No
Thinking Cap (Thinking Cap LMS)	Yes
WBT Systems (TopClass)	Yes
Web Courseworks (CourseStage)	No

Personalization

SUPPORT FOR COURSE RECOMMENDATIONS AND CUSTOMIZED CONTENT FOR END USERS

4. Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?

	Recommend courses?	Customize site content?
Avilar (WebMentor LMS)	Yes	Yes
Blackboard (Blackboard Learn)	Yes	Yes
BlueVolt (BlueVolt)	Yes	Yes
CommPartners (MemberSight Community)	Yes	Yes
Digital Ignite (Crowd Wisdom)	Yes	Yes
Digitec Interactive (Knowledge Direct)	Yes	Yes
DLC Solutions (EthosCE)	Yes	Yes
Educadium (EasyCampus)	Yes	Yes
iCohere (iCohere)	No	No
InReach(InReach CEMS)	Yes	Yes
Interactyx (TOPYX)	Yes	Yes
Latitude Learning (Latitude Learning LMS)	Yes	Yes
LearnSomething (Learner Community)	No	No
Meridian Knowledge Solutions (Meridian Global)	Yes	Yes
Neovation (SmarterU.com)	No	No
Peach New Media (Freestone)	Yes	Yes
Starfield Talent Management Solutions (Starfield)	Yes	Yes
Thinking Cap (Thinking Cap LMS)	Yes	No
WBT Systems (TopClass)	Yes	Yes
Web Courseworks (CourseStage)	No	Yes

Interface Customization

ABILITY TO BRAND INTERFACE

1. Are the branding and look and feel for the *end-user* view of the LMS customizable?
2. Are the branding and look and feel for the *administrator* view of the LMS customizable?

	Brandable end-user view?	Brandable administrator view?
Avilar (WebMentor LMS)	Yes	Yes
Blackboard (Blackboard Learn)	Yes	Yes
BlueVolt (BlueVolt)	Yes	No
CommPartners (MemberSight Community)	Yes	Yes
Digital Ignite (Crowd Wisdom)	Yes	No
Digitec Interactive (Knowledge Direct)	Yes	Yes
DLC Solutions (EthosCE)	Yes	Yes
Educadium (EasyCampus)	Yes	Yes
iCohere (iCohere)	Yes	No
InReach(InReach CEMS)	Yes	Yes
Interactyx (TOPYX)	Yes	Yes
Latitude Learning (Latitude Learning LMS)	Yes	Yes
LearnSomething (Learner Community)	Yes	No
Meridian Knowledge Solutions (Meridian Global)	Yes	Yes
Neovation (SmarterU.com)	Yes	Yes
Peach New Media (Freestone)	Yes	Yes
Starfield Talent Management Solutions (Starfield)	Yes	Yes
Thinking Cap (Thinking Cap LMS)	Yes	Yes
WBT Systems (TopClass)	Yes	Yes
Web Courseworks (CourseStage)	Yes	Yes

Personalization and Internationalization and Localization

SUPPORT FOR LANGUAGES

These questions come from the Personalization section:

2. Can end users specify their preferred language (which may differ from the default site language)?
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?

These questions come from the International and Localization section:

3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
8. In how many languages has the LMS been implemented for clients?

	Number of languages	End users specify language?	Language changes dynamically?	Multibyte characters?	Right-to-left languages?
Avilar (WebMentor LMS)	2	Yes	Yes	Yes	No
Blackboard (Blackboard Learn)	18	Yes	Yes	Yes	Yes
BlueVolt (BlueVolt)	10	Yes	Yes	Yes	No
CommPartners (MemberSight Community)	1	Yes	Yes	Yes	No
Digital Ignite (Crowd Wisdom)	1	Yes	Yes	Yes	Yes
Digitec Interactive (Knowledge Direct)	9	Yes	Yes	Yes	No
DLC Solutions (EthosCE)	1	Yes	Yes	Yes	Yes
Educadium (EasyCampus)	—	Yes	Yes	Yes	Yes
iCohere (iCohere)	5	Yes	Yes	No	No
InReach(InReach CEMS)	1	No	NA	No	No

	Number of languages	End users specify language?	Language changes dynamically?	Multibyte characters?	Right-to-left languages?
Interactyx (TOPYX)	14	Yes	Yes	Yes	No
Latitude Learning (Latitude Learning LMS)	13	Yes	Yes	Yes	Yes
LearnSomething (Learner Community)	1	No	NA	Yes	No
Meridian Knowledge Solutions (Meridian Global)	28	Yes	Yes	Yes	Yes
Neovation (SmarterU.com)	4	Yes	Yes	Yes	Yes
Peach New Media (Freestone)	1	No	NA	No	No
Starfield Talent Management Solutions (Starfield)	11	Yes	Yes	Yes	No
Thinking Cap (Thinking Cap LMS)	9	Yes	Yes	Yes	No
WBT Systems (TopClass)	18	Yes	Yes	Yes	No
Web Courseworks (CourseStage)	3	Yes	Yes	Yes	Yes

Authoring, Managing, and Displaying Learning Content

AUTHORING, WORD AND POWERPOINT CONTENT, AND DIGITAL RIGHTS

3. Does the LMS provide the ability to author learning content?
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?

	Ability to author learning content	Repurpose Word content	Repurpose PowerPoint content	Digital rights management
Avilar (WebMentor LMS)	Standard	Semi-standard	Third-party	Unavailable
Blackboard (Blackboard Learn)	Standard	Standard	Standard	Semi-standard
BlueVolt (BlueVolt)	Standard	Standard	Standard	Standard
CommPartners (MemberSight Community)	Semi-standard	Standard	Unavailable	Standard
Digital Ignite (Crowd Wisdom)	Standard	Third-party	Third-party	Unavailable
Digitec Interactive (Knowledge Direct)	Standard	Unavailable	Standard	Unavailable
DLC Solutions (EthosCE)	Standard	Third-party	Semi-standard	Third-party
Educadium (EasyCampus)	Semi-standard	Semi-standard	Semi-standard	Third-party
iCohere (iCohere)	Standard	Completely custom	Completely custom	Third-party
InReach(InReach CEMS)	Standard	Standard	Standard	Semi-standard
Interactyx (TOPYX)	Standard	Standard	Standard	Standard
Latitude Learning (Latitude Learning LMS)	Semi-standard	Completely custom	Third-party	Completely custom
LearnSomething (Learner Community)	Standard	Standard	Third-party	Standard
Meridian Knowledge Solutions (Meridian Global)	Standard	Standard	Standard	Standard
Neovation (SmarterU.com)	Standard	Standard	Third-party	Standard
Peach New Media (Freestone)	Standard	Standard	Standard	Standard
Starfield Talent Management Solutions (Starfield)	Unavailable	Unavailable	Unavailable	Unavailable
Thinking Cap (Thinking Cap LMS)	Unavailable	Unavailable	Standard	Unavailable
WBT Systems (TopClass)	Standard	Standard	Standard	Semi-standard
Web Courseworks (CourseStage)	Standard	Semi-standard	Semi-standard	Completely custom

In-person, Place-based Courses

MANAGING IN-PERSON, PLACE-BASED COURSES

- Which management options does the LMS provide for in-person, place-based courses?
 - Administrative calendar for courses
 - End user calendar for viewing course options and schedules
 - Waitlisting
 - Personnel management (for scheduling instructors and facilitators)
 - Facility management (for scheduling rooms)
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
 - Automatic e-mail messaging and notification to end users
 - Automatic e-mail message and notification to administrators
 - Customizable e-mail messages and notifications to users
 - Customizable e-mail messages and notifications to administrators

	Administrative calendar	End-user calendar	Waitlisting	Personnel management	Facility management	Equipment and resource management
Avilar (WebMentor LMS)	Standard	Standard	Standard	Standard	Standard	Standard
Blackboard (Blackboard Learn)	Standard	Standard	Third-party	Standard	Third-party	Third-party
BlueVolt (BlueVolt)	Standard	Third-party	Completely custom	Standard	Standard	Standard
CommPartners (MemberSight Community)	Third-party	Standard	Third-party	Standard	Third-party	Third-party
Digital Ignite (Crowd Wisdom)	Third-party	Standard	Standard	Completely custom	Completely custom	Completely custom
Digitec Interactive (Knowledge Direct)	Unavailable	Standard	Unavailable	Third-party	Third-party	Third-party
DLC Solutions (EthosCE)	Standard	Standard	Semi-standard	Third-party	Third-party	Third-party
Educadium (EasyCampus)	Standard	Semi-standard	Third-party	Unavailable	Unavailable	Unavailable
iCohere (iCohere)	Standard	Unavailable	Semi-standard	Completely custom	Completely custom	Completely custom
InReach(InReach CEMS)	Standard	Standard	Standard	Third-party	Third-party	Third-party
Interactyx (TOPYX)	Standard	Standard	Standard	Unavailable	Unavailable	Unavailable
Latitude Learning (Latitude Learning LMS)	Standard	Standard	Standard	Standard	Standard	Standard
LearnSomething (Learner Community)	Standard	Standard	Standard	Standard	Unavailable	Unavailable
Meridian Knowledge Solutions (Meridian Global)	Standard	Standard	Standard	Standard	Standard	Standard
Neovation (SmarterU.com)	Unavailable	Standard	Unavailable	Semi-standard	Unavailable	Unavailable
Peach New Media (Freestone)	Completely custom	Standard	Unavailable	Standard	Standard	Standard
Starfield Talent Management Solutions (Starfield)	Standard	Standard	Standard	Standard	Standard	Unavailable

	Administrative calendar	End-user calendar	Waitlisting	Personnel management	Facility management	Equipment and resource management
Thinking Cap (Thinking Cap LMS)	Standard	Standard	Standard	Completely custom	Unavailable	Unavailable
WBT Systems (TopClass)	Standard	Completely custom	Standard	Standard	Standard	Standard
Web Courseworks (CourseStage)	Standard	Standard	Standard	Completely custom	Standard	Completely custom

Webinars

INTEGRATED WEBINAR FUNCTIONALITY

1. Does the LMS provide integrated Webinar functionality?

	Integrated Webinar functionality
Avilar (WebMentor LMS)	Third-party
Blackboard (Blackboard Learn)	Standard
BlueVolt (BlueVolt)	Standard
CommPartners (MemberSight Community)	Standard
Digital Ignite (Crowd Wisdom)	Standard
Digitec Interactive (Knowledge Direct)	Standard
DLC Solutions (EthosCE)	Third-party
Educadium (EasyCampus)	Semi-standard
iCohere (iCohere)	Standard
InReach(InReach CEMS)	Standard
Interactyx (TOPYX)	Standard
Latitude Learning (Latitude Learning LMS)	Standard
LearnSomething (Learner Community)	Semi-standard
Meridian Knowledge Solutions (Meridian Global)	Standard
Neovation (SmarterU.com)	Third-party
Peach New Media (Freestone)	Standard
Starfield Talent Management Solutions (Starfield)	Unavailable
Thinking Cap (Thinking Cap LMS)	Third-party
WBT Systems (TopClass)	Standard
Web Courseworks (CourseStage)	Semi-standard

Registration

REGISTRATION OPTIONS

1. How can end users be registered in the LMS?
 - By self-registration
 - By registration code or key
 - By an administrator registering end users one by one
 - By an administrator performing a bulk upload
 - As the result of an e-commerce purchase
 - By self-registration with administrator approval

	Self-registration	Registration code or key	Administrator registering one by one	Administrator performing a bulk upload	E-commerce purchase	Self-registration with administrator approval
Avilar (WebMentor LMS)	✓	✓	✓	✓	✓	✓
Blackboard (Blackboard Learn)	✓	✓	✓	✓	✓	✓
BlueVolt (BlueVolt)	✓	✓	✓	✓		
CommPartners (MemberSight Community)	✓	✓		✓	✓	✓
Digital Ignite (Crowd Wisdom)	✓	✓	✓	✓	✓	✓
Digitec Interactive (Knowledge Direct)	✓	✓	✓	✓	✓	✓
DLC Solutions (EthosCE)	✓	✓	✓	✓	✓	✓
Educadium (EasyCampus)	✓	✓	✓	✓	✓	✓
iCohere (iCohere)	✓	✓	✓	✓	✓	✓
InReach(InReach CEMS)	✓	✓	✓	✓	✓	✓
Interactyx (TOPYX)	✓	✓	✓	✓	✓	✓
Latitude Learning (Latitude Learning LMS)	✓	✓	✓	✓	✓	✓
LearnSomething (Learner Community)	✓	✓	✓	✓		
Meridian Knowledge Solutions (Meridian Global)	✓		✓	✓	✓	✓
Neovation (SmarterU.com)	✓		✓	✓	✓	
Peach New Media (Freestone)	✓	✓	✓	✓	✓	
Starfield Talent Management Solutions (Starfield)		✓	✓	✓		
Thinking Cap (Thinking Cap LMS)	✓		✓	✓	✓	✓
WBT Systems (TopClass)	✓		✓	✓	✓	✓
Web Courseworks (CourseStage)	✓	✓	✓	✓	✓	✓

Enrollment

ENROLLMENT OPTIONS

- How can end users be enrolled in the LMS?
 - By self-enrollment
 - By enrollment code or key
 - By an administrator enrolling registering end users one by one
 - By an administrator performing a bulk upload
 - As the result of an e-commerce purchase
 - By self-enrollment with administrator approval

	Self-enrollment	Enrollment code or key	Administrator enrolling one by one	Administrator performing a bulk upload	E-commerce purchase	Self-enrollment with administrator approval
Avilar (WebMentor LMS)	✓		✓	✓	✓	✓
Blackboard (Blackboard Learn)	✓	✓	✓	✓	✓	✓
BlueVolt (BlueVolt)	✓	✓	✓	✓	✓	✓
CommPartners (MemberSight Community)	✓	✓	✓	✓	✓	✓
Digital Ignite (Crowd Wisdom)	✓	✓	✓	✓	✓	✓
Digitec Interactive (Knowledge Direct)	✓	✓	✓	✓	✓	✓
DLC Solutions (EthosCE)	✓	✓	✓	✓	✓	✓
Educadium (EasyCampus)	✓	✓	✓	✓	✓	✓
iCohere (iCohere)	✓	✓	✓	✓	✓	✓
InReach(InReach CEMS)	✓		✓	✓	✓	✓
Interactyx (TOPYX)	✓	✓	✓	✓	✓	✓
Latitude Learning (Latitude Learning LMS)	✓		✓	✓	✓	✓
LearnSomething (Learner Community)	✓	✓	✓	✓	✓	✓
Meridian Knowledge Solutions (Meridian Global)	✓		✓	✓	✓	✓
Neovation (SmarterU.com)	✓		✓	✓	✓	
Peach New Media (Freestone)	✓	✓	✓	✓	✓	✓
Starfield Talent Management Solutions (Starfield)	✓	✓	✓	✓		✓
Thinking Cap (Thinking Cap LMS)	✓		✓	✓	✓	✓
WBT Systems (TopClass)	✓		✓	✓	✓	✓
Web Courseworks (CourseStage)	✓	✓	✓	✓	✓	✓

Managing Continuing Education and Certification

SIMPLE AND COMPLEX CREDIT SCENARIOS

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?

	Simple credit scenarios?	Complex credit scenarios?
Avilar (WebMentor LMS)	Yes	Yes
Blackboard (Blackboard Learn)	No	No
BlueVolt (BlueVolt)	Yes	No
CommPartners (MemberSight Community)	Yes	No
Digital Ignite (Crowd Wisdom)	Yes	Yes
Digitec Interactive (Knowledge Direct)	Yes	Yes
DLC Solutions (EthosCE)	Yes	Yes
Educadium (EasyCampus)	Yes	No
iCohere (iCohere)	Yes	Yes
InReach(InReach CEMS)	Yes	Yes
Interactyx (TOPYX)	Yes	Yes
Latitude Learning (Latitude Learning LMS)	Yes	No
LearnSomething (Learner Community)	Yes	Yes
Meridian Knowledge Solutions (Meridian Global)	Yes	Yes
Neovation (SmarterU.com)	No	No
Peach New Media (Freestone)	Yes	Yes
Starfield Talent Management Solutions (Starfield)	Yes	No
Thinking Cap (Thinking Cap LMS)	Yes	No
WBT Systems (TopClass)	Yes	Yes

TYPES OF LEARNING CONTENT TO WHICH CREDIT CAN BE ASSIGNED

- To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS)
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS)
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement)
 - The LMS does not allow credit to be assigned to learning content.

	Delivered by LMS	Prior knowledge; not delivered	No prior knowledge; not delivered	No credit can be assigned
Avilar (WebMentor LMS)	✓	✓	✓	
Blackboard (Blackboard Learn)				✓
BlueVolt (BlueVolt)	✓	✓	✓	
CommPartners (MemberSight Community)	✓	✓	✓	
Digital Ignite (Crowd Wisdom)	✓	✓	✓	
Digitec Interactive (Knowledge Direct)	✓	✓	✓	
DLC Solutions (EthosCE)	✓	✓	✓	
Educadium (EasyCampus)	✓	✓	✓	
iCohere (iCohere)	✓	✓	✓	
InReach(InReach CEMS)	✓	✓		
Interactyx (TOPYX)	✓	✓	✓	
Latitude Learning (Latitude Learning LMS)	✓	✓		
LearnSomething (Learner Community)	✓			
Meridian Knowledge Solutions (Meridian Global)	✓	✓	✓	
Neovation (SmarterU.com)				✓
Peach New Media (Freestone)	✓	✓		

	Delivered by LMS	Prior knowledge; not delivered	No prior knowledge; not delivered	No credit can be assigned
Starfield Talent Management Solutions (Starfield)	✓	✓	✓	
Thinking Cap (Thinking Cap LMS)	✓	✓		
WBT Systems (TopClass)	✓	✓	✓	
Web Courseworks (CourseStage)	✓	✓		

Assessments

ASSESSMENT FEATURES

7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
8. Does the LMS automatically link assessment data to the performance reports available in the system?
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?

	Compare to aggregate score?	Link data to reports?	Refer end users to particular content?	Ability to specify number of completions?	Create question pools?	Create question banks?	Copy existing assessments?
Avilar (WebMentor LMS)	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Blackboard (Blackboard Learn)	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BlueVolt (BlueVolt)	Yes	Yes	Yes	Yes	No	Yes	Yes
CommPartners (MemberSight Community)	No	Yes	No	Yes	No	No	Yes
Digital Ignite (Crowd Wisdom)	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Digitec Interactive (Knowledge Direct)	Yes	Yes	Yes	Yes	Yes	Yes	No
DLC Solutions (EthosCE)	No	Yes	Yes	Yes	Yes	Yes	No
Educadium (EasyCampus)	Yes	Yes	No	Yes	Yes	Yes	Yes
iCohere (iCohere)	No	No	No	No	Yes	Yes	Yes
InReach(InReach CEMS)	No	Yes	No	Yes	—	—	Yes
Interactyx (TOPYX)	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Latitude Learning (Latitude Learning LMS)	No	Yes	Yes	Yes	Yes	Yes	Yes
LearnSomething (Learner Community)	No	Yes	Yes	Yes	Yes	Yes	Yes
Meridian Knowledge Solutions (Meridian Global)	No	Yes	No	Yes	Yes	Yes	Yes
Neovation (SmarterU.com)	No	No	Yes	Yes	Yes	Yes	No
Peach New Media (Freestone)	No	Yes	No	Yes	Yes	Yes	Yes

	Compare to aggregate score?	Link data to reports?	Refer end users to particular content?	Ability to specify number of completions?	Create question pools?	Create question banks?	Copy existing assessments?
Starfield Talent Management Solutions (Starfield)	No	Yes	Yes	Yes	Yes	Yes	No
Thinking Cap (Thinking Cap LMS)	No	Yes	No	Yes	Yes	No	Yes
WBT Systems (TopClass)	No	Yes	No	Yes	Yes	Yes	Yes
Web Courseworks (CourseStage)	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Evaluations

EVALUATION FEATURES

3. Does the LMS automatically link evaluation data to the reports available in the system?
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?

The options in the table below are marked “NA” for Neovation (SmarterU.com) because the platform does not provide the ability to create and deploy evaluations.

	Link data to reports?	For un- and registered end users?	Ability to specify the number of completions?	Create question pools?	Create question banks?	Copy existing evaluations?
Avilar (WebMentor LMS)	Yes	No	Yes	No	No	Yes
Blackboard (Blackboard Learn)	Yes	Yes	Yes	Yes	Yes	Yes
BlueVolt (BlueVolt)	Yes	No	No	No	Yes	Yes
CommPartners (MemberSight Community)	Yes	Yes	Yes	Yes	Yes	Yes
Digital Ignite (Crowd Wisdom)	Yes	Yes	Yes	No	No	Yes
Digitec Interactive (Knowledge Direct)	Yes	Yes	Yes	Yes	Yes	No
DLC Solutions (EthosCE)	Yes		Yes	Yes	Yes	Yes
Educadium (EasyCampus)	Yes	Yes	Yes	Yes	Yes	Yes
iCohere (iCohere)	No	Yes	Yes	No	No	Yes
InReach(InReach CEMS)	Yes	No	Yes	No	No	Yes
Interactyx (TOPYX)	Yes	No	No	Yes	Yes	Yes
Latitude Learning (Latitude Learning LMS)	Yes	No	Yes	Yes	Yes	Yes
LearnSomething (Learner Community)	Yes	No	No	No	No	No
Meridian Knowledge Solutions (Meridian Global)	Yes	Yes	Yes	Yes	Yes	Yes
Neovation (SmarterU.com)	NA	NA	NA	NA	NA	NA
Peach New Media (Freestone)	Yes	No	No	Yes	Yes	Yes

	Link data to reports?	For un- and registered end users?	Ability to specify the number of completions?	Create question pools?	Create question banks?	Copy existing evaluations?
Starfield Talent Management Solutions (Starfield)	Yes	Yes	No	Yes	Yes	No
Thinking Cap (Thinking Cap LMS)	Yes	No	No	No	No	No
WBT Systems (TopClass)	Yes	No	Yes	Yes	Yes	Yes
Web Courseworks (CourseStage)	Yes	No	Yes	Yes	Yes	Yes

Reporting

REPORTING ON ASSESSMENTS

- Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
- Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?

	Question-by-question data for end users?	Item analysis data?
Avilar (WebMentor LMS)	Yes	Yes
Blackboard (Blackboard Learn)	Yes	Yes
BlueVolt (BlueVolt)	Yes	Yes
CommPartners (MemberSight Community)	Yes	No
Digital Ignite (Crowd Wisdom)	Yes	Yes
Digitec Interactive (Knowledge Direct)	Yes	Yes
DLC Solutions (EthosCE)	Yes	Yes
Educadium (EasyCampus)	Yes	No
iCohere (iCohere)	Yes	Yes
InReach(InReach CEMS)	Yes	No
Interactyx (TOPYX)	Yes	Yes
Latitude Learning (Latitude Learning LMS)	Yes	Yes
LearnSomething (Learner Community)	Yes	Yes
Meridian Knowledge Solutions (Meridian Global)	Yes	Yes
Neovation (SmarterU.com)	Yes	Yes
Peach New Media (Freestone)	Yes	No
Starfield Talent Management Solutions (Starfield)	Yes	Yes
Thinking Cap (Thinking Cap LMS)	Yes	Yes
WBT Systems (TopClass)	Yes	Yes
Web Courseworks (CourseStage)	Yes	Yes

HOW REPORTS ARE PROVIDED

- How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports
 - Provides a built-in tool for creating ad-hoc reports
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses)

	Pre-configured reports	Built-in tool for ad-hoc reports	Allows use of standard tools for ad-hoc reports	Create and report on new fields
Avilar (WebMentor LMS)	✓			
Blackboard (Blackboard Learn)	✓		✓	✓
BlueVolt (BlueVolt)	✓	✓		
CommPartners (MemberSight Community)	✓	✓		✓
Digital Ignite (Crowd Wisdom)	✓		✓	✓
Digitec Interactive (Knowledge Direct)	✓	✓		
DLC Solutions (EthosCE)	✓	✓	✓	✓
Educadium (EasyCampus)	✓			
iCohere (iCohere)	✓	✓		
InReach(InReach CEMS)	✓	✓		✓
Interactyx (TOPYX)	✓		✓	✓
Latitude Learning (Latitude Learning LMS)	✓	✓	✓	
LearnSomething (Learner Community)	✓			
Meridian Knowledge Solutions (Meridian Global)	✓	✓	✓	
Neovation (SmarterU.com)	✓			
Peach New Media (Freestone)	✓			
Starfield Talent Management Solutions (Starfield)	✓	✓	✓	✓
Thinking Cap (Thinking Cap LMS)	✓	✓	✓	✓
WBT Systems (TopClass)	✓	✓	✓	✓
Web Courseworks (CourseStage)	✓			✓

Support for Multiple Sites

MULTIPLE-SITE FEATURES AND FUNCTIONALITIES

- How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site).
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not).
 - Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts).
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish).
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site).
 - Each site in a single client implementation can have its own set of customized reports.

	No support for multiple sites	Each site with its own look and feel	Each site with its own features and functionalities	Each site with its own configuration of options	Each site in its own language	Each site with the same master list of courses	Each site with its own set of reports
Avilar (WebMentor LMS)		✓	✓	✓	✓	✓	✓
Blackboard (Blackboard Learn)		✓	✓	✓	✓	✓	✓
BlueVolt (BlueVolt)		✓				✓	
CommPartners (MemberSight Community)	✓						
Digital Ignite (Crowd Wisdom)		✓	✓	✓	✓	✓	✓
Digitec Interactive (Knowledge Direct)		✓	✓	✓	✓	✓	✓
DLC Solutions (EthosCE)		✓	✓	✓	✓	✓	✓
Educadium (EasyCampus)		✓	✓	✓	✓	✓	✓
iCohere (iCohere)		✓	✓	✓	✓	✓	✓
InReach(InReach CEMS)		✓	✓	✓	✓	✓	✓
Interactyx (TOPYX)		✓	✓	✓	✓		
Latitude Learning (Latitude Learning LMS)		✓	✓	✓	✓	✓	✓
LearnSomething (Learner Community)						✓	
Meridian Knowledge Solutions (Meridian Global)		✓	✓	✓	✓	✓	✓
Neovation (SmarterU.com)		✓			✓	✓	
Peach New Media (Freestone)		✓	✓			✓	
Starfield Talent Management Solutions (Starfield)					✓	✓	✓
Thinking Cap (Thinking Cap LMS)		✓	✓	✓	✓	✓	✓
WBT Systems (TopClass)		✓	✓	✓	✓	✓	✓
Web Courseworks (CourseStage)		✓	✓	✓	✓	✓	✓

Communication and Collaboration

COMMUNICATION AND COLLABORATION TOOLS

- Which communication and collaboration tools are available in the LMS?
 - Ability to organize end users in groups for collaborative work
 - Discussion boards
 - Virtual whiteboard

- Ability to associate a wiki with a course
- Networking (e.g., ability for end users to connect with one another)
- Ability for each registered end user to have a blog

	Groups for collaborative work	Discussion boards	Virtual whiteboard	Wiki with a course	Networking	Blog
Avilar (WebMentor LMS)	Standard	Standard	Third-party	Third-party	Third-party	Third-party
Blackboard (Blackboard Learn)	Standard	Standard	Standard	Standard	Standard	Standard
BlueVolt (BlueVolt)	Unavailable	Unavailable	Unavailable	Semi-standard	Unavailable	Unavailable
CommPartners (MemberSight Community)	Standard	Standard	Unavailable	Standard	Standard	Third-party
Digital Ignite (Crowd Wisdom)	Standard	Standard	Third-party	Standard	Standard	Semi-standard
Digitec Interactive (Knowledge Direct)	Completely custom	Standard	Third-party	Completely custom	Semi-standard	Unavailable
DLC Solutions (EthosCE)	Standard	Standard	Third-party	Completely custom	Semi-standard	Semi-standard
Educadium (EasyCampus)	Standard	Standard	Semi-standard	Standard	Third-party	Standard
iCohere (iCohere)	Standard	Standard	Standard	Standard	Standard	Standard
InReach(InReach CEMS)	Unavailable	Unavailable	Standard	Standard	Unavailable	Unavailable
Interactyx (TOPYX)	Standard	Standard	Standard	Completely custom	Standard	Standard
Latitude Learning (Latitude Learning LMS)	Standard	Semi-standard	Semi-standard	Semi-standard	Semi-standard	Semi-standard
LearnSomething (Learner Community)	Standard	Standard	Third-party	Standard	Third-party	Third-party
Meridian Knowledge Solutions (Meridian Global)	Standard	Standard	Third-party	Semi-standard	Semi-standard	Standard
Neovation (SmarterU.com)	Standard	Third-party	Third-party	Third-party	Third-party	Third-party
Peach New Media (Freestone)	Standard	Standard	Semi-standard	Standard	Standard	Completely custom
Starfield Talent Management Solutions (Starfield)	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
Thinking Cap (Thinking Cap LMS)	Unavailable	Standard	Unavailable	Unavailable	Unavailable	Third-party
WBT Systems (TopClass)	Standard	Standard	Unavailable	Completely custom	Standard	Completely custom
Web Courseworks (CourseStage)	Standard	Standard	Completely custom	Standard	Standard	Standard

E-commerce

E-COMMERCE TRANSACTIONS

1. Which types of e-commerce transactions are available through your LMS?
 - Provides for secure transactions (e.g., via SSL)
 - Handles transactions for online courses
 - Handles transactions for other online items (e.g., PDF study guides)
 - Handles transactions for physical items (e.g., books or CDs)
 - Automatically handles payment by credit card (no manual intervention needed)

- Handles payment by check (manual intervention needed)
- Handles payment by invoice (manual intervention needed)

	Secure transactions	For online courses	For other online items	For physical items	By credit card	By check	By invoice
Avilar (WebMentor LMS)	Standard	Standard	Unavailable	Unavailable	Standard	Standard	Standard
Blackboard (Blackboard Learn)	Third-party	Third-party	Third-party	Third-party	Third-party	Third-party	Third-party
BlueVolt (BlueVolt)	Standard	Standard	Semi-standard	Unavailable	Standard	Unavailable	Unavailable
CommPartners (MemberSight Community)	Standard	Standard	Standard	Standard	Standard	Standard	Standard
Digital Ignite (Crowd Wisdom)	Standard	Standard	Standard	Standard	Standard	Standard	Standard
Digitec Interactive (Knowledge Direct)	Standard	Standard	Semi-standard	Semi-standard	Standard	Standard	Standard
DLC Solutions (EthosCE)	Standard	Standard	Standard	Standard	Standard	Standard	Standard
Educadium (EasyCampus)	Standard	Standard	Standard	Completely custom	Standard	Semi-standard	Semi-standard
iCohere (iCohere)	Standard	Standard	Standard	Standard	Standard	Standard	Standard
InReach(InReach CEMS)	Standard	Standard	Standard	Standard	Standard	Standard	Standard
Interactyx (TOPYX)	Standard	Standard	Standard	Completely custom	Standard	Unavailable	Completely custom
Latitude Learning (Latitude Learning LMS)	Standard	Standard	Completely custom	Completely custom	Standard	Semi-standard	Semi-standard
LearnSomething (Learner Community)	Standard	Standard	Standard	Completely custom	Standard	Standard	Standard
Meridian Knowledge Solutions (Meridian Global)	Standard	Standard	Standard	Standard	Standard	Semi-standard	Standard
Neovation (SmarterU.com)	Semi-standard	Semi-standard	Semi-standard	Semi-standard	Completely custom	Completely custom	Completely custom
Peach New Media (Freestone)	Standard	Standard	Standard	Standard	Standard	Standard	Standard
Starfield Talent Management Solutions (Starfield)	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
Thinking Cap (Thinking Cap LMS)	Standard	Standard	Completely custom	Completely custom	Standard	Unavailable	Completely custom
WBT Systems (TopClass)	Standard	Standard	Standard	Standard	Standard	Standard	Standard
Web Courseworks (CourseStage)	Standard	Standard	Standard	Standard	Standard	Standard	Standard

Support and Training

SUPPORT OPTIONS

1. Which support options are available?
 - Live telephone support for end users
 - Live telephone support for administrators

- E-mail support for end users
- E-mail support for administrators
- Self-serve, searchable knowledge base for end users
- Self-serve, searchable knowledge base for administrators

	Telephone: end users	Telephone: administrators	E-mail: end users	E-mail: administrators	Knowledge base: end users	Knowledge base: administrators
Avilar (WebMentor LMS)	Standard	Standard	Standard	Standard	Standard	Standard
Blackboard (Blackboard Learn)	Standard	Standard	Third-party	Standard	Standard	Standard
BlueVolt (BlueVolt)	Standard	Standard	Standard	Standard	Standard	Standard
CommPartners (MemberSight Community)	Completely custom	Standard	Standard	Standard	Unavailable	Standard
Digital Ignite (Crowd Wisdom)	Completely custom	Semi-standard	Standard	Standard	Standard	Standard
Digitec Interactive (Knowledge Direct)	Semi-standard	Standard	Semi-standard	Standard	Standard	Standard
DLC Solutions (EthosCE)	Third-party	Standard	Completely custom	Standard	Semi-standard	Standard
Educadium (EasyCampus)	Semi-standard	Semi-standard	Standard	Standard	Standard	Standard
iCohere (iCohere)	Standard	Standard	Standard	Standard	Standard	Standard
InReach(InReach CEMS)	Standard	Standard	Standard	Standard	Unavailable	Standard
Interactyx (TOPYX)	Semi-standard	Standard	Standard	Standard	Standard	Standard
Latitude Learning (Latitude Learning LMS)	Completely custom	Standard	Completely custom	Standard	Semi-standard	Semi-standard
LearnSomething (Learner Community)	Standard	Standard	Standard	Standard	Standard	Standard
Meridian Knowledge Solutions (Meridian Global)	Standard	Standard	Standard	Standard	Standard	Standard
Neovation (SmarterU.com)	Completely custom	Standard	Completely custom	Standard	Standard	Standard
Peach New Media (Freestone)	Standard	Standard	Standard	Standard	Standard	Completely custom
Starfield Talent Management Solutions (Starfield)	Semi-standard	Standard	Semi-standard	Standard	Standard	Standard
Thinking Cap (Thinking Cap LMS)	Unavailable	Standard	Unavailable	Standard	Unavailable	Standard
WBT Systems (TopClass)	Unavailable	Standard	Unavailable	Standard	Unavailable	Unavailable
Web Courseworks (CourseStage)	Semi-standard	Standard	Standard	Standard	Standard	Standard

Vendor Profiles

In the following section, which is arranged alphabetically by company name, we provide detailed information on each participating vendor. To help ensure you understand the intent of the questions asked, please review the glossary included earlier in this report; these definitions were provided to the LMS companies, and they were asked to keep them in mind as they prepared their survey responses.

Each company's profile consists of three subsections.

SUMMARY INFORMATION

We include at the beginning of each profile quick summary information about the vendor. Please note that this summary information is drawn directly from the companies' survey responses—the language is theirs, not ours.

OUR TAKE

Next we include high-level notes from us on the LMS. In addition to completing the survey, each participating company also provided us with a demonstration of its system. Our take on each LMS is based on both the companies' written survey responses and their product demonstrations.

THE SURVEY RESPONSES

The final subsection of each profile is the company's full response to the survey, which was divided into 28 sections and consisted of 242 questions. Each section of the survey ended with a free-text response field, intended as a catchall for qualifications of the company's answers to any questions in the preceding section, caveats, suggestions for improving the survey questions, or general comments.

Company responses are presented as submitted to us, without substantive alteration—we limited our editorial pen to the correction of obvious typographical errors, spacing issues, and the like.

An em dash (—) is used to indicate the LMS company did not provide a response where one was expected (requested). “Not applicable” is used to indicate the LMS company did not provide a response, but no response was expected because the question does not apply (e.g., the question asks about pricing for client-hosted implementations, but the company does not offer client-hosted options).

WebMentor LMS Avilar

LMS Version: 7.0

Value proposition: Consistently rated as a low cost, high value solution. Flexible platform that's configurable for a variety of talent management and eLearning activities. Does not include extraneous platforms, for example, compensation management or performance reviews. 100% web-based, browser-agnostic. Provides all of the most valuable features while stripping away the ones that cause an excessive burden on resources and time. Supports online and live instructor-led training as well as includes a full features shopping cart. Entire LMS available for prices provided, not a modular system.

Top clients (associations): CareLearning.com • Society of Fire Protection Engineers • Georgia Center for Non-Profits • American Public Power Association • National Institute of Building Inspectors

Top clients (non-associations): DISA (Defense Information Systems Agency) • US Army National Guard • Com2learn.com • Sierra Wireless • Pharmaceutical Education & Research Institute • College Summit

URL for more information about the LMS:
http://www.avilar.com/learning_management/lms.html

Three-year pricing: \$11,200 to \$288,000

Hosting: By company or by client



Industry focus: health care, defense, and high tech



Avilar

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Columbia, MD 21046

410.290.0008

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<http://www.avilar.com>



Our Take on WebMentor LMS

Some Highlights

Avilar promotes itself as “The Competency Company” and focuses on talent management and workforce development. While this language is most common in corporate settings, it translates well into any situation where particular competencies are required as part of a training or certification path.

- WebMentor LMS is not actually the core of Avilar’s competency offering—the WebMentor Skills platform plays that role—but it does offer strong capabilities for defining and tracking certification criteria along with tools for managing and selling online course offerings.
- Avilar is one of the eight companies included in this report that allow clients to host their own installation of the learning management system—although its hosted installations (on either shared or dedicated servers) number about twice as many as client-hosted installations.
- Avilar emphasizes blended approaches to learning. WebMentor LMS is designed for managing instructor-led courses—both online and off—as well as on-demand e-learning.
- Learners can self-report and edit credit for courses taken outside of the system—a good feature for lifelong learners who may receive educational credit from a variety of sources.
- WebMentor Player allows learners with poor or no access to a network to take the courses distributed on CD-ROM. Tracking data is transferred, using e-mail, to the WebMentor LMS server when a network connection is established.
- WebMentor LMS offers built-in e-mail notification to both learners and instructors based on common triggers, like enrollment and completion.
- The threaded discussions in WebMentor LMS can be open to all users in an installation or limited to learners in a particular course. But a company representative commented that many of their clients want to use “known” social media (e.g., LinkedIn and Facebook) or some tool they’ve already invested in (e.g., Higher Logic), and so Avilar also focuses on connecting with other platforms, rather than only supporting the LMS-powered collaboration and communication tools.
- The system provides an integrated e-commerce shopping cart along with good tools for managing courses as products. For example, multiple “sessions” of a course with distinct properties, including price, can be created.
- WebMentor Author, an online course authoring tool, is available for free with the WebMentor system. One caveat: Courses created with WebMentor Author are designed to be delivered exclusively in WebMentor LMS.
- Avilar has partnerships with content providers InfoSource, Compliance Online, careLearning, and the Society of Fire Protection Engineers to offer WebMentor LMS customers easy access to up-to-date, cost-effective, and interactive Web-based training courses in areas like compliance and ethics, healthcare, leadership, and safety.
- Since the last report, Avilar has developed a new version of its LMS (WebMentor LMS 7.0), and development focused in part on a new and improved interface.

Avilar offers a very solid platform that seems particularly attuned to selling and managing both online and offline training on a large scale.

General Company Information

1. When was the company founded?
1997
2. How many employees does the company currently have?
20
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
WebMentor Learning Management System (LMS), WebMentor Skills competency management system with the Avilar Competency Model, Competency Management Consulting.
5. Provide the company's contact information.
*6760 Alexander Bell Dr., Suite 105
Columbia, MD 21046
USA
sales@avilar.com
410-290-0008*
6. Provide the URL for the company's Web site.
http://www.avilar.com
7. Provide any other information or notes relevant to the "General Company Information" section.
Avilar, Inc., The Competency Company™ is a leader in web-based competency management and learning solutions for non-profit, corporate, and government organizations. With its Smart, Strategic and Proactive™ solutions, Avilar offers a competency-based approach to workforce development. Formed in 1997, Avilar was a pioneer with its award-winning WebMentor LMS™ and continues to be a leading innovator with WebMentor Skills™ its web-based competency management solution. As recipient of the "Excellence in E-Learning for Customer Satisfaction" award from Brandon Hall and E-Learning Magazine, and Avilar's ranking as a top "Price-to-Value" provider by Training Magazine, Avilar has built itself on the basis of superior customer service and highly adaptable product design. In addition, Avilar consultants are recognized as industry thought leaders and have decades of experience in implementation and analysis.

General LMS Information

1. What is the name of the LMS product?
WebMentor LMS
2. Provide the product version described in this survey response.
7.0
3. When was the first version of the LMS initially released?
4/1/1997
4. Briefly describe the upgrade cycles for the LMS.
New major version released annually, minor release semi-annual, bug fixes immediately.
5. How many associations use this LMS?
7
6. How many organizations in total use this LMS, including associations?
150
7. How many end users are registered in the single largest client implementation *hosted by the company*?
175,000
8. How many end users are registered in the single largest client implementation *hosted by the client*?
30,000
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
500,000
10. Briefly describe the value proposition for this LMS as it applies to associations.
Consistently rated as a low cost, high value solution. Flexible platform that's configurable for a variety of talent management and eLearning activities. Does not include extraneous platforms, for example, compensation management or performance reviews. 100% web-based, browser-agnostic. Provides all of the most valuable features while stripping away the ones that cause an excessive burden on resources and time. Supports online and live instructor-led training as well as includes a full features shopping cart. Entire LMS available for prices provided, not a modular system.

11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
- 499 or fewer registered end users
15%
 - 500 to 2,499 registered end users
35%
 - 2,500 to 4,999 registered end users
20%
 - 5,000 to 9,999 registered end users
15%
 - 10,000 to 24,999 registered end users
10%
 - 25,000 or more registered end users
5%
12. What approximate percentage of your client association implementations fall into the following size categories based on the number of *individual* members in the association?
- 1,000 or less
25%
 - 1,001 to 5,000
25%
 - 5,001 to 10,000
0%
 - 10,001 to 25,000
25%
 - 25,001 to 50,000
0%
 - 50,001 to 100,000
0%
 - More than 100,000
25%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
- Less than 100
50%
 - 101 to 200
25%
 - 201 to 500
25%
 - 501 to 1,000
0%
- 1,001 to 5,000
0%
 - More than 5,000
0%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
Health Care, Defense, High Tech.
15. Please list the company's top *association* clients.
CareLearning.com • Society of Fire Protection Engineers • Georgia Center for Non-Profits • American Public Power Association • National Institute of Building Inspectors
16. Please list the company's other (non-association) top clients.
DISA (Defense Information Systems Agency) • US Army National Guard • Com2learn.com • Sierra Wireless • Pharmaceutical Education & Research Institute • College Summit
17. Provide a URL for more information about the LMS.
http://www.avilar.com/learning_management/lms.html
18. Provide any other information or notes relevant to the "General LMS Information" section.
WebMentor LMS is a feature-rich learning management system that is consistently rated as a low-cost, high-value solution by talent management analyst Brandon Hall. The WebMentor LMS solution enables your organization to deliver and manage training and assessments, easily track learner activities, certifications, and credits. A full featured shopping cart supports credit card and purchase order payments, as well as coupons. Avilar designed WebMentor LMS with the user in mind; as an easy-to-use, straightforward and cost-effective solution. Many organizations are searching for an eLearning solution that solves problems, not one that is so complex it creates more. This is why so many associations, organizations and eLearning consultants choose WebMentor LMS as their learning management system.

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)
 - Complex
5
 - Typical
2
 - Simple
1
2. Briefly describe the implementation process.
 - *Hosted environment*
 - ▶ *Customize LMS user interface*
 - ▶ *Import LMS data from old server (if needed)*
 - ▶ *Implement custom reports and integrations (if needed)*
 - ▶ *Testing & rollout*
 - ▶ *Administration training*
 - *Licensed environment*
 - ▶ *Server setup*
 - ▶ *Customize LMS user interface*
 - ▶ *Import LMS data from old server (if needed)*
 - ▶ *Implement custom reports and integrations (if needed)*
 - ▶ *Testing & rollout*
 - ▶ *Administration training*
3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.
Project manager, Customer support engineer.
4. Please specify the location (by time zone) of company personnel involved in implementation.
-5 UTC

5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
Project leader, IT engineer (if installing the product on client's own server).
6. Provide any other information or notes relevant to the "LMS Implementation" section.
If licensed to run on client's own server: requires installation of Adobe ColdFusion and a database product (MS SQL Server or Oracle).

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$8,000
 - 2,500
\$15,000
 - 5,000
\$22,500
 - 10,000
\$30,000
 - 25,000
\$40,000
 - Unlimited
\$50,000

2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$11,200
 - 2,500
\$21,000
 - 5,000
\$31,500
 - 10,000
\$42,000
 - 25,000
\$56,000
 - Unlimited
\$70,000
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$12,000
 - 2,500
\$30,000
 - 5,000
\$45,000
 - 10,000
\$60,000
 - 25,000
\$90,000
 - Unlimited
\$120,000
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$28,800
 - 2,500
\$72,000
 - 5,000
\$108,000
 - 10,000
\$144,000
 - 25,000
\$216,000
 - Unlimited
\$288,000
5. Briefly describe the pricing model for the LMS.
- The prices listed are for an enrollment-based pricing model where the same students can register for as many courses as needed throughout the year. There is no charge or limit on administrative users. We also provide a registration-based pricing model that is common for clients who resell training. Contact Avilar for details. If the client licenses the LMS to run on their own servers, there is an annual license fee based on the total number of enrolled students. Avilar provides support by web conference during software installation. Maintenance included first year and is optional following the first year at 20% of the annual license price.*
6. Briefly describe the payment schedule.
- If Avilar is hosting the system, the initial set up price is due upon contract signing, hosting/user invoices are sent monthly. If the client is hosting the system, payment is required upfront for the entire year in most cases, though sometimes a monthly payment plan can be arranged.*

7. Briefly describe pricing for additional services.
When Avilar hosts the system, tier 2 technical support is available at \$180/hour. Avilar charges \$225/hour for custom product engineering and we can provide a detailed estimate after reviewing the project scope. Custom reports typically run around \$500 each.
8. Provide any other information or notes relevant to the “Pricing” section.
No nickel and dime schemes (not sold in modules and we prefer not to impose limits on bandwidth or storage space).
 - *Hosted by Avilar*
 - *Initial set up cost & monthly hosting/user cost*
 - *Hosted by client*
 - *Annual license cost*

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Microsoft Windows Server 2003 or later Adobe ColdFusion 8 Standard Ed. or later MS SQL Server 2005 or later Oracle 8i or later.
2. Briefly describe the technical framework and code structure of the LMS.
WebMentor LMS is an N-tier web-based ColdFusion application (Java middleware) that interacts with its database. Many of the LMS subsystems (like authentication, courseware delivery, ecommerce) can be replaced or augmented per customer specifications.
3. Briefly describe the LMS’s ability to share data for the purposes of migration and integration.
WebMentor LMS can import and export CSV data files to provide batch processing for several types of operations (account setup, course registration, etc.). The LMS can also interact with other web-based applications via web services interfaces.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.

WebMentor LMS is able to scale to handle any population size. Our largest SaaS customer is a currently support over 2.5 million active student registrations at any given time.

5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
There are no software-imposed limits in the product. The only limits are hardware capacity (hard drive space, datacenter bandwidth allocation, etc.) which Avilar will upgrade to support client growth.
6. Provide any other information or notes relevant to the “Technology” section.
Interaction with WebMentor LMS is completely browser-based and the product is highly browser-agnostic. It requires no exotic browser technologies or plugins beyond cookie and javascript enablement.

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
Any Internet connected computer, using any web browser with typical JavaScript and Cookies enabled.
2. What are the technical requirements for an *administrator* to access the LMS?
Any Internet connected computer, using any web browser with typical JavaScript and Cookies enabled.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the “System Requirements” section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
20%
2. Briefly describe the typical types of integration for the LMS.
HRIS integration, eCommerce (payment gateways), 3rd party course catalogs, Retrieval of student results.
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
CSV batch data import/export, web services.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
Discuss client needs & goals. Review technical requirements. Provide estimate for custom product engineering if needed. Draft Project Plan. Implement the integration. Testing & roll-out.
5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect
 - Elluminate
 - Genesys ✓
 - GoToWebinar ✓
 - Microsoft Live Meeting ✓
 - ReadyTalk ✓
 - WebEx ✓
 - Completely custom (non-commercial) Webinar system ✓
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify)
6. With which of the following association management systems (AMSES) has the LMS been integrated for a client implementation?
 - Aptify (Aptify)
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid)
 - CRM for Members (ProTech)
 - IMIS (Advanced Systems International)
 - IRMembership (IRM Systems)
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
 - Members360 (Affiniscape)
 - netFORUM (Avecetra)
 - Office Manager (internet4associations)
 - Personify (TMA Resources)
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS ✓
 - The LMS has never been integrated with an AMS.
 - Other (please specify)
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
Yes. HarvestRoad Hive (industrial strength), WebMentor LMS has a lightweight CMS for managing course handouts, assignments, etc.
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
Yes. PayPal/VeriSign, E-xact, CyberCash.
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.

Yes. Avilar's WebMentor Author, Articulate, iSpring, Lectora, Captivate, and many other SCORM authoring products.

11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.

Yes. Avilar's WebMentor Skills.

12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.

Yes. Avilar's WebMentor Author, Avilar's WebMentor Skills.

13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.

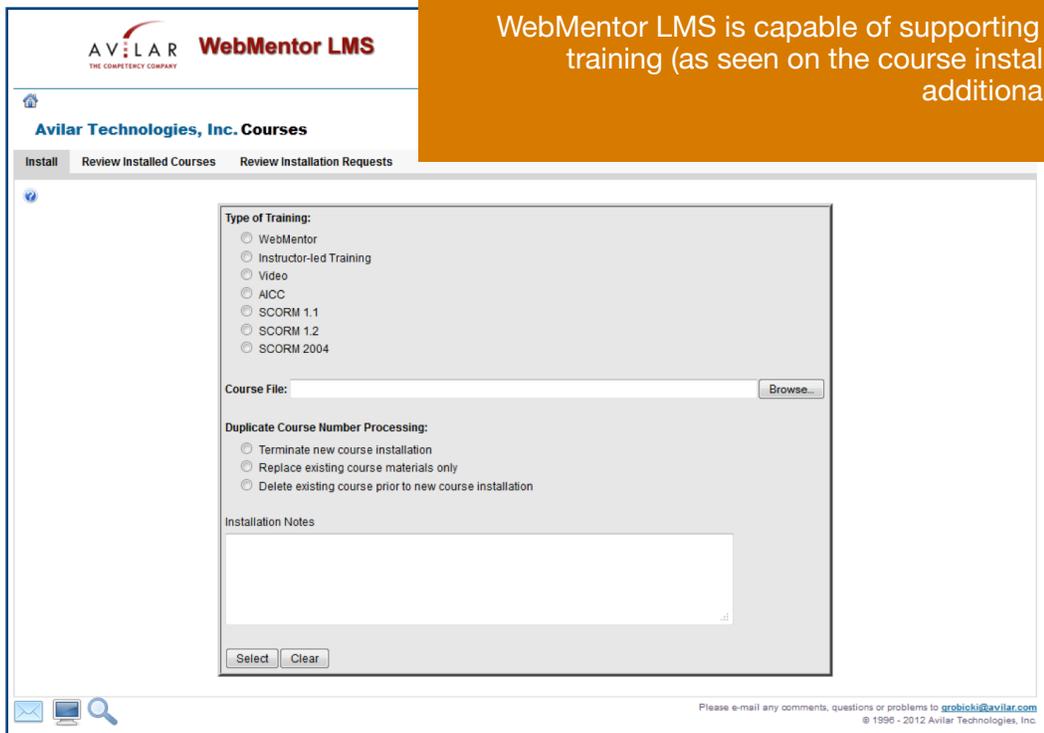
Yes. MindLeaders, SkillSoft, NetG, CourseAvenue, EJ4, InfoSource, QuicKnowledge, Compliance Online and others.

14. Provide any other information or notes relevant to the "Integration and Interoperability" section.

The product has been designed to easily replace modules and integrate additional features per customer requirements.

Standards and Guidelines

- Does the LMS produce content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards. ✓
 - Other (please specify)
- Can the LMS play content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium ✓
 - Medbiquitous
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)



3. Provide any other information or notes relevant to the “Standards and Guidelines” section.

Avilar’s WebMentor LMS was the first LMS to be certified conformant to SCORM 1.2 RTE Level 3. The LMS is also designed to AICC Guideline AGR-010 Revision 4.0 “Web-based Computer Managed Instruction.”

Hosting

1. Is the LMS available as a *company-hosted* solution?
Yes
2. How many LMS installations are hosted by the *company*?
100
3. Is the LMS available as a *client-hosted* solution?
Yes
4. How many LMS installations are hosted by the *client*?
50
5. How does the company provide LMS hosting?
 - On servers managed directly by the company
 - On servers managed by a partner ✓
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
6. If the company’s LMS hosting is provided by a partner or partners, please list the name (s).
RackSpace Intensive Hosting (recently achieved 100% up-time 2 years in a row).
7. Briefly describe the company’s preferred or recommended hosting option.
Hosted by Avilar on a shared server unless capacity requirements warrant a dedicated server (usually around 10,000+ active learners).
8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
Routine maintenance is scheduled by the Rackspace datacenter staff. Avilar announces

these very rare events 48 hours before they occur to alert users. These typically occur over-night or on weekends. Otherwise, the application is available 24/7/365.

9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing ✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the “Hosting” section.
Avilar can “sandbox” demo sites for 30-days for testing at no charge.

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users’ prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
Yes
6. Provide any other information or notes relevant to the “Personalization” section.

WebMentor LMS is completely configurable for each organization both in terms of its user interface, and which functions are available to users belonging to the organization.

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
Yes. By editing HTML and ColdFusion templates and their associated CSS files.
2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).
Yes. By editing HTML and ColdFusion templates and their associated CSS files.
3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.
Yes. Organizations can easily enable/disable navigation features and functions available to their users.
4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.
Yes. Organizations can easily enable/disable navigation features and functions available to their users.
5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
Yes. By editing HTML and ColdFusion templates.
6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly

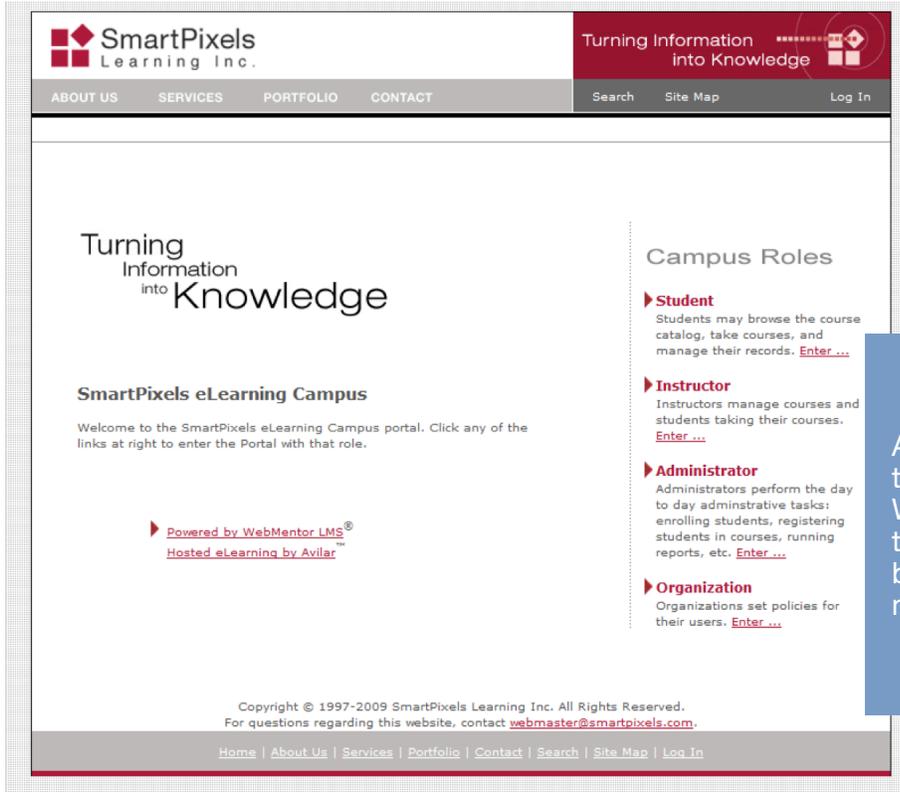
describe how the content for the *administrator* view is customized.

Yes. By editing HTML and ColdFusion templates.

7. Provide any other information or notes relevant to the “Interface Configuration” section.
—

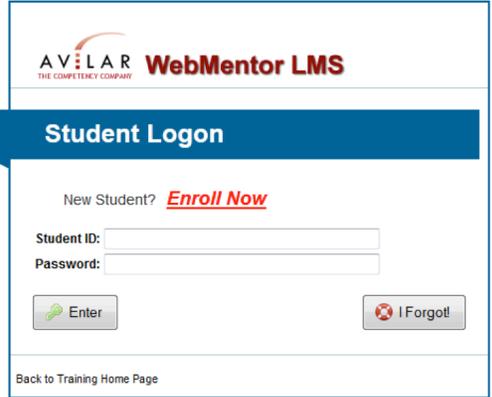
Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
No
5. Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes
6. In how many countries has the LMS been implemented for clients?
8
7. Please list the countries where the LMS has been implemented for a client.
United States, Mexico, Canada, Denmark, UK, Australia, Greece, Korea.

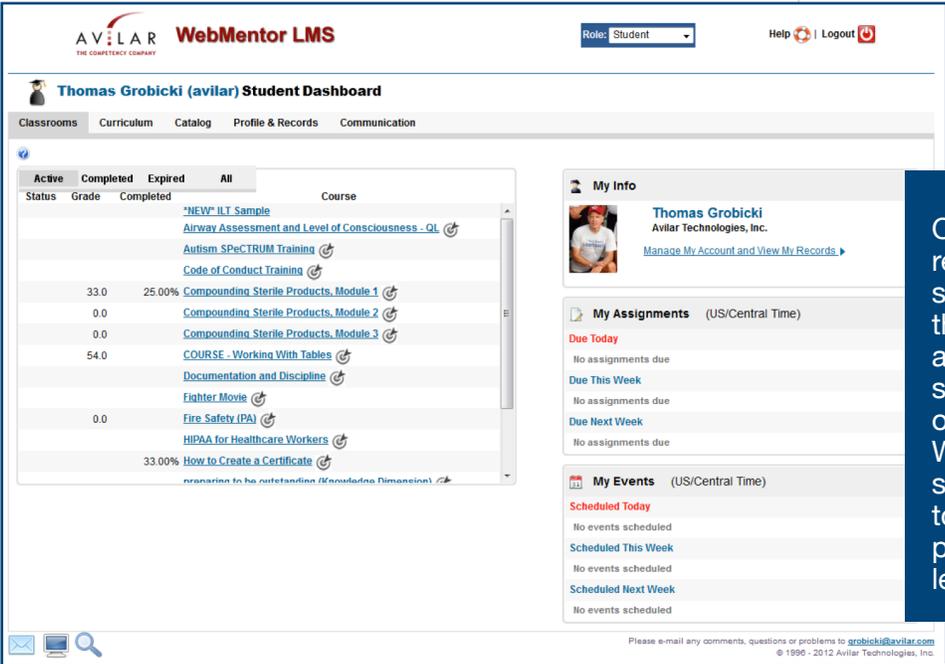


All customers start with a tailored page to enter WebMentor LMS. It is typically styled to match the branding of the association's main Web site.

Coming from the campus page, users reach a log-in screen that can be as simple or complex as an organization wants. The method of authentication can be changed to use fields like e-mail address or association ID instead of student ID. Single sign-on can also be used.



Please e-mail any comments, questions or problems to support@avilar.com
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Once authenticated, users reach the WebMentor LMS student dashboard that shows the major activities to accomplish. Most of the sections on this page are optional and can be removed. When needed, additional screen elements can be added to support social media or provide documents used by learners.

WebMentor LMS provides the ability to completely change not only the student interface (including language) but also all administrative screens.

Below is the same administrative screen as shown above but with different layout and data. Users can be allowed to pick from their preferred layouts, so all users don't have to have the same interface.

Course	Session	Max. Students	Registered	Completed
01_intro	1	3	1	0
01_tema	1	3	1	0
02PREFER	1	10	1	0
3606	1	10	4	0
5307aut	1	10	4	1
a3	1	5	2	0
aaa	1	5	1	0
aaa	2	333	0	0
aaa	3	333	0	0
aaa	4	333	0	0
aaa	5	333	0	0

Subscription	Max. Students	Subscribed
123	3	1
APPSUB1	10	0
DeregTST	11	0
DMa	50	0
PMSUB1	200	3
PMSUB1a	150	0
PMSUB1b	30	0
WMtutor	30	2
WMutor2	50	0

Instructor	ILT Courses	Online Courses
avilar Default Instructor (avilar)	8	64
Avilar Instructor 1 (avinst1)	8	66

8. In how many languages has the LMS been implemented for clients?
2
 9. Please list the languages in which the LMS has been implemented for a client.
English, Spanish.
 10. How many language packs are available for the *end-user* view of the LMS?
2
 11. Please list the languages for which a language pack is available for the *end-user* view.
English, Spanish.
 12. How many language packs are available for the *administrator* view of the LMS?
2
 13. Please list the languages for which a language pack is available for the *administrator* view.
English, Spanish.
 14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
WebMentor LMS supports English and Spanish “out of the box.” We have done special projects with clients to offer courses in a wide variety of languages, including Korean. Courses that support UTF-8 character sets can generally be launched and tracked. WebMentor LMS has not been double-byte enabled for all areas requiring user input (i.e., typing), but adding support for double-byte input is certainly feasible. Avilar will provide a cost estimate for implementing this feature once we identify the following requirements: language(s), operating system(s), and browsers(s).
- A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for other end users
 - The LMS does not support search by end users.
 - Other (please specify)
 3. What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify)
 4. Provide any other information or notes relevant to the “Search and Catalogs” section.
Certain roles with sufficient privileges may issue arbitrary queries against the database to search and report on any available data.

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓

This view of the WebMentor LMS catalog is available to authenticated users as well as displayable outside the LMS. The catalog can be fully tailored and can include course information like cost, schedule, and duration.

Catalog No /	Type	Catalog Title	
02PREFER		Preferences ⓘ Lessons: 1 Fee: No Charge	Sessions: 1
123		asd Courses: 2 Fee: No Charge	Duration: 12 Days
3606		✓ Airway Assessment and Level of Consciousness - QL ⓘ Fee: No Charge	Sessions: 1
5307aut		✓ Autism SPeCTRUM Training ⓘ Lessons: 9 Fee: No Charge	Sessions: 1
a3		✓ Fire Safety (PA) ⓘ Fee: No Charge	Sessions: 1
aaa		aaa ⓘ Fee: No Charge	Sessions: 1

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?

- Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
- Facilitated online courses (excluding Webinars) ✓
- Real-time Webinars ✓
- Recorded or on-demand Webinars ✓
- Audio or video podcasts ✓
- Member-only discussion boards ✓
- Electronic study guides ✓
- E-learning programs combined with classroom-based learning (blended learning) ✓
- Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
- Educational simulations or games
- CD-ROM or DVD-based education ✓
- Third-party “off-the-shelf” courses ✓

- Other (please specify)
- ### 2. By which criteria can online courses be marked completed?
- The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)
- ### 3. Does the LMS provide the ability to author learning content?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

AVILAR WebMentor LMS Role: Student Help | Logout

Thomas Grobicki (avilar) Student Dashboard

Classrooms Curriculum Catalog Profile & Records Communication

Active	Completed	Expired	All	
Status	Grade	Completed		Course
				NEW ILT Sample
				Airway Assessment and Level of Consciousness - QL
				Autism SPeCTRUM Training
				Code of Conduct Training
33.0	25.00%			Compounding Sterile Products, Module 1
0.0				Compounding Sterile Products, Module 2
0.0				Compounding Sterile Products, Module 3
54.0				COURSE - Working With Tables
				Documentation and Discipline
				Fighter Movie
0.0				Fire Safety (PA)
				HIPAA for Healthcare Workers
	33.00%			How to Create a Certificate
				Preparing to be outstanding (Knowledge Dimension)

My Info
 Thomas Grobicki
 Avilar Technologies, Inc.
[Manage My Account and View My Records](#)

My Assignments (US/Central Time)
 Due Today: No assignments due
 Due This Week: No assignments due
 Due Next Week: No assignments due

My Events (US/Central Time)
 Scheduled Today: No events scheduled
 Scheduled This Week: No events scheduled
 Scheduled Next Week: No events scheduled

The student dashboard in WebMentor LMS provides pertinent information for each course the student is enrolled in, including the syllabus, class roster, and progress. Additional elements like assignments, course material, and social learning opportunities are presented on this screen if the course uses those features. Here the course shows a related Facebook page.

WebMentor LMS can manage many sessions of the same course, and each session may have different properties. This screen illustrates some of those, but sessions can include price differences, seat management, and approvals.

AVILAR WebMentor LMS Role: Administrator Help | Logout

Course/Session Summary Report

Diplomado en Mercadotecnia (01_intro)							
Course Type: SCORM 1.2							
Session Summary							
Session	Sponsoring Organization	Session Type	Start Date (US/Eastern)	End Date (US/Eastern)	Max. Students	Reg. Students	Comp. Students
1	avilar	Private			3	1	0
Diplomado en Mercadotecnia Course Totals					3	1	0
Banco BanCoppel (01_tema)							
Course Type: SCORM 1.2							
Session Summary							
Session	Sponsoring Organization	Session Type	Start Date (US/Eastern)	End Date (US/Eastern)	Max. Students	Reg. Students	Comp. Students
1	avilar	Private			3	1	0
Banco BanCoppel Course Totals					3	1	0
Preferences (02PREFER)							
Course Type: SCORM 1.2							
Session Summary							
Session	Sponsoring Organization	Session Type	Start Date (US/Eastern)	End Date (US/Eastern)	Max. Students	Reg. Students	Comp. Students
1	avilar	Private			10	1	0
Preferences Course Totals					10	1	0
Airway Assessment and Level of Consciousness - QL (3606)							
Course Type: AICC							
Session Summary							
Session	Sponsoring Organization	Session Type	Start Date (US/Eastern)	End Date (US/Eastern)	Max. Students	Reg. Students	Comp. Students
1	avilar	Private			10	4	0
Airway Assessment and Level of Consciousness - QL Course Totals					10	4	0

- If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
Courses may be authored with WebMentor Author (free to LMS clients) and then installed in the LMS. Courses may also be authored with any product that creates a SCORM course installation package.
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
Rich media objects (Flash, audio, video) may be installed, launched, and tracked in WebMentor LMS.
 5. Does the LMS support offline authoring of learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
WebMentor Author may be used to author courses offline. WebMentor Author is available for free download at Avilar.com. Courses may also be authored with any product that creates a SCORM course installation package.
 6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Check in/check out functionality
Unavailable
 - Ability to review content before it is published
Unavailable
 - Ability to assign tasks to administrators
Unavailable
 - Ability to monitor progress on tasks
Unavailable
 - Ability to add internal comments (viewable only by other administrators) to content
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 8. Can the LMS generate printer-friendly content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
Standard reports are available in printable HTML and PDF formats.
 9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the digital rights management functions.

10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Browser-delivered online content ✓
 - Downloadable version
 - CD or DVD ✓
 - HTML ✓
 - SWF
 - PDF
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
WebMentor Author for proprietary courses. Any third-party authoring product that produces a SCORM installation package such as Articulate or Captivate.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
WebMentor Author is available for free download at Avilar.com.

In-person, Place-based Courses

- Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Standard
 - Personnel management (for scheduling instructors and facilitators)
Standard
 - Facility management (for scheduling rooms)
Standard
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Standard
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Standard
- Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
No
- Provide any other information or notes relevant to the “In-person, Place-based Courses” section.
—

Webinars

- Does the LMS provide integrated Webinar functionality?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
The LMS can launch third-party webinar applications and pass needed data as URL-encoded parameters.
- Briefly describe the company’s preferred or recommended Webinar software.
No specific preference.
- Provide any other information or notes relevant to the “Webinars” section.
—

Registration

- How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify)
- Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
- Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
- Does the LMS provide self-serve password recovery help for end users?
Yes

AVILAR THE COMPETENCY COMPANY WebMentor LMS Role: Student Help | Logout

Thomas Grobicki Student Information

Profile Password Transcript Wait Lists Request Status Credits & Certifications Activity

Student ID: avilar
 Date Enrolled: 9/18/2007 3:47:17PM US/Central Time
 Student Name: Thomas Grobicki
 Student Time Zone: US/Central
 Address: 17382 SE 75th Coachman Ct.
 City: x
 State: x
 Zip Code: 12345
 Country: x
 Phone: 123-456-7890
 Fax:
 E-mail: sample@avilar.com
 Student Photo:
 Remove Photograph File

Your User Interface Type: Modern
 Organization: Avilar Technologies, Inc. (avilar)
 Credit Card usage is enabled for this student.
 The ability for this student to LOGON is enabled.

Please e-mail any comments, questions or problems to grobicki@avilar.com
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Each organization can have its own user profile definition. Fields in the profile can be tailored to customer needs and include protection features. This screen shows the primary records students can obtain about themselves. Any of the tabs can be removed (for example, the Wait Lists tab can be hidden if that feature is not being used). Student pictures are a useful feature particularly for live events.

AVILAR THE COMPETENCY COMPANY WebMentor LMS Role: Instructor Help | Logout

avilar Default Instructor (avilar) Instructor Dashboard

Office Profile Students Courses Student Reports Course Reports Communication

My Active Instructor-led Training (US/Eastern time)

Course	Session	Location	Start Date	End Date	Registered
aaa	2	Avilar Training Room 1	11/30/2008 7:00PM	11/20/2012 7:00PM	0
aaa	3	Avilar Training Room 1	11/30/2008 7:00PM	11/20/2012 7:00PM	0
aaa	4	Avilar Training Room 1	11/30/2008 7:00PM	11/20/2012 7:00PM	0
aaa	5	Avilar Training Room 1	11/30/2008 7:00PM	11/20/2012 7:00PM	0
aaa	6	Avilar Training Room 1	11/30/2008 7:00PM	11/20/2012 7:00PM	0

My Online Courses

Course	Session	Max. Students	Registered	Completed
ADMINv53	8	1	1	0
prov40	1	100	0	0
sampaicc	1	100	1	0
sampaicc	2	10	0	0
scs01	1	10	2	0
stutour	1	10	2	0
stutour	2	10	0	0
STUV6	4	50	1	0
WC010002	1	10	2	0
wd02	1	10	3	0
Wildlife	1	100	2	2
wmdemo	2	10	2	1
wmdemo	5	2	2	2
wmdemo	6	150	0	0
wmdemo	8	100	1	1
wmdemo	9	100	0	0
wmdemo	10	10	1	0
wmdemo	11	10	3	0

Student Assignments (US/Eastern Time)

Due Today
No assignments due

Due This Week
No assignments due

Due Next Week
No assignments due

My Events (US/Eastern Time)

Scheduled Today
No events scheduled

Scheduled This Week
No events scheduled

Scheduled Next Week
No events scheduled

Although not required, instructors can be made responsible for one or more course sessions in WebMentor LMS. This primary dashboard shows an instructor's current responsibilities. Instructors can create assignments for courses, post additional course material, and grade student submissions.

5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
7. Can the fields for end user profiles be added, edited, and deleted?
Yes
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
No
10. Provide any other information or notes relevant to the "Registration" section.
—

Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes
3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level ✓
 - By course group
 - On a course-by-course basis ✓

- On an end user-by-end user basis
 - Other (please specify)
4. Can enrollments occur based on end user-specific criteria?
 - The end user's role in the system ✓
 - The end user's score on an assessment ✓
 - The end user's completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)
 5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes
 6. Provide any other information or notes relevant to the "Enrollment" section.
WebMentor LMS supports curricula, which define a controlled program of study across multiple requirements, with required and elective courses, prerequisite tracking, auto-enrollment, and many other features. The LMS also supports course "subscriptions" which allow multiple courses to be bundled together for purchase or enrollment.

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
Yes
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
Yes

WebMentor LMS

Role: Student
Help | Logout

Thomas Grobicki Student Information

Profile
Password
Transcript
Wait Lists
Request Status
Credits & Certifications
Activity

AV1 Credits						
Awarded By	Identification	Course	Date Awarded (US/Central)	Date Expires (US/Central)	Credits	Added By
Avilar Technologies, Inc.	p1	prog1	9/22/2011 11:00PM		2.25	Student
Total AV1 Credits					2.25	

Continuing Education Credit (CEU) Credits						
Awarded By	Identification	Course	Date Awarded (US/Central)	Date Expires (US/Central)	Credits	Added By
Avilar Technologies, Inc.		ADMINv53	9/7/2011 11:00PM	9/6/2012 11:00PM	2.50	Student
Total Continuing Education Credit (CEU) Credits					2.50	

Continuing Medical Education (CME) Credits						
Awarded By	Identification	Course	Date Awarded (US/Central)	Date Expires (US/Central)	Credits	Added By
Avilar Technologies, Inc.		ADMINv53	9/7/2011 11:00PM	9/6/2012 11:00PM	1.50	Student
Avilar Technologies, Inc.		HEMOv2	11/13/2007 11:00PM	11/12/2008 11:00PM	1.50	System
Total Continuing Medical Education (CME) Credits					3.00	

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This screen shows an end user's view of her credits and certifications. Credits can either be awarded by the LMS automatically when a course is completed or be self-reported by the end user.

In WebMentor LMS, there are two major methods for grouping courses: a curriculum, which prescribes a path of learning, and a subscription, primarily used to make purchasing related courses easier. This screen shows a curriculum.

WebMentor LMS

Role: Student
Help | Logout

Maresca Test Curriculum 2 Curriculum Catalog

Status Legend
Requirements
✗ Student not registered for any course in requirement
✓ Student registered for course(s) in requirement
✓ Student satisfied requirement

Courses/Subscriptions
✗ Student not registered for course/subscription
✓ Student registered for course/subscription
✓ Student completed course/subscription

Status	Category	Options	Catalog No	Type	Title
—	The Tour				
✓	Core		stutour	📄	WebMentor LMS 6.0 Student Tour
✗	The Demo				
✗	Core		wmdemo	📄	WebMentor Features
✗	Elective	⊘	WMtutor	📄	WebMentor Tutorials
✗	Elective		WMtutor2	📄	WebMentor Tutorial - Part 2
✓	The Tutorials				
✓	Core		ADMINv6	📄	WebMentor Administrator v6.0
✓	Core		INSTRv6	📄	WebMentor Instructor v6.0
✓	Elective		wmv1	📄	Fighter Movie

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WebMentor LMS

Role: Organization
Help | Logout

Transcript Selection ▶ Enrolled Student Selection ▶ Transcript Processing

Avilar Technologies, Inc. Student Transcripts

Student ID: maresca
 Password: paul
 Student Name: Paul maresca
 Date Enrolled: 8/14/2011 5:12PM US/Eastern
 Organization: Avilar Technologies, Inc. (avilar)
 E-mail: pmaresca@thevillages.net

Courses for which Paul maresca is currently registered						
Course No /	Title	Date Registered (US/Eastern)	Completed (US/Eastern)	Grade	Status	Certificate
3606	Airway Assessment and Level of Consciousness - QL	7/5/2012 6:06PM		0.0%	0.0	Reg.
ADMINv6	WebMentor Administrator v6.0	8/27/2011 9:41AM	9/18/2011 12:31PM	72.0	Comp.	📄
Test_ILT	TestILT Course	8/29/2011 9:58AM		0.0%	57.0	Reg.

Courses for which Paul maresca has been deregistered							
Course No /	Title	Date Registered (US/Eastern)	Completed (US/Eastern)	Grade	Status	Date Deregistered (US/Eastern)	Certificate
wmdemo	WebMentor Features	8/14/2011 5:27PM		6.3%	0.0	Dereg.	8/25/2011 8:36AM

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The student transcript in WebMentor LMS shows the current state of active courses and previously taken courses. If a course has a certificate, the student may display it by clicking the certificate icon for that course.

3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
 - By the user claiming the credit ✓
 - By the user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?

Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
 - Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users) ✓

Avilar Technologies, Inc. Student Transcripts

Student ID: maresca
 Password: paul
 Student Name: Paul maresca
 Date Enrolled: 8/14/2011 5:12PM US/Eastern
 Organization: Avilar Technologies, Inc. (avilar)
 E-mail: pmaresca@thevillages.net

Courses for which Paul maresca is currently registered						
Course No	Title	Date Registered (US/Eastern)	Completed (US/Eastern)	Grade	Status	Certificate
3606	Airway Assessment and Level of Consciousness - QL	7/5/2012 6:06PM	0.0%	0.0	Reg.	
ADMINv6	WebMentor Administrator v6.0	8/27/2011 9:41AM	9/18/2011 12:31PM	72.0	Comp.	
Test_ILT	Test ILT Course	8/29/2011 9:58AM	0.0%	57.0	Reg.	

Courses for which Paul maresca has been deregistered							
Course No	Title	Date Registered (US/Eastern)	Completed (US/Eastern)	Grade	Status	Date Deregistered (US/Eastern)	Certificate
wmdemo	WebMentor Features	8/14/2011 5:27PM	6.3%	0.0	Dereg.	8/25/2011 8:36AM	

Report Controls
 Print

The LMS includes a certificate design tool that allows the creation of course completion certificates. Any image can be used for the background and the layout of the fields can be changed.

Overview of Hereditary Hemochromatosis Session 3 Classroom Dashboard

Thomas Grobicki (avilar)
 Overview of Hereditary Hemochromatosis
 Registered: 11/14/2007 at 3:29PM Completed: 11/13/2007 at 11:00PM
 First Access: 8/14/2011 at 5:02PM Last Access: 8/2/2012 at 4:03PM
 US/Central Time

Lesson Title	Studied	Test/Survey
1: Course Introduction	★	
2: Pre-Test	★	71.00 *
3: Disease Description	★	
4: The Numbers	★	
5: Misdiagnosis	★	
6: Symptoms	★	
7: Diagnosis	★	
8: Diagnosis - continued	★	
9: Course Assessment	★	77.00
Progress Summary	100.00%	77.00

Report Controls
 Entries 1 to 9 of 9 Print Download

Learning progress in a course is tracked. This progress report shows the lessons in the course, which ones the student has studied, and test scores, if any.

- Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS’s portfolio functionality.
No
14. How many clients use the LMS to manage continuing education or certification?
100
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE) ✓
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify)

16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.
—

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
- Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?
Yes
4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
- Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
 - No
 - Other (please specify) ✓
Administrators may view and print users’ answers to specific questions.
5. How does the LMS provide for automatic feedback for assessments?
- Per question ✓
 - Based on whether the end user answered the questions correctly ✓

- Per distracter, or answer option ✓
 - Based on which distracter the end user selected ✓
 - Per assessment ✓
 - Based on the end user's overall performance on the assessment ✓
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
Yes
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
Yes
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓

- Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order) ✓
 - Hotspot questions (where users must select the correct area of a graphic) ✓
 - Drag-and-drop questions
 - Other (please specify) ✓
Essay
18. Provide any other information or notes relevant to the “Assessments” section.
—

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
No
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
No

7. Does the LMS allow administrators to create question banks (for reuse purposes)?
No
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row)
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields)
 - Number fields
 - Date fields
 - Time fields
 - Demographic information
 - Other (please specify) ✓

True/false or yes/no questions, Fill-in-the-blank questions (where users type answers in fields in the questions), Matching questions, Sequence questions (e.g., users are asked to put the steps of a process in the correct order), Hotspot questions (where users must select the correct area of a graphic), Essay.

11. Provide any other information or notes relevant to the “Evaluations” section.
Evaluations can support the same questions types as assessments. The only difference is that Evaluations are not graded.

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?

Yes

2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?

Yes

3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?

Yes

4. How does the LMS provide reports?

- Provides a set of standard, pre-configured reports ✓
- Provides a built-in tool for creating ad-hoc reports
- Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
- Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses)
- Other (please specify) ✓

Avilar can create custom reports and add them to any user’s menus.

5. How are the LMS reports made available?

- View report data online in browser ✓
- Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
- Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓

- Other (please specify)

6. How many standard, pre-configured reports are available in the LMS?

60

7. List and briefly describe the standard, pre-configured reports available in the LMS.

- *Student Management*

▸ *Student attributes • Review student registration requests • Review registered students • Review students enrolled in open sessions • Review student enrollment by group • Review student transcripts • Review student enrollment fields • Review student curriculum assignments • Review group curriculum assignments • Review student credits and certifications • Review student subscription assignments • Enrolled student summary by organization • Review registration aging • Student activity • Student roster • Student rankings • Review individual student’s grades for a single course • Student progress • Student completion status by course • Student completion status by course session • Student attendance • Student grades • Student wait list status*

- *Administration*

▸ *Review course administrators • Review course administrator assignments • Review course instructors • Review course instructor assignments • Group summary • Review announcements*

- *Course Management*

▸ *Course session summary • Review subscriptions • Review curricula • Review curricula assignments • Resources: equipment & classrooms • Review resource assignments • Review schedules • Review course credits and certifications • Review course attributes • Review course editing privileges • Review foreign course types • Review instructor-led training (ILT) • Course prerequisites • Review all grades for an individual course • Review assessment grades • Question summary:*

Course	Session	Resource Owner	Description	Type	Equipment ID	Drop
AAA	2	AVILAR	Avilar Training Manual	Materials		<input type="checkbox"/>
AAA	2	AVILAR	Avilar Training Room 1	Location		<input type="checkbox"/>
AAA	2	AVILAR	Projector	Equipment	P-1	<input type="checkbox"/>
AAA	3	AVILAR	Avilar Training Manual	Materials		<input type="checkbox"/>
AAA	3	AVILAR	Avilar Training Room 1	Location		<input type="checkbox"/>
AAA	3	AVILAR	Projector	Equipment	P-1	<input type="checkbox"/>
AAA	4	AVILAR	Avilar Training Manual	Materials		<input type="checkbox"/>
AAA	4	AVILAR	Avilar Training Room 1	Location		<input type="checkbox"/>
AAA	4	AVILAR	Projector	Equipment	P-1	<input type="checkbox"/>
AAA	5	AVILAR	Avilar Training Manual	Materials		<input type="checkbox"/>
AAA	5	AVILAR	Avilar Training Room 1	Location		<input type="checkbox"/>
AAA	5	AVILAR	Projector	Equipment	P-1	<input type="checkbox"/>
AAA	6	AVILAR	Avilar Training Manual	Materials		<input type="checkbox"/>
AAA	6	AVILAR	Avilar Training Room 1	Location		<input type="checkbox"/>
AAA	6	AVILAR	Projector	Equipment	P-1	<input type="checkbox"/>
ADMINV53	4	AVILAR	Avilar Training Manual	Materials		<input type="checkbox"/>
ADMINV6	6	AVILAR	Avilar Training Manual	Materials		<input type="checkbox"/>
ADMINV6	13	AVILAR	Avilar Workbook	Materials		<input type="checkbox"/>
ADMINV6	14	AVILAR	Avilar Training Manual	Materials		<input type="checkbox"/>
ADMINV6	15	AVILAR	Avilar Workbook	Materials		<input type="checkbox"/>
CERTSURV	2	AVILAR	Avilar Workbook	Materials		<input type="checkbox"/>
CERTSURV	3	AVILAR	Avilar Training Manual	Materials		<input type="checkbox"/>
WMDEMO	6	AVILAR	Avilar Training Manual	Materials		<input type="checkbox"/>
WMV1	1	AVILAR	Avilar Benefits handbook	Materials		<input type="checkbox"/>

WebMentor LMS offers dozens of reports to help you find the information you need about organizations, groups, courses, sessions, and students. This image shows a report on which resources are being used with which courses.

all questions in a course • Question summary: individual questions in a course • Question summary: bar charts • Course survey • Review course assignments • Review course assignment grades • Assignment completion report • Course wait list status • Course rating

- *E-commerce*
 - *Review merchant accounts • Review supported currencies • Review electronic commerce models • Transaction report • Accounting report*

8. Briefly describe the process for creating ad-hoc reports in the LMS.

The server administrator can create ad-hoc queries on the database, save those queries for later reuse, and add the queries to any user's menus.

9. How many custom reports does the company typically develop for a client implementation of the LMS?

0

10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.

Most customers are satisfied with the standard reports.

11. Provide any other information or notes relevant to the "Reporting" section.

—

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?

- The LMS does not provide for multiple sites from a single client implementation.
- Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
- Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓

- Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
15
 3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
4
 4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.

One customer, careLearning.com, operates a multi-site environment with 420+ sites.

- End user-to-end user e-mail
Standard
 - End user-to-administrator e-mail
Standard
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Third-party
 - Live chats (for multiple end users)
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard

WebMentor LMS can handle many organizations at once with different user interfaces and management. This screen shows one organizational overview.

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

AVILAR WebMentor LMS Role: Organization Help | Logout

Avilar Technologies, Inc. (avilar) Organization Dashboard

Office Profile Administration Training Students Instructors Administrators Groups Financials Communication

Students			
Max. Students	Enrolled Students	Total Enrollments	Enrollments used
Unlimited	163	Unlimited	176

Administrators			
Administrator	Courses	Subscriptions	
Avilar administrator 1 (avadm1)	74	9	
Jane Q. Public (avilar)	74	9	

Groups			
Category	Group	Members	
Recreation	golf (golf)	4	

Instructors		
Instructor	ILT Courses	Online Courses
avilar Default Instructor (avilar)	8	64
Avilar Instructor 1 (avinst1)	8	66

Please e-mail any comments, questions or problems to qrobicki@avilar.com
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- Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Third-party
 - Live voice-over-IP
Unavailable
 - Virtual whiteboard
Third-party
 - Virtual presentations (e.g., PowerPoint-driven)
Third-party
 - Screencasting
Third-party
 - Application-sharing
Third-party
 - Ability to associate a wiki with a course
Third-party
 - Single-point Web camera capability
Third-party
 - Multiple-point Web camera capability
Third-party
 - Networking (e.g., ability for end users to connect with one another)
Third-party
 - Ability for each registered end user to have a blog
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
 4. Provide any other information or notes relevant to the “Collaboration and Communication” section.

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Unavailable
 - Handles transactions for physical items (e.g., books or CDs)
Unavailable
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
WebMentor LMS also handles purchase orders for course payment.
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles sales tax, including variations based on the state or region
Standard
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard

- Multiple shipping options can be configured for physical goods
Unavailable
 - Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Standard
 - Automatically maintains order status that can be checked by end user
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
 - Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify) ✓
- E-xact, Cybercash, Other payment gateways may be supported easily by adding additional ecommerce facets to the system.*
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
- Yes. WebMentor LMS relies on the payment gateway vendor to secure payment data. The LMS does not store credit card numbers or other sensitive data.*
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
- Paypal PayFlow Pro. Other payment gateways may be supported easily by adding additional ecommerce facets to the system.*
7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
- Yes*
8. Provide any other information or notes relevant to the "E-commerce" section.
-

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Live telephone support for end users
Standard
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Standard
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Standard
 - Self-serve, searchable knowledge base for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Quick-help and complete help files available for every screen.
 2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Completely custom
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Completely custom
 - Scheduled in-person training at client offices for administrators
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Monday through Friday, 8am - 5 pm Eastern, excluding holidays.
 4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Monday through Friday, 8am - 5 pm Eastern, excluding holidays.
 5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Monday through Friday, 8am - 5 pm Eastern, excluding holidays.
 6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Monday through Friday, 8am - 5 pm Eastern, excluding holidays.
 7. Briefly describe the company's typical ongoing communication with its LMS clients.
Monthly newsletters and semi-annual conference calls.
 8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
Avilar does not typically interact with LMS client end users, just administrators (besides the occasional support call).
 9. Provide any other information or notes relevant to the "Support and Training" section.

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
10%
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
Custom reporting, ecommerce extensions, integration with client systems, single sign-on.
4. Briefly describe the process for used for planning and implementing custom programming work.
Define requirements. Draft functional specification. Implement code. Test and debug. Deploy the code.
5. Please specify the location (by time zone) of personnel involved in custom programming.
-5 UTC
6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.
-8, -6, and -5 UTC
8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.
—

Blackboard Learn Blackboard

LMS Version: Release 9.1 (SP9)

Value proposition: *In today's challenging economic times, it is more important than ever for you to differentiate your association from other organizations and provide real value to your members. Delivering professional development and learning to constituents in a timely and convenient fashion is a sure way of demonstrating that value. While most associations offer some form of e-learning, rarely does it extend beyond live webinars or piecemeal content. Blackboard Learn is a learning and development platform that transforms traditional professional development into a truly engaging continuous learning experience. Due to our deep roots in higher education, we built our platform to focus on engagement and learning, not administrative reporting and tracking. The result? You'll offer your members training that incorporates rich media, is simple to use and always available.*

Top clients (associations): Mortgage Bankers Association • Verizon Foundation • American Council on Education (ACE) • American Library Association • Plumbing, Heating and Cooling Contractors • IUOE • American Physiological Society • CCIM • PCMA • Kansas Association of Addiction Professionals • American Society of Pension Professionals and Actuaries • National Center on Education and the Economy • Institute on Nuclear Power Operations • Certified General Accountants • National Strength and Conditioning Association • Shadow Mountain Ministries • GIA

Top clients (non-associations): Watson Pharmaceuticals • Westinghouse • ADP • Cincinnati Children's Hospital • LIM College • Laureate Education, Inc. • Strayer University • Social Security Administration • Air Force Institute of Technology • Civil Air Patrol, Defense Acquisition University • General Dynamics Information Technology • National Defense University • U.S. Army Training and Doctrine Command (TRADOC) • U.S. Naval Academy • Comcast • T Mobile • Walgreen's

URL for more information about the LMS:
<http://www.blackboard.com/Markets/Associations/overview.aspx>



Blackboard

Blackboard

650 Massachusetts Ave, NW
Sixth Floor
Washington, DC 20001-3796

888-719-6123

ProEdInfo@blackboard.com

<http://www.blackboard.com/associations>

Three-year pricing: \$100,000 to \$755,000

Hosting: By company or client



**Blackboard
ProEd**

Our Take on Blackboard Learn Some Highlights



With 5,500 LMS clients and 3,000 employees, Blackboard is by far the largest company participating in the report. The vast majority of its clients are in the academic market, where Blackboard is one of the biggest players. While the company's footprint in the association market is much smaller, its roster includes some sizable, well-known organizations like the American Library Association, the Mortgage Bankers Association, and the Professional Conventional Management Association.

Given its academic roots, it is not surprising that Blackboard Learn is strongest in instructor-led, facilitated learning. The system offers good options for delivering learning purely online or in combination with face-to-face events and helps associations, as the company puts it, “move beyond Webinars and self-paced courses.”

- With collaboration and social learning tools, like wikis and blogs, Blackboard Learn seeks to engage and support learners in both formal and informal learning.
- Blackboard Learn provides portfolio functionality that can enable members to showcase work and demonstrate progress toward certification.
- With Blackboard's academic bent, accessibility is a key issue. Release 9.1 includes advanced accessibility options that are Gold Level certified by the National Federation of the Blind for Non-Visual Accessibility.
- Blackboard Learn does not have its own e-commerce engine but can provide e-commerce through GoSignMeUp or Genius SIS.
- Blackboard has an extensive network of partners who provide content compatible with the Blackboard system and develop software applications to extend the system. While extra costs may apply, these partners can make it possible to address complex needs without time-consuming and expensive customizations. Blackboard also boasts an extensive and active user community.
- Blackboard Learn integrates with Blackboard Collaborate—the Webinar platform that came from Blackboard's 2010 acquisition of Elluminate and Wimba (additional costs apply). The integration not only allows for role-appropriate single-sign on (i.e., learners versus instructor access) but also passes attendance data between the two systems.
- Blackboard Learn supports gating of content (AKA locking or adaptive release). Learners can be required to self-report that an activity is complete (e.g., they read a chapter), or qualitative activities (e.g., posting to a discussion) or quantitative activities (e.g., attaining a passing score on an assessment) can control access to content to additional content.
- Since the last report, Blackboard Learn has redesigned its user interface to focus on usability. For example, the system now uses contextual menus based on hover locations; the Notifications dashboard now aggregates the various modules that previously showed alerts, what's new, and to-dos—basically anything that needs attention; and YouTube and other video is now lightboxed (meaning it's brought to forefront without leaving Blackboard—similar to how images and videos are viewed on Facebook).
- The latest visual text editor provides for integrated video—so users can record video directly from the from Blackboard text editor and add it as content to course (again think of Facebook, and how you can record a video message to post to someone's timeline without ever leaving Facebook).
- Learners can edit notification settings to specify how they receive alerts from Blackboard Learn, which can come via an impressively diverse array of channels: dashboard, e-mail, SMS, text to voice, and more.
- Blackboard Mobile Learn—an interface for learning on iOS, Android, BlackBerry, and webOS smartphones—is available via two different pricing models. An organization can license it for all users, or users can buy their own access (\$1.99/year or \$5.99 for life).

While Blackboard Learn is feature-rich, one area where associations may find it lacking is in the management of continuing education credit—a functionality that is not part of the standard system. For organizations focused on instructor-led training, however, Blackboard's experience in the academic market as well as its large global footprint and user base make it well worth a look.

General Company Information

1. When was the company founded?
1997
2. How many employees does the company currently have?
3,000
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
Blackboard Inc. is a leading provider of learning software applications and related services. The Blackboard Learn™ platform provides a foundation for creating an engaging learning process that delivers learning results rapidly, and drives a positive impact on our clients' businesses. Blackboard Collaborate™ provides a collaborative, interactive virtual classroom which engages learners through synchronous learning experiences. Blackboard Mobile™ extends Blackboard Learn by giving your employees and members access to much of the training content available in the web interface in an engaging and intuitive way on a variety of mobile devices including Android™, BlackBerry® and iPhone OS.
5. Provide the company's contact information.
*650 Massachusetts Ave, NW
Sixth Floor
Washington, DC 20001-3796
USA
ProEdInfo@blackboard.com
888-719-6123*
6. Provide the URL for the company's Web site.
<http://www.blackboard.com/associations>
7. Provide any other information or notes relevant to the "General Company Information" section.
Blackboard works with our clients to develop and implement technology to improve every aspect of education. We enable our clients to engage learners in exciting new ways, reaching them on their terms and devices—and connecting them

more effectively, keeping them informed, involved, and collaborating together. Through our innovative technology, services and expertise, we help build a better education experience.

Blackboard learn™

General LMS Information

1. What is the name of the LMS product?
Blackboard Learn
2. Provide the product version described in this survey response.
Release 9.1 (SP9)
3. When was the first version of the LMS initially released?
01/01/1998
4. Briefly describe the upgrade cycles for the LMS.
Major releases are approximately once to twice per year. We release enhancements and maintenance fixes more frequently through service packs.
5. How many associations use this LMS?
30
6. How many organizations in total use this LMS, including associations?
5,500
7. How many end users are registered in the single largest client implementation hosted by the company?
2,500,000
8. How many end users are registered in the single largest client implementation hosted by the client?
100,000
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
250,000,000

10. Briefly describe the value proposition for this LMS as it applies to associations.
- In today's challenging economic times, it is more important than ever for you to differentiate your association from other organizations and provide real value to your members. Delivering professional development and learning to constituents in a timely and convenient fashion is a sure way of demonstrating that value. While most associations offer some form of e-learning, rarely does it extend beyond live webinars or piecemeal content. Blackboard Learn is a learning and development platform that transforms traditional professional development into a truly engaging continuous learning experience. Due to our deep roots in higher education, we built our platform to focus on engagement and learning, not administrative reporting and tracking. The result? You'll offer your members training that incorporates rich media, is simple to use and always available.*
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
- 499 or fewer registered end users
5%
 - 500 to 2,499 registered end users
10%
 - 2,500 to 4,999 registered end users
40%
 - 5,000 to 9,999 registered end users
15%
 - 10,000 to 24,999 registered end users
20%
 - 25,000 or more registered end users
10%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of individual members in the association?
- 1,000 or less
75%
 - 1,001 to 5,000
10%
 - 5,001 to 10,000
5%
 - 10,001 to 25,000
10%
 - 25,001 to 50,000
0%
 - 50,001 to 100,000
0%
 - More than 100,000
0%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of organizational members in the association?
- Less than 100
0%
 - 101 to 200
0%
 - 201 to 500
0%
 - 501 to 1,000
10%
 - 1,001 to 5,000
40%
 - More than 5,000
50%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
- Sales training, leadership training, continuous learning environments.*
15. Please list the company's top association clients.
- Mortgage Bankers Association • Verizon Foundation • American Council on Education (ACE) • American Library Association • Plumbing, Heating and Cooling Contractors • IUOE • American Physiological Society • CCIM • PCMA • Kansas Association of Addiction Professionals • American Society of Pension Professionals and Actuaries • National Center on Education and the Economy • Institute on Nuclear Power Operations • Certified General Accountants • National Strength and Conditioning Association • Shadow Mountain Ministries • GIA*

16. Please list the company's other (non-association) top clients.
- Watson Pharmaceuticals • Westinghouse • ADP • Cincinnati Children's Hospital • LIM College • Laureate Education, Inc. • Strayer University • Social Security Administration • Air Force Institute of Technology • Civil Air Patrol, Defense Acquisition University • General Dynamics Information Technology • National Defense University • U.S. Army Training and Doctrine Command (TRADOC) • U.S. Naval Academy • Comcast • T Mobile • Walgreen's*
17. Provide a URL for more information about the LMS.
- <http://www.blackboard.com/Teaching-Learning/Learn-Platform.aspx>*
18. Provide any other information or notes relevant to the "General LMS Information" section.
- Blackboard supports more than 5,500 clients and millions of learners every day. Whether you are starting small with less than 200 users, or looking to run large implementations of 50,000 or more, Blackboard has the experience to help you reach your goals.*

LMS Implementation

1. In calendar days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

90

Typical

28

Simple

7

2. Briefly describe the implementation process.
- 1) Installation/configuration and Network Configuration 2) Implementation Strategy 3) Training 4) Integration 5) Deployment*
3. Briefly describe the company personnel (by role) involved in the LMS implementation.
- *Project Manager: Responsible for the proper implementation of the project. Specifically, this individual schedules and leads team meetings, develops and distributes all documentation, and manages the project plan. The PM also maintains individual task schedules, personnel assignments, and budgeting information, and serves as the client's primary point of contact throughout the project. In addition, and as the system requirements are defined, the PM will assign the appropriate technical talent.*
 - *Technical Consultant: Responsible for all tasks related to the Blackboard installation as well as for mentoring system administrative staff through the installation. Technical Consultants also perform hands-on, technical knowledge transfer of best practices for system maintenance.*
 - *Strategy/Functional Consultant: Leads the session that defines the strategic roadmap of the Blackboard functional launch plan in addition to providing hands-on configuration best practices, discussing integration methods and needs, and defining the scope of any additional, high-level integration and customization requirements.*
 - *Senior Manager: Working in tandem with the Project Manager and Technical Consultant, gives strategic direction and executive sponsorship to the project. This individual meets with the Blackboard project team regularly to assess progress and ensures that the project is properly positioned for success. The Senior Manager is always available to both the project team and the client should any project issues arise.*

- Please specify the location (by time zone) of company personnel involved in implementation.

All time zones (-12 to +14 UTC)

- Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.

Project Manager, System Administrator, Information Technology (IT) team.

- Provide any other information or notes relevant to the “LMS Implementation” section.

Blackboard has 15 global offices across 4 continents, and over 150 technical consulting resources located around the world to support client implementations.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

- For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$65,000
 - 2,500
\$130,000
 - 5,000
\$190,000
 - 10,000
\$225,000
 - 25,000
\$285,000
- For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$100,000
 - 2,500
\$290,000
 - 5,000
\$370,000
 - 10,000
\$575,000
 - 25,000
\$755,000
 - Unlimited
Not available
- For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$35,000
 - 2,500
\$85,000
 - 5,000
\$104,000
 - 10,000
\$123,000
 - 25,000
\$136,000
 - Unlimited
Not available

4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$108,500
 - 2,500
\$263,500
 - 5,000
\$322,400
 - 10,000
\$381,300
 - 25,000
\$421,600
 - Unlimited
Not available
5. Briefly describe the pricing model for the LMS.
Recurring cost based on number of active users. Users can be swapped in and out, or made inactive at the user or course level.
6. Briefly describe the payment schedule.
Annual for software, services priced per project.
7. Briefly describe pricing for additional services.
Services are priced time and materials for services rendered.
8. Provide any other information or notes relevant to the “Pricing” section.
We work with our clients to provide pricing based on usage of our product. Prospective clients should discuss their intended use and needs with a Blackboard sales representative. We have solutions starting at \$9,500 per year. The numbers above are representative of full-time students (i.e. students accessing multiple times a week throughout an entire year).

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Windows Server® 2008 (64-bit) • Windows Server 2008 RS (64-bit) • RedHat® Enterprise Linux® Server 5, 64-bit • RedHat Enterprise Server 6, 64-bit • Solaris 10 64-bit SPARC • Oracle® 10G R2, 64-bit • Oracle 11G R1, 64-bit • SQL Server 2008, 64-bit • SQL Server 2008 R2, 64-bit
2. Briefly describe the technical framework and code structure of the LMS.
Blackboard is a web-based Java application backed by a relational database (MS SQL Server or Oracle) with a front-end enterprise web server (IIS or Apache).
3. Briefly describe the LMS’s ability to share data for the purposes of migration and integration.
Data is stored in an openly accessible database (Oracle or SQL Server), and there are Java APIs to protect referential integrity of the data.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
There are no scaling limits imposed by the Blackboard Learn platform. The ability for the system to expand vertically and horizontally, as well as to employ hybrid-scaling approaches, is inherent in its design. The application and database tier clustering inherent in the product permit deployments to distribute user requests and backend services among multiple cooperating Web/Application and Database servers. These clusters can be extended continuously and seamlessly, allowing effective horizontal scaling and add-on of components to avoid costly upfront hardware purchases. Blackboard has some of the largest LMS implementations in the world (US Army, SENA - job training for the entire country of Columbia, Pearson Course Compass, Fairfax County Public Schools, State of New Mexico, etc.).

- Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.

A Blackboard Administrator can set storage quota limits and bandwidth restrictions, but the software does not impose any specific limits. Infrastructure can be scaled to meet demand.

- Provide any other information or notes relevant to the “Technology” section.

—

System Requirements

- What are the technical requirements for an end user to access the LMS?
 - Windows XP (32-bit), Vista (32-bit), and Vista (64-bit)
 - Internet Explorer 8 and 9, Firefox 3.6, Firefox (Final Release Channel)
 - Windows 7 (32-bit) and Windows 7 (64-bit)
 - Internet Explorer 8 and 9, Firefox 3.6, Firefox (Final Release Channel), Google Chrome
 - Mac OSX 10.5
 - Safari 5.0, Safari 4.0, Firefox 3.6, Firefox (Final Release Channel), Google Chrome
 - Mac OSX 10.6
 - Safari 5.0, Safari 4.0, Firefox 3.6, Firefox (Final Release Channel), Google Chrome
 - Mac OSX 10.7
 - Safari 5.0, Safari 4.0, Firefox 3.6, Firefox (Final Release Channel), Google Chrome
- What are the technical requirements for an administrator to access the LMS?

Same as above.

Integration and Interoperability

- What percentage of client implementations involve at least one integration?

50%
- Briefly describe the typical types of integration for the LMS.

Blackboard can be configured for inbound and outbound data integration as well as configured for single sign-on or LDAP authentication. Blackboard contains an integration framework

that allows flat file, XML and web service integration. Blackboard also maintains a full open API data set. The Blackboard Web Services framework supports real-time read/insert/update/delete of common entities and associations in the application including users, courses, memberships, roles, categories, content, and gradable results. This framework can also be leveraged to create user-defined web services that have access to Blackboard data via the underlying product API. The framework features built-in security such as authorization (access control list), authentication (accessing account can only manage data that is available to that account), and SSL support. Web services are interoperable and can be invoked by any programming language that can consume the WSDL. The system reporting database can also be queried directly or by an advanced reporting tool such as BIRT (Eclipse) reports.

- Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.

SQL, ODBC, Web Services or Java API driven.
- Briefly describe the process used for planning and implementing integration between the LMS and another system.

*1) Data mapping session with central authority
2) Define business events and rules
3) Extraction and formatting
4) Automated update to mirror data in Blackboard based on business events
5) Knowledge transfer on data integration process*
- With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect ✓
 - Illuminate ✓
 - Genesys ✓
 - GoToWebinar ✓
 - Microsoft Live Meeting ✓
 - ReadyTalk ✓
 - WebEx ✓
 - Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.

- Other (please specify) ✓
Blackboard Collaborate (Wimba and Elluminate)
6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
- Aptify (Aptify) ✓
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid)
 - CRM for Members (ProTech)
 - iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap)
 - netFORUM (Avecetra)
 - Office Manager (internet4associations)
 - Personify (TMA Resources) ✓
 - TIMSS (TMA Resources) ✓
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS
 - The LMS has never been integrated with an AMS.
 - Other (please specify) ✓
Blackboard can technically integrate with any of these systems. The integration is done at the database level and our clients have done hundreds of integrations to Oracle and SQL Server based systems.
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
- ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke ✓
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server ✓
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS.
- Other (please specify) ✓
Integrations have been done at a database client level. Blackboard provides web content management as part of the content delivery platform. It can also utilize other web content management solutions that provide URL access to the content in their repository.
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
- No*
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
- Yes. GoSignMeUp (<http://www.gosignmeup.com>) and Genius SIS.*
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
- No. Blackboard does not require content authoring tools to certify their integrations with Blackboard. Many content authoring tools (such as Lectora, etc.) have options to publish directly into Blackboard or an industry standard learning object format that Blackboard can deliver. The following link indicates our official partners in this area: <http://www.blackboard.com/Communities/Partners/Partners-List.aspx>.*
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
- Yes. QuestionMark & Respondus.*
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
- Yes. CourseEval.*

13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.

Yes. NBC Learn, YouTube, Flickr, Slideshare, McGraw Hill, Pearson, Cengage, Wiley+. The following link indicates our official partners in this area: <http://www.blackboard.com/Partnerships/Extensions.aspx>.

14. Provide any other information or notes relevant to the “Integration and Interoperability” section.

—

Standards and Guidelines

- Does the LMS produce content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium ✓
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508 ✓
 - The LMS does not produce content that conforms to any of these guidelines or standards.
 - Other (please specify)
- Can the LMS play content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium ✓
 - Medbiquitous
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
- Provide any other information or notes relevant to the “Standards and Guidelines” section.

—

Hosting

- Is the LMS available as a *company-hosted* solution?

Yes
- How many LMS installations are hosted by the *company*?

750
- Is the LMS available as a *client-hosted* solution?

Yes
- How many LMS installations are hosted by the *client*?

4,750
- How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
- If the company’s LMS hosting is provided by a partner or partners, please list the name(s).

Not applicable
- Briefly describe the company’s preferred or recommended hosting option.

Using Blackboard Managed Hosting Services.
- If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.

Blackboard offers 99.9% uptime SLA. We work with our clients to schedule down time during optimal periods.
- If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing
 - Yes, when requested for an additional fee ✓
 - No
 - Not applicable because the company does not host LMS installations

10. Provide any other information or notes relevant to the “Hosting” section.

—

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?

No

2. Can end users specify their preferred language (which may differ from the default site language)?

Yes

3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?

Yes

4. Does the LMS support the ability to recommend courses based on end users’ prior activities, profile data, or role in the system?

Yes

5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?

Yes

6. Provide any other information or notes relevant to the “Personalization” section.

—

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).

Yes. Blackboard ships with several built-in themes which can be leveraged to create multiple brands. Brand colors and layouts can be customized through the UI. Themes and brands can also be developed/customized using cascading style sheets (CSS).

2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).

Yes. Blackboard ships with several built-in themes which can be leveraged to create multiple brands. Brand colors and layouts can be customized through the UI. Themes and brands can also be developed/customized using cascading style sheets (CSS).

3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.

Yes. 1) Dashboard modules. 2) Tabs and modules driven by user role(s). 3) GUI interface privileges to specified.

4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.

Yes. 1) Dashboard modules. 2) Tabs and modules driven by user role(s). 3) GUI interface privileges to specified.

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.

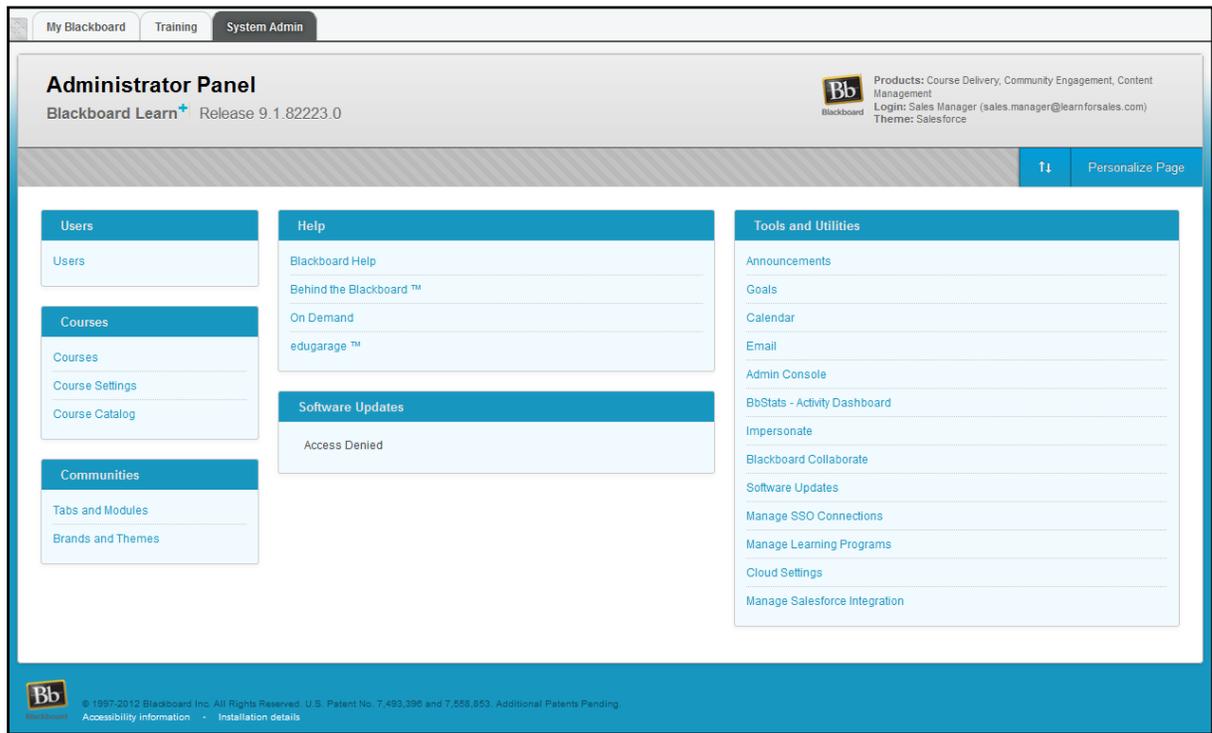
Yes. 1) Dashboard modules. 2) Tabs and modules driven by user role(s).

6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.

Yes. 1) Dashboard modules. 2) Tabs and modules driven by user role(s).

7. Provide any other information or notes relevant to the “Interface Configuration” section.

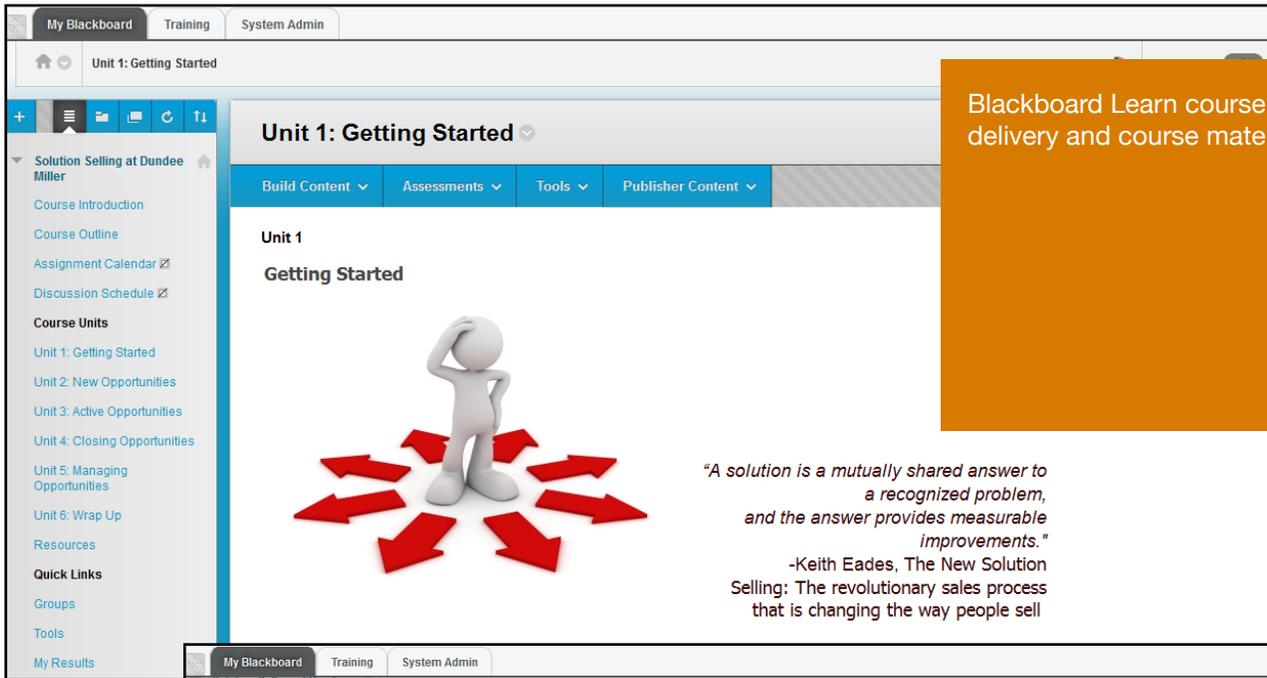
—



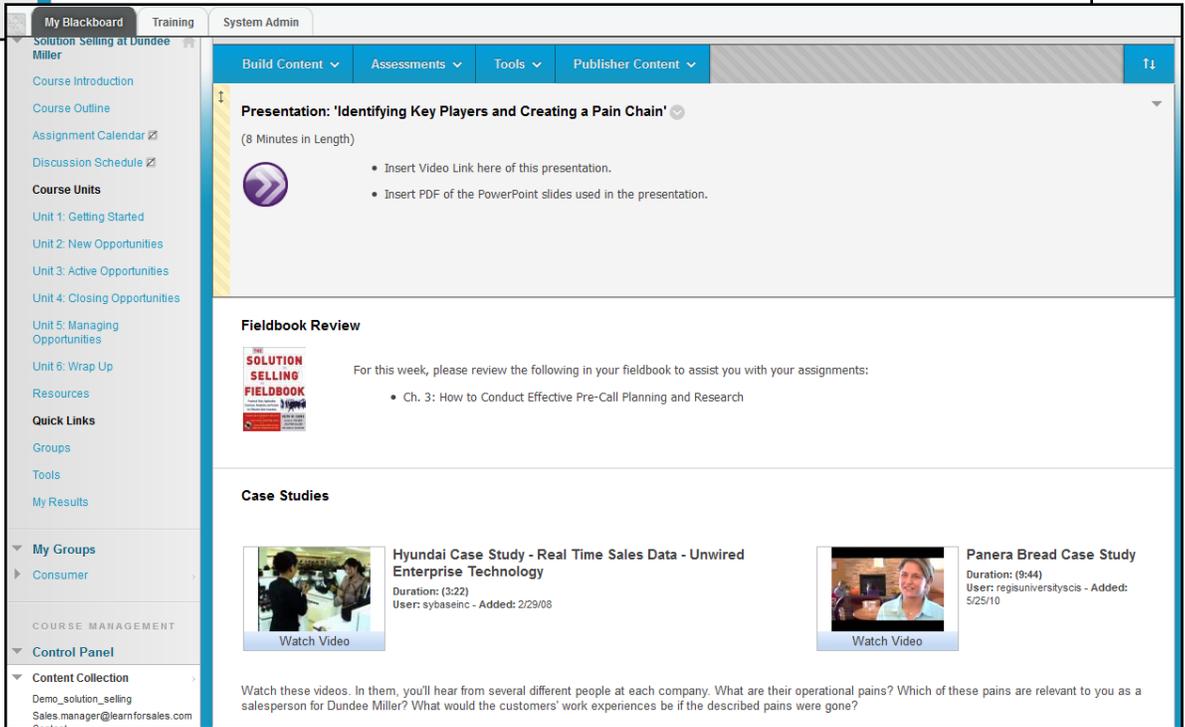
Blackboard Learn administrative panel

Internationalization and Localization

- Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
- Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
- Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
- Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
Yes
- Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes
- In how many countries has the LMS been implemented for clients?
60
- Please list the countries where the LMS has been implemented for a client.
Australia, Bahrain, Bermuda, Botswana, Brazil, Cayman Islands, Chile, Colombia, Costa Rica, Croatia, Cyprus, Czech Republic, Ecuador, Egypt, Estonia, France, Greece, Honduras, Hong Kong, India, Indonesia, Italy, Jamaica, Japan, Jordan, Kenya, Kuwait, Lebanon, Lithuania, Macau, Malaysia, Malta, Mexico, Netherlands Antilles, New Zealand, Nigeria, Oman, Panama, Peru, Philippines, Poland, Portugal, Puerto Rico, Qatar, Romania, Russian Federation, Saudi Arabia, Singapore, Slovenia, South Africa, South Korea, Spain, Taiwan, Thailand, The Bahamas, The Netherlands, Trinidad and Tobago, Turkey, United Arab Emirates, United Kingdom, Venezuela, Vietnam, Virgin Islands (U.S.).



Blackboard Learn course delivery and course materials



8. In how many languages has the LMS been implemented for clients?

18

9. Please list the languages in which the LMS has been implemented for a client.

English US, Swedish, Finnish, German, China (Simplified), China (Traditional), English UK, French, Spanish, Arabic, Korean, Japanese, Portuguese, Italian, Dutch, Russian, Polish, Turkish.

10. How many language packs are available for the *end-user* view of the LMS?

18

11. Please list the languages for which a language pack is available for the *end-user* view.

There are over 18 language packs available... see list above.

12. How many language packs are available for the *administrator* view of the LMS?

18

13. Please list the languages for which a language pack is available for the *administrator* view.
There are over 18 language packs available... see list above.
14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
Blackboard has a language pack editor where clients can either change existing language packs, or create new ones. The list of languages is constantly growing. Some languages are packaged out-of-the-box and others can be downloaded from our web site: <http://www.blackboard.com/Support/Extensions.aspx#tab5dvLPack>. The languages can be set at the installation/system level, course/organization level, and down to an individual level.
- The LMS does not support search by end users.
 - Other (please specify)
3. What types of search are available to *administrators* in the LMS?
- Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify)
4. Provide any other information or notes relevant to the “Search and Catalogs” section.
-

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users ✓

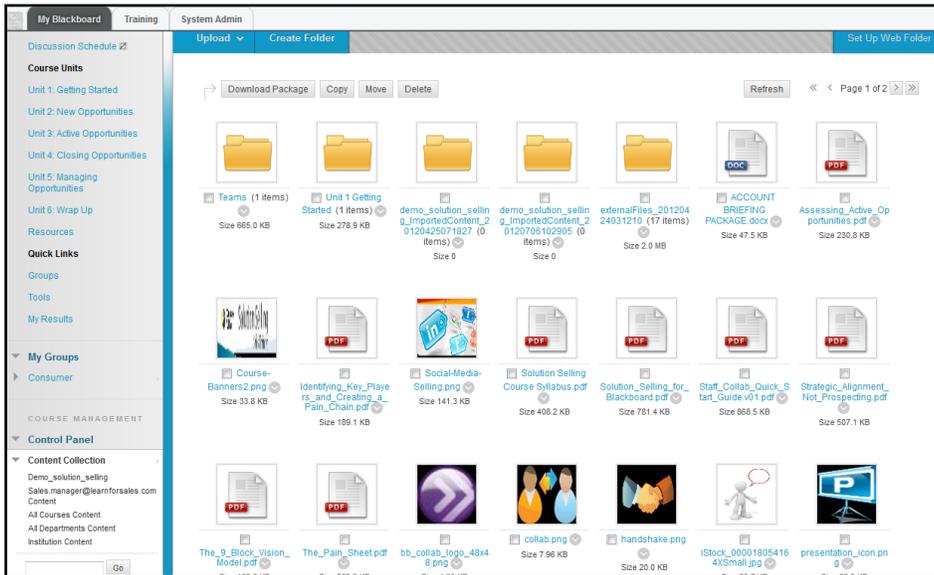
Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education ✓
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)

2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course.
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user's status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)
3. Does the LMS provide the ability to author learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
You can create a course using a master template, course wizard, and other methods. Content can either be authored in the
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
The Blackboard Visual Text Editor lets you easily embed or attach rich media in a variety of formats.
5. Does the LMS support offline authoring of learning content?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
In a 3rd party authoring tool, but not Blackboard. Blackboard is a web application that requires online access to author content.

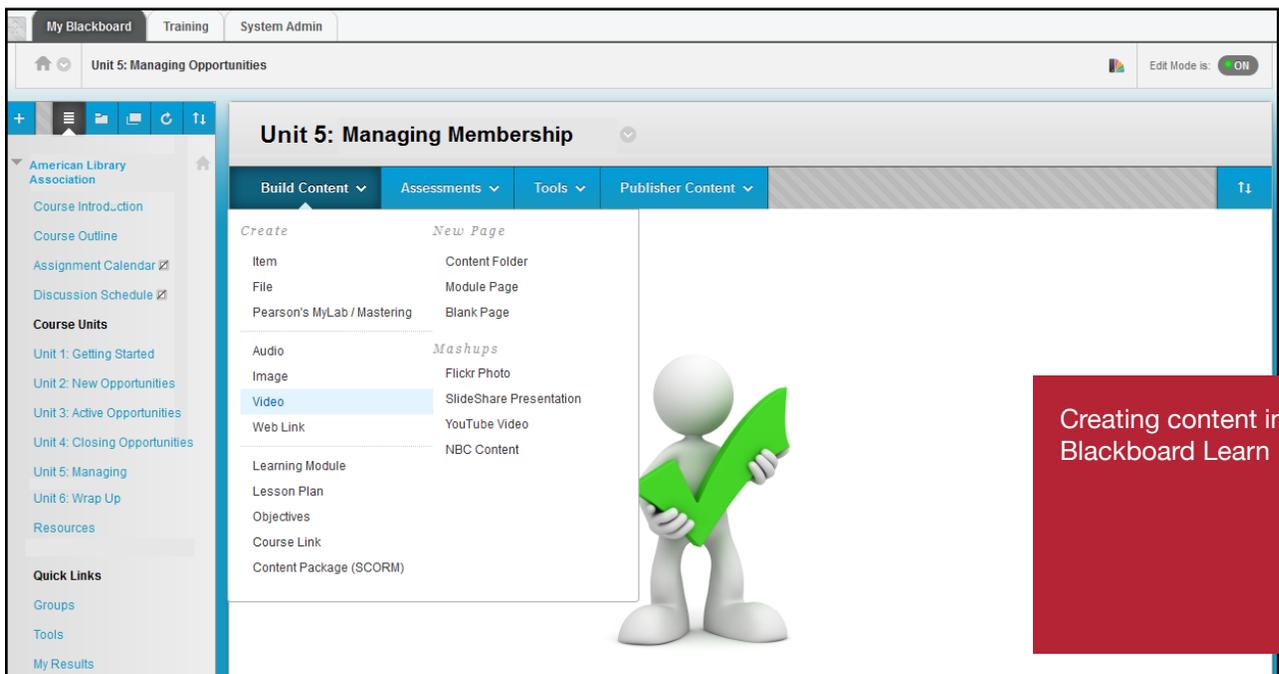
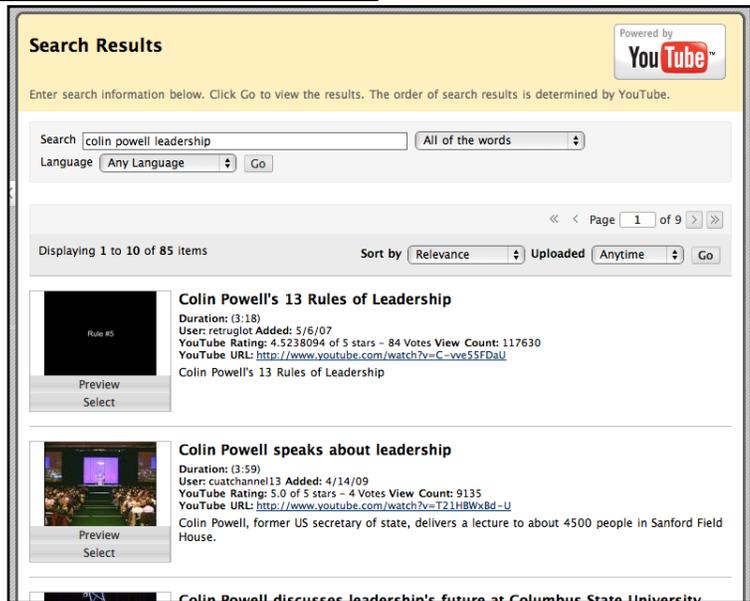
Blackboard Learn course administration

Status	Course ID	Course Name	Date Created	Instructor Username	Instructor Name	Data Source Key
	123	GuardianMedia Coruse	9/14/11 4:29 AM			SYSTEM
	CRM101	Market Positioning	6/28/11 5:00 PM	administrator	Blackboard Learn Administrator	SYSTEM
	DM_ONBOARD	Dunder Mifflin First 100 Days	1/5/12 1:08 PM	proed, administrator	ProEd Admin, Blackboard Learn Administrator	SYSTEM
	Doors101	Lines of Business - Doors	8/26/11 10:26 AM			SYSTEM
✗	FB_100_Foundations	Facebook 1st 100 days (alt design)	9/12/11 5:50 PM	proed	ProEd Admin	SYSTEM
✗	FB_100_ProdFoundations	Facebook 1st 100 days	9/12/11 9:49 AM	proed	ProEd Admin	SYSTEM
	GRANT	Being a Part of Vodafone	7/11/12 4:53 AM	sales.manager@learnforsales.com	Sales Manager	SYSTEM



Managing content in Blackboard Learn

Mashups with YouTube and SlideShare



Creating content in Blackboard Learn

6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Check in/check out functionality
Standard
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Standard
 - Ability to monitor progress on tasks
Standard
 - Ability to add internal comments (viewable only by other administrators) to content
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
8. Can the LMS generate printer-friendly content?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
All browsers have the ability to print a web page or frame. Reports can be generated in HTML, PDF, Word, or Excel format.
9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
For content in the learning environment, it is standard. For assessments, third parties have created secure browsers that restrict certain browser functionality.
10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Browser-delivered online content ✓
 - Downloadable version ✓
 - CD or DVD ✓
 - HTML ✓
 - SWF ✓
 - PDF
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or

may not be the company's own tool).

Depends on the content of the course... video authoring tools are going to be different than text or image authoring tools.

20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.

—

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Third-party
 - Personnel management (for scheduling instructors and facilitators)
Standard
 - Facility management (for scheduling rooms)
Third-party
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Third-party
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Standard

2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.

Yes. Typically to collect and deliver presentations after the conference, and connect speakers with individuals who may have questions after the session ends.

3. Provide any other information or notes relevant to the “In-person, Place-based Courses” section.

—

Webinars

1. Does the LMS provide integrated Webinar functionality?

- Standard ✓
- Semi-standard
- Completely custom
- Third-party
- Unavailable
- If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).

Blackboard features a synchronous learning tool (Blackboard Collaborate, formerly Elluminate/Wimba) that is available as an additional module to the Learn/LMS platform. Blackboard also integrates with a number of third party webinar tools such as Adobe Connect, Saba Centra, and WebEx.

2. Briefly describe the company’s preferred or recommended Webinar software.

Blackboard Collaborate, formerly Elluminate/Wimba.

3. Provide any other information or notes relevant to the “Webinars” section.

Blackboard Collaborate™ provides a collaborative, interactive virtual classroom which engages learners through synchronous learning experiences.

Registration

1. How can end users be registered in the LMS?

- By self-registration ✓
- By registration code or key ✓
- By an administrator registering end users one by one ✓
- By an administrator performing a bulk upload ✓
- As the result of an e-commerce purchase ✓
- By self-registration with administrator approval ✓
- Other (please specify)

2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?

Yes

3. Does the LMS provide secure authentication for end users with a valid log-in and password?

Yes

4. Does the LMS provide self-serve password recovery help for end users?

Yes

5. Can administrators define new *end-user* roles with distinct rights and access in the site?

Yes

6. Can administrators define new *administrator* roles with distinct rights and access in the site?

Yes

7. Can the fields for end user profiles be added, edited, and deleted?

Yes

8. Is the content of profile fields updatable by end users if allowed by administrator?

Yes

9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?

Yes

10. Provide any other information or notes relevant to the “Registration” section.

—

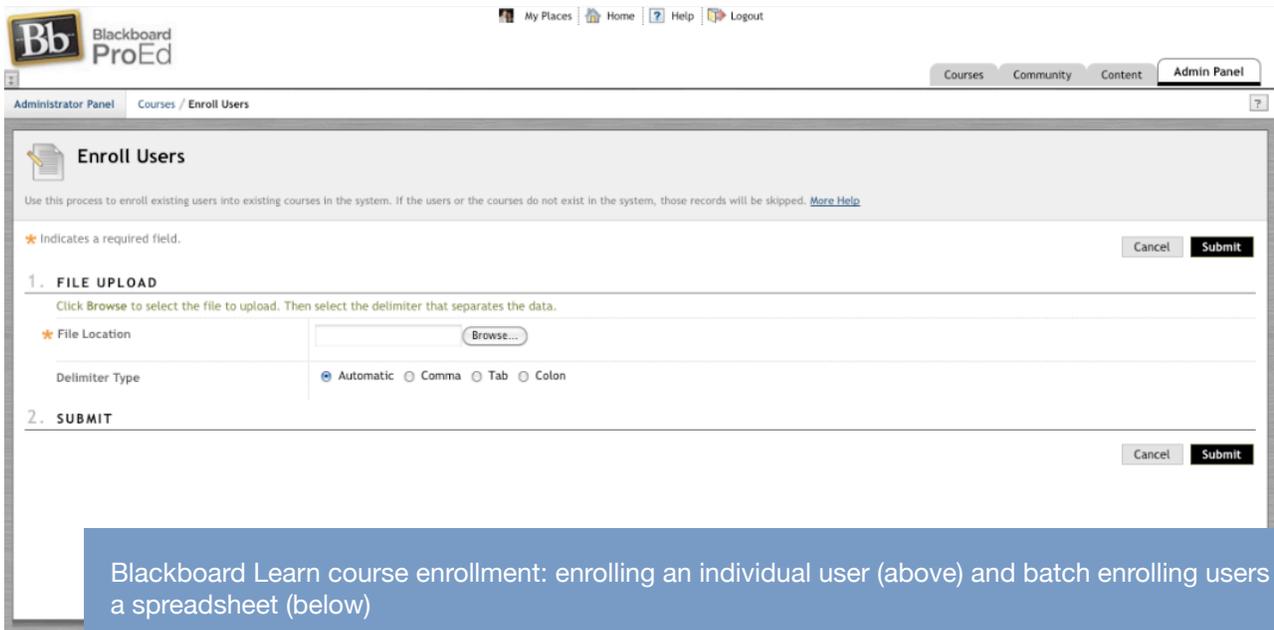
Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes
3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level
 - By course group
 - On a course-by-course basis ✓
 - On an end user-by-end user basis
 - Other (please specify)
4. Can enrollments occur based on end user-specific criteria?
 - The end user's role in the system ✓
 - The end user's score on an assessment ✓
 - The end user's completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)
5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes
6. Provide any other information or notes relevant to the "Enrollment" section.
—

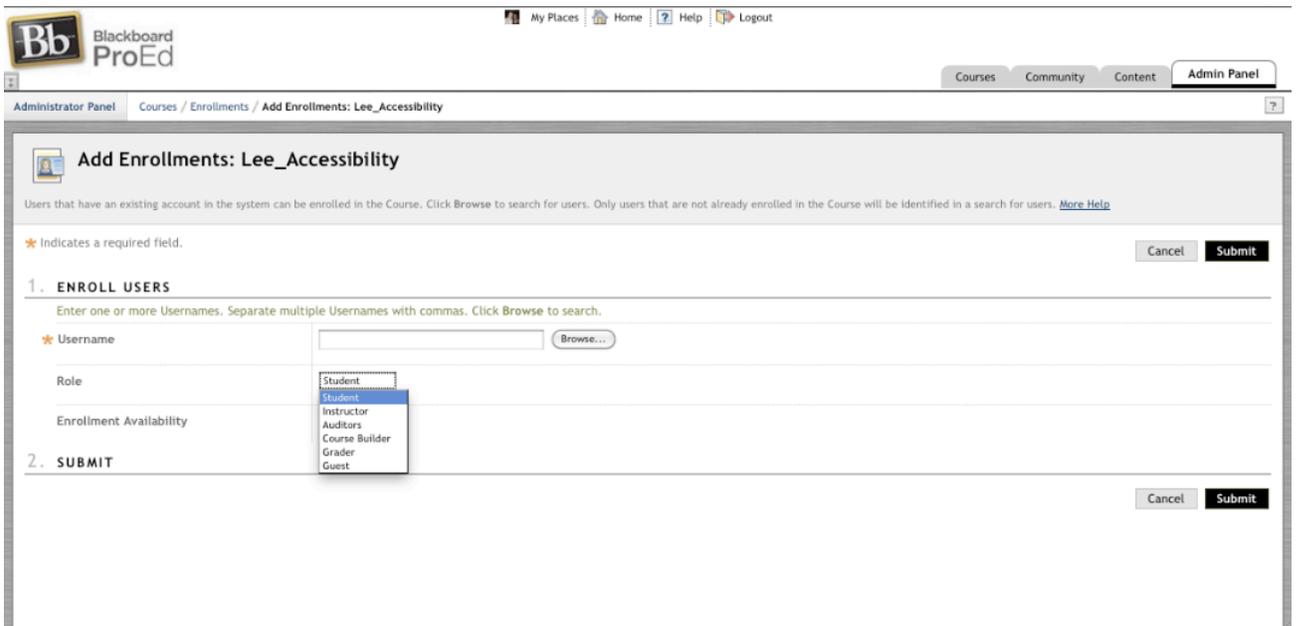
Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
No
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
No
3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS)
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS)
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement)
 - The LMS does not allow credit to be assigned to learning content. ✓
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload

- By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
- By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload
- By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify) ✓
- Prior knowledge can be uploaded to our grade center, but typically we only have knowledge of user activity/performance delivered by Blackboard.*
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?



Blackboard Learn course enrollment: enrolling an individual user (above) and batch enrolling users from a spreadsheet (below)



- By the user claiming the credit
 - By the user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
- Yes, on a sitewide basis
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines)
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No ✓
 - Other (please specify)
Third party partners can offer these services.
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline)
 - No ✓
 - Other (please specify)
Third party partners can offer these services.
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
No
12. Can end users view and print their own transcripts?
No
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
Yes. Demonstrate student achievement e-Portfolios are recognized for encouraging reflective learning, demonstrating academic achievement and providing opportunities for evidenced-based learning. However, many solutions are difficult to integrate with other academic systems. Blackboard e-Portfolio technology enables students and educators to assemble and share information online—all within the same system where learning content resides.
14. How many clients use the LMS to manage continuing education or certification?
30
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE) ✓
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university ✓

- No clients are using the LMS to manage continuing education or certification.
 - Other (please specify)
16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.
- Many of our clients deliver and manage the learning aspects of continuing education and certification on our platform; however, Blackboard is generally integrated with a 3rd-party system for the tracking of training.*

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?
Yes
4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
 - Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment) ✓
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
 - Per question ✓
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option ✓
 - Based on which distracter the end user selected ✓
 - Per assessment ✓
 - Based on the end user’s overall performance on the assessment ✓
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
Yes
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
Yes
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
 - Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.

- The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment)
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)

17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order) ✓
 - Hotspot questions (where users must select the correct area of a graphic) ✓
 - Drag-and-drop questions
 - Other (please specify) ✓
Essay, Short Answer, File Response, Opinion or Likert scale, Calculated Formulas, Quiz Bowl
18. Provide any other information or notes relevant to the “Assessments” section.
—

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
Yes

5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated)
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row) ✓
 - Matrix of choices (multiple answers per row) ✓
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields
 - Date fields
 - Time fields
 - Demographic information

- Other (please specify)

11. Provide any other information or notes relevant to the “Evaluations” section.
—

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports ✓
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users’ profiles or store additional metadata on courses) ✓
 - Other (please specify) ✓
BIRT
5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)

6. How many standard, pre-configured reports are available in the LMS?

14

7. List and briefly describe the standard, pre-configured reports available in the LMS.

The out-of-the-box reports that come with the Blackboard Learn are:

- *System Reports:*
 - ▶ 1) *Overall Summary of Usage*
 - ▶ 2) *User Statistics*
 - ▶ 3) *Course Statistics*
 - ▶ 4) *Site Page Views*
- *Course Reports*
 - ▶ 1) *Access by Content Area*
 - ▶ 2) *Access by Forum*
 - ▶ 3) *Access by Group*
 - ▶ 4) *Overall Summary of Usage*
 - ▶ 5) *Performance Dashboard*
- *Dashboard Modules*
 - ▶ 1) *What's New*
 - ▶ 2) *Needs Attention*
 - ▶ 3) *Alerts*
 - ▶ 4) *ToDo*
 - ▶ 5) *Report Card*

8. Briefly describe the process for creating ad-hoc reports in the LMS.

Report writers can create queries and reports against the main database via Blackboard's Open Database initiative or the statistical reporting database. Developers could also extract data from Blackboard using our open APIs or Web Services and then report on the data locally.

9. How many custom reports does the company typically develop for a client implementation of the LMS?

0

10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.

Clients typically do it themselves. Blackboard Consulting may create one or two reports depending on the client. Reports include: Data integration, grades, attendance.

11. Provide any other information or notes relevant to the "Reporting" section.

—

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
 - Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?

—
3. On average, how many sites are part of a client's multiple-site implementation of the LMS?

—
4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.

It is difficult to know exactly how many clients because almost all large organizations have multi-site implementations. Small organizations typically don't require it. It is hard to say how many sites are part of a client's multiple-site implementation of the LMS. It varies based on the client.

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Standard
 - End user-to-administrator e-mail
Standard
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Standard
 - Live chats (for multiple end users)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Standard
- Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard
- Live voice-over-IP
Standard
- Virtual whiteboard
Standard
- Virtual presentations (e.g., PowerPoint-driven)
Standard
- Screencasting
Standard
- Application-sharing
Standard
- Ability to associate a wiki with a course
Standard
- Single-point Web camera capability
Standard
- Multiple-point Web camera capability
Standard
- Networking (e.g., ability for end users to connect with one another)
Standard
- Ability for each registered end user to have a blog
Standard
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

 3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
 4. Provide any other information or notes relevant to the "Collaboration and Communication" section.
Blackboard Collaborate™ provides a collaborative, interactive virtual classroom which engages learners through synchronous learning experiences.

The screenshot displays the Blackboard interface for a forum. The forum title is "Forum: Membership Training Wiki". Below the title, there is a table of forum threads. One thread is visible, titled "Membership Training" by "Sales Manager", published on "8/29/12 11:23 AM". A context menu is open over this thread, showing various actions such as "Open", "Mark as Read", "Set Flag", "Publish", "Hide", "Lock", "Collect", and "Delete". A yellow callout box with the text "A wiki in Blackboard Learn" is overlaid on the screenshot.

E-commerce

- Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Third-party
 - Handles transactions for online courses
Third-party
 - Handles transactions for other online items (e.g., PDF study guides)
Third-party
 - Handles transactions for physical items (e.g., books or CDs)
Third-party
 - Automatically handles payment by credit card (no manual intervention needed)
Third-party
 - Handles payment by check (manual intervention needed)
Third-party
 - Handles payment by invoice (manual intervention needed)
Third-party
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
- How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles sales tax, including variations based on the state or region
Third-party
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Third-party
 - Multiple shipping options can be configured for physical goods
Third-party
 - Customizable e-mail message to users making the purchase
Third-party
 - Automatic e-mail message on purchase to administrators
Third-party

- Customizable e-mail message to administrators
Third-party
 - Automatically maintains order status that can be checked by end user
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Third-party
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Third-party
 - Handles discounts (e.g., by accepting discount codes)
Third-party
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
-
- 2Checkout
 - Authorize.Net
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow
 - PayPal Website Payments
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify)
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
- No*
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
- GoSignMeUp and Genius SIS.*
7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
- Yes*
8. Provide any other information or notes relevant to the "E-commerce" section.
-
- ### Support and Training
1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Third-party
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Third-party
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Standard

- Self-serve, searchable knowledge base for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
For end user support, end users need to contact the administrator at the host organization for support. Full telephone, email, and knowledge base support is available for administrators.
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Standard
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Standard
 - Scheduled in-person training at client offices for administrators
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Blackboard Student Services, formerly Presidium, is a recommended provider for end-user support, if needed.
4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Standard 24x7.
5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Blackboard Student Services, formerly Presidium, is a recommended provider for end-user support, if needed.
6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Standard 24x7
7. Briefly describe the company's typical ongoing communication with its LMS clients.
Regular email updates and use of web sites including: <https://connections.coursesites.com>, <https://behind.blackboard.com>, <http://www.blackboard.com/Platforms/Learn/Resources/Community-Programs.aspx>.
8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
This is typically managed by the organizations themselves. Blackboard only provides ongoing communication with the administrators on file.
9. Provide any other information or notes relevant to the "Support and Training" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)

2. What approximate percentage of your client implementations to date have involved custom programming work?

30%

3. Briefly describe the typical custom programming services provided for client implementations of the LMS.

Customization or extension of the core platform can be provided under a separate statement of work with Blackboard Consulting Services.

Typical engagements of this nature include: 1) Advanced integration with existing systems 2) Custom extensions/enhancements to the core platform 3) Custom reports or reporting views.

4. Briefly describe the process for used for planning and implementing custom programming work.

Blackboard Consulting Services will work with the client through all phases of the development life cycle. 1) Scoping and requirements gathering 2) Design 3) Development 4) Iterative review and testing 5) User acceptance testing and QA 6) Deployment and go-live support.

5. Please specify the location (by time zone) of personnel involved in custom programming.

All time zones (-12 to +14 UTC)

6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?

- Yes, through company personnel
- Yes, through a partner ✓
- No
- Other (please specify)

7. Please specify the location (by time zone) of personnel involved in custom content development.

All time zones (-12 to +14 UTC)

8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.

Blackboard has 15 global offices across 4 continents, and over 2500 employees located around the world. We also have an active user community developing applications, more info: www.edugarage.com.

BlueVolt BlueVolt

BlueVolt

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<http://www.bluevolt.com>



Industry focus: manufacturing and distribution for construction and building

LMS Version: v.9.29.13251.0

Value proposition: *For the Co-Op, Association, Buying Group or other Member Organization, the benefit BlueVolt offers is that they are able to deliver a world-class online learning program to their members at a very low cost. The LMS allows the association to connect its supplier members directly to their distributor members, in a way that they want and are unable to do on their own. Supplier can train their sales channel and reach the individuals in those sales organizations directly. This enhances the association's position in comparison to their competitors and establishes a significant barrier to entry for any other new organization trying to gain a foothold.*

Top clients (associations): *IMARK Group • BLUE HAWK • Sphere 1 • Evergreen Marketing Group • Affiliated Distributors*

Top clients (non-associations): *Broan NuTone • Platt Electric Supply • Philips • Legrand • Werner Ladder*

URL for more information about the LMS:
<http://www.bluevolt.com/lms>

Three-year pricing: *None provided by company, as the pricing model varies from client to client.*

Hosting: *By company only*





Our Take on BlueVolt Some Highlights

BlueVolt comes at its product from a business-model perspective, rather than focusing on technology per se. The company and its platform offer a well-thought out approach to serving three interrelated parties—individual learners, the association, and the association’s suppliers or other organizational members.

- For associations where suppliers build courses to be delivered to the association’s members, the suppliers are billed \$3 to \$5 per successful completion of a course, and the association only pays a one-time set up fee of \$10,000—so BlueVolt shifts the lion’s share of the costs from the association to its suppliers.
- BlueVolt describes itself as an “extended” LMS—meaning suppliers as well as the overarching association have visibility into usage, users’ performance, and other key data.
- \$BlueBucks, BlueVolt’s built-in incentive program, rewards learners for completing training. Learners earn \$BlueBucks that they can save or redeem from hundreds of merchants (Amazon.com, Sears, and hundreds more), online or off. BlueVolt says the program is proven to increase enrollments ten times.
- BlueVolt offers two or three user group conferences per year, moving the location around the country. These two-day events provide hands-on sessions that focus not only on how to educate learners but also on the business side of training and driving profit.
- BlueVolt’s LMS comes with a bridge to Adobe Connect that allows recordings to be easily repurposed for self-paced access (another sign of the gap closing between Webinar and LMS systems). BlueVolt also provides staff to help with the logistics of running Webinars.
- Mobile is a focus for the BlueVolt LMS, which makes sense given its strong presence in construction industries with contractors learning in the field. While the company estimates that probably less than 5 percent of its association clients currently make use of its mobile options, it sees this as area of growth, and it is ready.

For associations with a supplier network or with a focus on what one company representative called “training as a Trojan horse for marketing,” BlueVolt offers a well-suited solution that looks to be easy to use, even for non-tech-savvy organizations and learners.

General Company Information

1. When was the company founded?
2002
2. How many employees does the company currently have?
30
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
The BlueVolt Learning Management System delivers training across a company, its suppliers, channels, associations and customers. BlueVolt's Creative Services team develops online courses, videos and webcasts. BlueVolt's Webcasts provide a highly engaging interactive environment to showcase products and train a channel.
5. Provide the company's contact information.
*2828 SW Corbett Ave, Ste 208
Portland, OR 97201
USA
lisa.bordeaux@bluevolt.com
503-223-2583*
6. Provide the URL for the company's Web site.
http://www.bluevolt.com
7. Provide any other information or notes relevant to the "General Company Information" section.
—
6. How many organizations in total use this LMS, including associations?
1,000
7. How many end users are registered in the single largest client implementation *hosted by the company*?
14,500
8. How many end users are registered in the single largest client implementation *hosted by the client*?
Not applicable
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
240,000
10. Briefly describe the value proposition for this LMS *as it applies to associations*.
For the Co-Op, Association, Buying Group or other Member Organization, the benefit BlueVolt offers is that they are able to deliver a world-class online learning program to their members at a very low cost. The LMS allows the association to connect its supplier members directly to their distributor members, in a way that they want and are unable to do on their own. Supplier can train their sales channel and reach the individuals in those sales organizations directly. This enhances the association's position in comparison to their competitors and establishes a significant barrier to entry for any other new organization trying to gain a foothold.

General LMS Information

1. What is the name of the LMS product?
BlueVolt
2. Provide the product version described in this survey response.
v.9.29.13251.0
3. When was the first version of the LMS initially released?
1/1/2003
4. Briefly describe the upgrade cycles for the LMS.
Using an agile development process, the BlueVolt LMS is upgraded and a new release is delivered every two weeks.
5. How many *associations* use this LMS?
11
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
15%
 - 500 to 2,499 registered end users
35%
 - 2,500 to 4,999 registered end users
25%
 - 5,000 to 9,999 registered end users
20%
 - 10,000 to 24,999 registered end users
5%
 - 25,000 or more registered end users
0%

12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
-
- 1,000 or less
 - 1,001 to 5,000
 - 5,001 to 10,000
 - 10,001 to 25,000
 - 25,001 to 50,000
 - 50,001 to 100,000
 - More than 100,000
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
- Less than 100
20%
 - 101 to 200
30%
 - 201 to 500
40%
 - 501 to 1,000
10%
 - 1,001 to 5,000
0%
 - More than 5,000
0%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
- Manufacturing and distribution in the construction and building trades.*
15. Please list the company's top *association* clients.
- IMARK Group • BLUE HAWK • Sphere 1 • Evergreen Marketing Group • Affiliated Distributors*
16. Please list the company's other (non-association) top clients.
- Broan NuTone • Platt Electric Supply • Philips • Legrand • Werner Ladder*
17. Provide a URL for more information about the LMS.
- <http://www.bluevolt.com/lms>*
18. Provide any other information or notes relevant to the "General LMS Information" section.
-

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex	<i>120</i>
Typical	<i>60</i>
Simple	<i>30</i>
 2. Briefly describe the implementation process.
- The university shell is built and then custom branding is added. The customer is given admin access and receives admin training. Users and courses are added, then the university is launched.*
3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.
 - *Software engineers - create the university/ LMS*
 - *Project Manager - interfaces with customer and internal teams to implement a university.*
 - *Sales Representative - interfaces with customer and delivers training to admins*
 - *Training & Product Manager - creates and delivers training for admins*

4. Please specify the location (by time zone) of company personnel involved in implementation.
-8 and -5 UTC
5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
Sales, product, marketing or HR manager - identify training goals and audience; provide brand standards/management, users and content.
6. Provide any other information or notes relevant to the "LMS Implementation" section.
—

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
—
 - 500
 - 2,500
 - 5,000
 - 10,000
 - 25,000
 - Unlimited
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
—
 - 500
 - 2,500
 - 5,000
 - 10,000
 - 25,000
 - Unlimited
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
Not applicable
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
Not applicable
5. Briefly describe the pricing model for the LMS.
For an LMS where the Association is building and delivering the courses, the pricing is based on the number of enrollments versus the number of users, on an annual basis. Average price per enrollment is \$3.27. For Associations where suppliers are building the training to be delivered to the association's members, the supplier is billed \$3-5 per successful completion of a course. The association only pays a one-time set up fee of \$10,000.
6. Briefly describe the payment schedule.
Entirely custom. Determined by each customer.

7. Briefly describe pricing for additional services.
 - *Content Development: BlueVolt's Creative Service team can produce online courses for customers starting at \$4,000. Webcast production is \$2,550. Video production services are quoted per project.*
 - *Development/Engineering: Custom development is available and quoted per project.*
 - *Support: 24/7 end-user support is included in all contracts. Support packages are available for additional training beyond that included in an university launch. Prices range from \$1,500 for 10 hours to \$4,000 for 40 hours.*
8. Provide any other information or notes relevant to the "Pricing" section.

—

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?

Not applicable
2. Briefly describe the technical framework and code structure of the LMS.

BlueVolt use custom ASP.net web application with a SQL server database back end.
3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.

BlueVolt uses an XML-based report service (API), to import historical training records from other systems. All reports are exportable to Excel or csv. We provide single sign-on (SSO) functionality for user access and account creation.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.

The BlueVolt LMS is almost infinitely scalable as it is in the Amazon cloud (web-based, datacenter, database and servers).
5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or

technical infrastructure.

Because we use Amazon web services, we are able to scale capacity to meet our customers' needs.

6. Provide any other information or notes relevant to the "Technology" section.

—

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
 - *Internet connection.*
 - *Any browser, operating system or platform will work.*
 - *Speakers or a way to hear sound is needed for some content.*
2. What are the technical requirements for an *administrator* to access the LMS?
 - *Internet connection.*
 - *Any browser, operating system or platform will work.*
 - *Speakers or a way to hear sound is needed for some content.*
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.

Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.

Yes
5. Provide any other information or notes relevant to the "System Requirements" section.

We recommend the following for optimal viewing of courses:

 - *Windows 7 64-bit*
 - ▶ *2GB RAM*
 - ▶ *1024x768 resolution*
 - ▶ *Sound card with speakers/headphone for audio*
 - ▶ *Microsoft Internet Explorer 9, Firefox 11+, Google Chrome 18+*
 - ▶ *Adobe Flash*
 - ▶ *Pop-up blockers disabled*
 - *Mac OS X 10.6 +*

- ▶ 2GB RAM
- ▶ 1024x768 resolution
- ▶ Sound card with speakers/headphone for audio
- ▶ Safari 5.0+, Firefox 11+, Google Chrome 18+
- ▶ Adobe Flash
- ▶ Pop-up blockers disabled

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
15%
2. Briefly describe the typical types of integration for the LMS.
 - *HRIS*
 - *SSO*
 - *Performance Management*
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
We provide single-sign on integration with customer portals via XML over HTTPS. We provide data extraction via our reports service via XML over HTTPS.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
 - *Assign BlueVolt project manager*
 - *Meet with customer development team*
 - *Review requirements*
 - *Prepare statement of work*
 - *Share technical documentation*
 - *Implement*
 - *Test/QA*
 - *Launch*
5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect ✓
 - Elluminate
 - Genesys
 - GoToWebinar
 - Microsoft Live Meeting
 - ReadyTalk
 - WebEx

- Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify)
6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
 - Aptify (Aptify)
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid)
 - CRM for Members (ProTech)
 - iMIS (Advanced Systems International)
 - IRMembership (IRM Systems)
 - Members360 (Affiniscape)
 - netFORUM (Avecetra)
 - Office Manager (internet4associations)
 - Personify (TMA Resources)
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS
 - The LMS has never been integrated with an AMS. ✓
 - Other (please specify)
 7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
 - ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS. ✓
 - Other (please specify)
 8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
No

9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.

Yes. Payflow Pro.

10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.

Yes. Anything that will work with SCORM 1.2 or 2004, i.e. PowerPoint, Captivate, Articulate (Presenter, Quizmaker, Engage, Storyline), Lectora, Camtasia.

11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.

Yes. Quizmaker. Proprietary built-in quiz system.

12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.

Yes. Quizmaker. SurveyMonkey.

13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.

Yes. OpenSesame, Skillsoft, ClickSafety.

14. Provide any other information or notes relevant to the “Integration and Interoperability” section.

The two questions about Testing and Libraries really should take into account that any of these systems can and should produce SCORM packages.

Standards and Guidelines

- Does the LMS produce content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508

- The LMS does not produce content that conforms to any of these guidelines or standards. ✓
 - Other (please specify)
- Can the LMS play content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
 - Provide any other information or notes relevant to the “Standards and Guidelines” section.

—

Hosting

- Is the LMS available as a *company-hosted* solution?

Yes
- How many LMS installations are hosted by the *company*?

82
- Is the LMS available as a *client-hosted* solution?

No
- How many LMS installations are hosted by the *client*?

Not applicable
- How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner ✓
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
- If the company’s LMS hosting is provided by a partner or partners, please list the name(s).

Amazon

7. Briefly describe the company's preferred or recommended hosting option.
BlueVolt provides the hosting for all LMS implementations.
8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
The system is down for each release. This occurs between the hours of 10:00 pm to midnight, every other Wednesday. Customers are notified via email for these scheduled downtimes. We also provides real-time status and service quality metrics online at <http://status.bluevolt.com>.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing ✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the "Hosting" section.
—

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
No
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
No
6. Provide any other information or notes relevant to the "Personalization" section.
—

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
Yes. Some of the system is cascading style sheets and others are customizable in the admin section via WYSIWYG HTML editors.
2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).
No
3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.
Yes. Certain navigation items can be turned on/off via a properties editor. The end user view of course listings can be customized in a hierarchical structure with restrictions based on user type.
4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.
No

Each BlueVolt university home page is custom-branded.

The screenshot shows the Embassy University website. At the top, there is a navigation bar with 'Home', 'Course Catalog', '\$BlueBucks', 'Contact', and 'Help'. A search bar is located on the right. Below the navigation is a banner image featuring industrial equipment. The main heading reads 'Embassy University' followed by 'Welcome to Embassy University!'. A sub-heading says 'We're excited that you're here! It's simple and easy to get started. Just click on the course links below. Earn \$BlueBucks for completing courses. Redeem them by clicking the redeem button. See the "Help" button if you have any questions, we're just a click or a call away!'. Below this is a section for 'Available Courses' with three dropdown menus: 'Browse by Level of Difficulty', 'Browse by Product Type', and 'Browse by Vendor Partner Name'. A specific course is listed: 'Sloan Valve: BASYS New Faucet Platform' with a price of '2.00 \$BB | 0.25 hours'. Underneath is a 'Training Tracks' section for 'Solar' showing '0% Complete' and '10 Courses'. A 'Show All' link is visible on the right.

The screenshot shows the Sphere 1 University website. The header features the 'Sphere 1' logo with the tagline 'NATIONAL STRENGTH BACKED BY LOCAL SERVICE' and the values 'Integrity, Honesty, Respect'. The navigation bar includes 'Home', 'Course Catalog', '\$BlueBucks', 'Contact', and 'Help'. A search bar is on the right. The main banner says 'WELCOME to Sphere 1 University!' and provides instructions to browse training via featured items or the course catalog. Below the banner are links for 'New Product Information', 'Specific Installation and Application Training', 'Safety Training', and 'Sales Training'. A section for 'Additional Resources' lists 'Sphere 1: Getting Started for Distributor Members' and 'Sphere 1: Getting Started for Preferred Suppliers', each with a 'Gateway for Growth: Distributor Members Preferred Suppliers' link. A 'Sponsor Quick Links' section displays logos for BOSTITCH, Senco, KEET, LENOX, IRWIN, and HANSON. The 'Training Tracks' section for 'Solar' shows '0% Complete' and '10 Courses'. Below is an 'Enrolled' section with a 'Show All' link and a list of courses: 'Saf-T-Cart: It's Not Just a Cart, It's a Saf-T-Cart!', 'Oregon - 2011 Changes to the NEC, Part I (includes State Laws and Ru...', 'Fishtapes, Benders and Accessories (Mobile)', and 'Diagonal Cutting Pliers and Crimpers (Mobile)'. Each course entry shows its status (e.g., 'Enrolled') and details like price and duration.

University home pages in BlueVolt can contain banners and promotional messages.

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
Yes. The admin sets the available languages and business rules for language switching. End users can choose their preferred language. HTML banners and design can be customized via WYSIWYG editors. Course description pages customizable via form fields and WYSIWYG editors. Contact pages are customized via WYSIWYG editors. Course completion certificates via certificate template.
6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.
No
7. Provide any other information or notes relevant to the “Interface Configuration” section.
—
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
No
5. Can administrators change the default time zone used for formatting dates and times in the LMS?
—
6. In how many countries has the LMS been implemented for clients?
4
7. Please list the countries where the LMS has been implemented for a client.
US, China, Mexico, Canada.
8. In how many languages has the LMS been implemented for clients?
10
9. Please list the languages in which the LMS has been implemented for a client.
German, English, Spanish, French, Italian, Portuguese, Korean, Chinese, Japanese.
10. How many language packs are available for the *end-user* view of the LMS?
10

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
No
2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
No
3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
11. Please list the languages for which a language pack is available for the *end-user* view.
German, English, Spanish, French, Italian, Portuguese, Korean, Chinese (simplified), Chinese (traditional), Japanese.
12. How many language packs are available for the *administrator* view of the LMS?
10
13. Please list the languages for which a language pack is available for the *administrator* view.
German, English, Spanish, French, Italian, Portuguese, Korean, Chinese (simplified), Chinese (traditional), Japanese.
14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
—

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for other end users
 - The LMS does not support search by end users.
 - Other (please specify)
3. What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify)

4. Provide any other information or notes relevant to the “Search and Catalogs” section.
 -

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars)
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)

BLUE HAWK
university

Admin | Logout

Home Course Catalog \$BlueBucks Contact Help Search Courses

Course Catalog

Browse Vendor Partner Training Courses

Categories

Browse Training By Vendor Partner Name	43 Items	>
Browse By Course Launch Date	3 Items	>
Browse By Course Difficulty	2 Items	>
NEW Product Training	23 Items	>

Course catalogs can be categorized in BlueVolt, to make finding content easier for users.

BlueVolt category pages are customizable.

BROAN
NuTone

Admin | Logout

Home Course Catalog \$BlueBucks Contact Help Search Courses

Save time and increase profitability with the fastest, easiest, most universal installation.

ULTRA
Fastest, Easiest, Most Universal Installation

Check out the Archived Webcast on this new revolutionary ventilation technology [here](#).

Course Catalog > Product Training

ULTRA

- Broan-NuTone Webcast - Part I Introduction: A Revolution in Ventilation Fan T... **Enrolled** | 1 hour >
- Broan-NuTone Webcast - Part II Advanced: A Revolution in Ventilation Fan Technology (Arc... >
- Broan-NuTone: ULTRA: A Revolution in Ventilation Technology (Archived W... **Enrolled** | 5.00 \$88 >

Introducing ULTRA!

- The perfect solution to meet today's continuous ventilation requirements.
- Maintain CFM in nearly every installation.
- Better lighting while using less energy.
- No ventilation fan is quieter.

Home | Terms of Use | Contact | Help

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3. Does the LMS provide the ability to author learning content?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
Video upload module type that encodes the videos in an easy, no coding approach.
5. Does the LMS support offline authoring of learning content?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the LMS supports offline authoring.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Check in/check out functionality
Unavailable
 - Ability to review content before it is published
Unavailable
 - Ability to assign tasks to administrators
Unavailable
 - Ability to monitor progress on tasks
Unavailable
 - Ability to add internal comments (viewable only by other administrators) to content
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
LMS is not an authoring platform.
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
8. Can the LMS generate printer-friendly content?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
—
9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
—

PHILIPS
sense and simplicity

Lighting University North America

Admin | Logout

Home Course Catalog \$BlueBucks Contact Help Search Courses

Philips Lighting: What is One Watt Worth?

[Edit This Course](#)
[Course Enrollment](#)

Detail Outline

Students should expect to learn how to apply the definition of a kilowatt hour to a value-added lamp sale. Basic terms, calculations and "real world" exercises will help the student to learn that it's more than the simple cost of one lamp versus another.

This course contains audio.

On Schedule

50% Complete

Philips Lighting: What is One Watt Worth?

- Philips Lighting: What is One Watt Worth?**
Students should expect to learn how to apply the definition of a kilowatt hour to a value-added lamp sale. Basic terms, calculations and "real world" exercises will help the student to learn that it's more than the simple cost of one lamp versus another. You can become the expert and educate your End User on how to save money with every watt saved.
Viewed (10/12/2012) [Launch](#)
- Quiz: What is One Watt Worth?**
Quiz for Philips Lighting "What is One Watt Worth?" course.
Not taken [Launch](#)
[Unenroll](#)

Each course has a Detail page and an Outline page in BlueVolt that provide an overview of the course, percent complete and on- or behind-schedule indicators.

Werner Climbing Pro: Ladder Safety v3

CLIMBING PRO SAFETY TRAINING

LADDER SAFETY v3 WERNER

Outline Thumbnails Search

- Welcome
- Introduction
- Course Objectives
- Selection
- #1 Knowledge Check
- Care & Inspection
- Proper Handling
- #3 Knowledge Check
- Setup and Use
- Stepadders
- #5 Knowledge Check
- Extension Ladders
- #6 Knowledge Check
- Conclusion
- Summary

0:00 5:00 10:00 PLAYING 90% 100%

Courses can contain video and interactivity.

Werner Climbing Pro: Ladder Safety v3

CLIMBING PRO SAFETY TRAINING

#3 Knowledge Check Point Value: 100

Question 1 of 1

When handling a ladder, it is important to remember which of the following? Check all that apply.

- Do not drag it across the ground.
- Loosely secure your ladder in transit, allowing for some vibration.
- Do not carry an extension ladder in its extended position.
- Do not drop a ladder when loading or unloading it from a vehicle.

Score so far: 0 points out of 0 [SUBMIT](#)

0:00 5:00 10:00 PLAYING 90% 100%

10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Browser-delivered online content
 - Downloadable version
 - CD or DVD
 - HTML
 - SWF
 - PDF
 - Other (please specify) ✓
We deliver content in all the above formats, but the LMS doesn't author any.
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
We are tool agnostic. Any tool that publishes SCORM compliant content will work in the LMS.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
Our LMS has a built-in quiz and survey tool. You can upload SCORM & AICC content, video files, any file format (i.e. MS Word, PowerPoint, graphic image files, PDF, links).

In-person, Place-based Courses

- Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Completely custom
 - Personnel management (for scheduling instructors and facilitators)
Completely custom
 - Facility management (for scheduling rooms)
Completely custom
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Completely custom
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Semi-standard
 - Customizable e-mail messages and notifications to users
Semi-standard
 - Customizable e-mail messages and notifications to administrators
Standard
- Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
Yes. Customers can schedule multiple sessions with multiple presenters and set seat restrictions per session. End users can view remaining seats and registers for different sessions.
- Provide any other information or notes relevant to the “In-person, Place-based

Courses” section.

You can have a single place-based course with multiple schedules and the end users selects which to attend.

Webinars

- Does the LMS provide integrated Webinar functionality?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
Fully integrated with Adobe Connect but support other vendors that use URLs for webinar access.
- Briefly describe the company’s preferred or recommended Webinar software.
Adobe Connect.
- Provide any other information or notes relevant to the “Webinars” section.
We provided a custom-branded webinar series for several of our association customers. Included:
 - Professional on-screen host*
 - Email invitations with add to calendar feature*
 - Real-time polls, surveys and chat*
 - Script development & presentation assistance*
 - Toll-free conference line*
 - Attendance reporting*
 - Rewards for completion of online quiz*
 - Archival for on-demand viewing*

Registration

- How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓

- As the result of an e-commerce purchase
 - By self-registration with administrator approval
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
 3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
 4. Does the LMS provide self-serve password recovery help for end users?
Yes
 5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
 6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
 7. Can the fields for end user profiles be added, edited, and deleted?
Yes
 8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
 9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
No
 10. Provide any other information or notes relevant to the “Registration” section.
—

Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓

- By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes
 3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level ✓
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis
 - Other (please specify)
 4. Can enrollments occur based on end user-specific criteria?
 - The end user’s role in the system ✓
 - The end user’s score on an assessment ✓
 - The end user’s completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)
 5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes
 6. Provide any other information or notes relevant to the “Enrollment” section.

The BlueVolt LMS has Training Tracks, which allow admins to set up curriculum that is role- or function-based. End users can self-enroll or admins can enroll the user. Once enrolled in a Training Track, the end user has access to all the courses in that track. Admins can provide structure by setting prerequisites or completion date requirements.

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
Yes
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
No
3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one ✓
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
 - By the user claiming the credit
 - By the user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
 - Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)

9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines)
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No ✓
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline)
 - No ✓
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
No
14. How many clients use the LMS to manage continuing education or certification?
10
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME)
 - Continuing legal education (CLE)
 - Continuing professional education (CPE)
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university ✓
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify) ✓
Compliance and technical certifications.
16. Provide any other information or notes relevant to the "Managing Continuing Education and Certification" section.
BlueVolt offers \$BlueBucks, a built-in incentive program. Designed as a true pay-for-performance system, \$BlueBucks easily rewards users as they successfully complete training. This is especially ideal for associations as the supplier members pay for the \$BlueBucks, not the association.

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)

3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?
Yes
4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
 - Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment) ✓
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
 - Per question ✓
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option
 - Based on which distracter the end user selected
 - Per assessment ✓
 - Based on the end user's overall performance on the assessment ✓
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
Yes
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
Yes
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
 - Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
No
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
 - By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)

16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order)
 - Hotspot questions (where users must select the correct area of a graphic)
 - Drag-and-drop questions ✓
 - Other (please specify)
18. Provide any other information or notes relevant to the "Assessments" section.
-

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
No
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
No
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
No
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓

- For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row)
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields
 - Date fields
 - Time fields
 - Demographic information ✓
 - Other (please specify)
11. Provide any other information or notes relevant to the “Evaluations” section.
-

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports ✓
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses) ✓
 - Other (please specify)
5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
18
7. List and briefly describe the standard, pre-configured reports available in the LMS.
 - *University Dashboard: High level university statistics (users, courses, enrollments, etc.)*
 - *Course Dashboard: Course level statistics (enrollment, completions, users, etc.)*
 - *Group Dashboard: Group level statistics (on a given set of users)*
 - *Transcript: User-specific training records*
 - *Training Track Progress: Report on training track status and completion by use*
 - *New Users: Report of new user accounts in the system*
 - *Course Enrollment Totals: Excel data-dump that can be filtered in run on many sets of data*
 - *Grade Book: Statistics and enrollment lists on a course basis*
 - *Aggregated quiz/survey results: Data on pass/fail rates, quiz level detail, and user level detail*

Including dashboards, 18 standard reports are available in the BlueVolt LMS.

BlueVolt course level reports include a dashboard and detailed views and are e-mailable.

Course: Brian-NuTone LLC: Ultra Silent™ Humidity Sensing Fans and FanLights
Viewing course dashboard as BlueTechAdmin, Demo.

Chart: Enrollments and Completions in the Last 12 Months

Month	Enrollments	Completions
November	35	32
December	38	35
January	40	38
February	45	40
March	42	42
April	25	22
May	38	32
June	20	18
July	20	18
August	38	35
September	30	25
October	10	8

Highlights:

- Enrollments:** 1,445 of 1,550 (Includes active enrollments, any completed enrollments, or enrollments that have earned SGB)
- Completions:** 1,302
- \$BlueBucks Awarded:** \$1,360

Reports:

- Course Enrollment Report (Excel download)
- View individual user results (Transcript)
- View course rollup (Grade Book)
- Aggregated quiz/survey results

Actions:

- Enroll students
- Edit the course
- Manage schedules
- Choose another dashboard
- Email this dashboard
- Email students about this course

Enrollees:

Name	Email	Enrolled	Completed
Witchell, Anthony	ANTHONY@APEISUPPLY.COM	06/07/2011	10/11/2012
Ferris, James	jeff@stevenson.com	10/09/2012	10/09/2012
McDaniel, Vicki	vickidaniel@seccontrols.com	10/09/2012	10/09/2012
Rodriguez, Steven	steven.rodriquez@sealelectrics.com	10/05/2012	10/08/2012
Schneider, Jeff	schneider@summit.com	10/04/2012	10/05/2012
Steele, Jim	jim.steele@seccontrols.com	10/02/2012	10/02/2012
Winters, Dan	dan.winters@seccontrols.com	09/20/2012	09/20/2012

- *Completed Course Hours: # of training hours completed by users*
 - *Webcast Viewership: How many viewing locations & individual attendees watched a webcast*
 - *University Course Hierarchy: All categories and courses within the university*
 - *Course Age Report: How long since course was updated*
 - *File Download History: Historical records of files downloaded by user, with file version information*
 - *Course Payment: eCommerce report of what courses were purchased, payment, promo code usage, etc.*
 - *User \$BlueBucks: How many \$BlueBucks rewards have been earned by users*
 - *University \$BlueBucks: How many \$BlueBucks rewards has your university paid out to its users*
 - *University Promo History: eCommerce report of what discount promo codes were used & by which end user*
 - *University Group Hierarchy: Report of group hierarchy structure for organizing end users*
8. Briefly describe the process for creating ad-hoc reports in the LMS.
Admin chooses from drop-downs which data they want included/excluded and then export to Excel.
9. How many custom reports does the company typically develop for a client implementation of the LMS?
0
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
Custom filtering, sorting & pivoting of training data for analytic purposes - such as top/bottom performing groups, courses, and/or quizzes.
11. Provide any other information or notes relevant to the "Reporting" section.
—

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not).
 - Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts).
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish).
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports.
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
5
3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
4
4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.
—

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Unavailable
 - End user-to-administrator e-mail
Unavailable
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Unavailable
 - Live chats (for multiple end users)
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Unavailable
 - Ability for end users to create and store notes or comments on learning content for their own use
Unavailable
 - Discussion boards
Unavailable
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Unavailable
 - Live voice-over-IP
Unavailable
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
4. Provide any other information or notes relevant to the "Collaboration and Communication" section.
—

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard

- Handles transactions for other online items (e.g., PDF study guides)
Semi-standard
 - Handles transactions for physical items (e.g., books or CDs)
Unavailable
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Unavailable
 - Handles payment by invoice (manual intervention needed)
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles sales tax, including variations based on the state or region
Completely custom
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Unavailable
 - Customizable e-mail message to users making the purchase
Semi-standard
 - Automatic e-mail message on purchase to administrators
Semi-standard
 - Customizable e-mail message to administrators
Semi-standard
 3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Automatically maintains order status that can be checked by end user
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
 4. Which payment gateways are supported by the e-commerce system?
 - 2Checkout
 - Authorize.Net
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments

- Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify)
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
The customer establishes a Payflow account and provides their merchant ID to us, which we then connect to the LMS to process their transactions. Or, customers will use our account and we collect the money for them and then reimburse them via ACH or a credit to their account with us.
7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
Yes
8. Provide any other information or notes relevant to the "E-commerce" section.
—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Standard
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Standard
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Semi-standard
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Standard
 - Scheduled in-person training at client offices for administrators
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Monday - Friday 8 am to 5 pm PT, excluding holidays.
 4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Monday - Friday 8 am to 8 pm ET, excluding holidays.
 5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Monday - Friday 8 am to 5 pm PT, excluding holidays. Responses are within 24 business hours.
 6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Monday - Friday 8 am to 8 pm ET, excluding holidays.
 7. Briefly describe the company's typical ongoing communication with its LMS clients.
Quarterly and annual review by account manager. Bi-monthly emails with training/webcast information. Bi-monthly email with release updates. Bi-annual customer satisfaction survey.
 8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
BlueVolt doesn't contact our customers' end users, unless they ask us to.
 9. Provide any other information or notes relevant to the "Support and Training" section.
—
- The company does not allow the LMS code to be modified.
 - Other (please specify)
 2. What approximate percentage of your client implementations to date have involved custom programming work?
5%
 3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
We've created custom reports, integrated with HRIS, custom portal/front-side integration, and custom LMS features like scheduled courses.
 4. Briefly describe the process for used for planning and implementing custom programming work.
 - *Assign project manager*
 - *Kickoff project*
 - *Gather requirements*
 - *Develop/engineer*
 - *Acceptance testing/QA*
 - *Launch*
 5. Please specify the location (by time zone) of personnel involved in custom programming.
-8 and -5 UTC
 6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - Other (please specify)
 7. Please specify the location (by time zone) of personnel involved in custom content development.
-8 UTC
 8. Provide any other information or notes relevant to the "Custom Programming and Content Development" section.
BlueVolt has a Creative Services team staffed by instructional designers, writers, graphic artists and project managers. The BlueVolt team will work closely with customers who need help developing content throughout the development process from storyboard through final deliverable.

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No

MemberSight Community CommPartners

LMS Version: 1.1

Value proposition: *MemberSight Community is one of the first, true social learning platforms. It combines a private social CRM with an LMS to provide organizations a collaborative learning environment, MemberSight Community. For SCORM compliant applications CommPartners has a close partnership with Digital Ignite and provides the Crowd Wisdom Platform under the name MemberSight LMS. MemberSight is supplementing CommPartners Learning Content Platform (LCP) which was our initial LCMS . There are over 400 installation of the LCP in existence.*

Top clients (associations): *National Association of Home Builders • Society of Actuaries • American Medical Association • American College of Surgeons • American College of Cardiology • Americans for the Arts • American Immigration Lawyers Association • National Association of Social Workers • Association of Corporate Council • American Nurses Association*

Top clients (non-associations): *University of Michigan • VISA • National Quality Forum • Elon University*

URL for more information about the LMS:
<http://www.commpartners.com/learning-platforms/membersight-community>

Three-year pricing: \$9,000 to \$34,000

Hosting: *By company only*

CommPartners

7230 Lee Deforest Drive, Suite 206
Columbia, MD 21046

800.274.9390

rfinstein@commpartners.com

<http://www.commpartners.com>



CommPartners



Our Take on MemberSight Community Some Highlights

While MemberSight Community is new (first released in July of 2012), CommPartners has been in business since 1994, and the platform benefits from the company's long experience serving the association sector.

- The platform grew out of a need CommPartners saw—traditional LMSes weren't social enough, and social customer relationship management (CRM) systems often floundered because they didn't have substantive content to seed interaction. MemberSight Community aims to fill that gap by combining a private CRM with LMS functionality to provide a truly collaborative learning environment.
- As you might expect of a system with an emphasis on social, learners can easily customize their personal dashboard by moving widgets (My Calendar, My Enrollments, My Discussions, Recommended Discussions, and more).
- The platform provides community updates, so users see, for example, who has signed up for a particular learning opportunity, which can encourage them to sign up themselves.
- The interface for Webinar access allows participants and facilitators to meet in advance and can be readily used for facilitating blended learning or multi-week courses, providing tabs for different modules.
- The platform is fully integrated with EventCenter and Click2Present, CommPartners' Webinar and Web meeting systems.
- CommPartners Learning Content Platform has been integrated with seven association management systems, and the company brings that integration experience to the table with MemberSight Community.
- It should be noted that if associations are focused primarily on SCORM-compliant content and want a more fully featured "traditional" LMS (rather than a system that emphasizes social and collaborative learning), CommPartners recommends its MemberSight LMS product.

CommPartners sees MemberSight Community working particularly well for associations that have a community that's stagnating—because adding learning content can raise adoption and activity; for associations whose learning is asocial and would benefit from learner interaction; and for associations that want to draw in participants for a live event and extend its reach online.

General Company Information

- When was the company founded?
1994
- How many employees does the company currently have?
38
- Is the company privately or publicly held?
Private
- Briefly describe the top three products or services the company offers.
Webinar / Webcast Production
Hybrid Events
Learning Platforms
- Provide the company's contact information.
7230 Lee Deforest Drive
Suite 206
Columbia, MD 21046
USA
rfinstein@commpartners.com
443-539-4840
- Provide the URL for the company's Web site.
<http://www.commpartners.com>
- Provide any other information or notes relevant to the "General Company Information" section.
CommPartners works with over 1,300 associations. Our organization provides a three tiered strategy that includes consulting, platforms and services. Our experience in providing online education solutions to a wide variety of organizations has helped us to evolve our extensive range of offerings.
- When was the first version of the LMS initially released?
7/1/2012
- Briefly describe the upgrade cycles for the LMS.
Every 6 months
- How many *associations* use this LMS?
2
- How many organizations in total use this LMS, including associations?
2
- How many end users are registered in the single largest client implementation *hosted by the company*?
2,000

General LMS Information

- What is the name of the LMS product?
MemberSight Community
- Provide the product version described in this survey response.
1.1



Chris Urena, vice president of business development at CommPartners

An end user's view of the MemberSight Community home page

8. How many end users are registered in the single largest client implementation *hosted by the client*?
Not applicable
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
2,100
10. Briefly describe the value proposition for this LMS *as it applies to associations*.
MemberSight Community was just recently introduced. It is one of the first, true social learning platforms. It combines a private social CRM with an LMS to provide organizations a collaborative learning environment, MemberSight Community. For SCORM compliant applications CommPartners has a close partnership with Digital Ignite and provides the Crowd Wisdom Platform under the name MemberSight LMS. MemberSight is supplementing CommPartners Learning Content Platform (LCP) which was our
- initial LCMS . There are over 400 installation of the LCP in existence.*
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
50%
 - 500 to 2,499 registered end users
50%
 - 2,500 to 4,999 registered end users
0%
 - 5,000 to 9,999 registered end users
0%
 - 10,000 to 24,999 registered end users
0%
 - 25,000 or more registered end users
0%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?

- 1,000 or less
0%
 - 1,001 to 5,000
50%
 - 5,001 to 10,000
0%
 - 10,001 to 25,000
50%
 - 25,001 to 50,000
0%
 - 50,001 to 100,000
0%
 - More than 100,000
0%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
- Less than 100
0%
 - 101 to 200
0%
 - 201 to 500
50%
 - 501 to 1,000
50%
 - 1,001 to 5,000
0%
 - More than 5,000
0%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
MemberSight is appropriate for all professional and trade associations.
15. Please list the company's top *association* clients.
National Association of Home Builders • Society of Actuaries • American Medical Association • American College of Surgeons • American College of Cardiology • Americans for the Arts • American Immigration Lawyers Association • National Association of Social Workers • Association of Corporate Council • American Nurses Association
16. Please list the company's other (non-association) top clients.
University of Michigan • VISA • National Quality Forum • Elon University
17. Provide a URL for more information about the LMS.
<http://www.commpartners.com/learningplatforms>,, <http://www.commpartners.com/learning-platforms/membersight-community>, <http://www.commpartners.com/learning-platforms/membersight-lms>
18. Provide any other information or notes relevant to the "General LMS Information" section.
CommPartners has over 400 implementations for our Learning Content Platform. This platform was originally created to support our online event clients. This platform will continue to be available.

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)
- Complex
120
- Typical
60
- Simple
30
2. Briefly describe the implementation process.
We provide a five steps implementation process which includes the following:

1. *Understand business parameters for member enrollments, content creation and access, registration and credentialing.*
2. *Determine integration parameters we will be supporting including AMS, CMS, e-commerce and social networks.*
3. *Have discussions with our consultants to determine initial launch and ongoing community development strategy.*
4. *Discuss and implement appropriate LMS configuration and feature set along with content migration.*
5. *Provide orientation / training to client staff.*
3. Briefly describe the *company* personnel (by role) involved in the LMS implementation. *CommPartners has four primary contacts involved in implementation.*
 1. *Case Manager: Responsible for project management, continuity of resources, client communication.*
 2. *Lead Installer: Responsible for LMS License creation, programming and setup.*
 3. *Consultant: Responsible for LMS Strategy and planning.*
 4. *Trainer - Responsible for orienting client to the learning platform.*
4. Please specify the location (by time zone) of company personnel involved in implementation. *-5 UTC*
5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
 - *Project lead in the education department: We would work with this person for development and placement of content, credentialing, pricing, learning strategies and taxonomy.*
 - *IT Assigned Staff Member: We work with this contact for all integration points.*
 - *Membership / Marketing, Community and Events Dept. Staff. We work with these contacts as appropriate.*
6. Provide any other information or notes relevant to the "LMS Implementation" section. *MemberSight Community combines a social*

CRM with a LMS. In some cases we will be replacing a basic social CRM. We will need to include the migration of a social community as part of the implementation process.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$4,400
 - 2,500
\$6,600
 - 5,000
\$9,000
 - 10,000
\$10,000
 - 25,000
\$17,000
 - Unlimited
\$20,000
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

- 500
\$9,000
 - 2,500
\$13,000
 - 5,000
\$16,000
 - 10,000
\$19,000
 - 25,000
\$27,000
 - Unlimited
\$34,000
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
Not applicable
 4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
Not applicable
 5. Briefly describe the pricing model for the LMS.
There are initial setup and ongoing licensing fees. Initial setup varies depending on requirements for integration with client processes. Hosting varies depending on number of registered users.
 6. Briefly describe the payment schedule.
Initial down payment is required to be applied to one time setup fees. Balance of setup fees are due net/30 days after completion. Hosting fees are invoiced monthly.
 7. Briefly describe pricing for additional services.

Client support and upgrades are included in the client's licensing fees. There are additional fees for any custom setup options, initial and ongoing consulting.

8. Provide any other information or notes relevant to the "Pricing" section.

If a client is using CommPartners' online event services, discounts can be applied depending on volume of services contracted for.

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Not applicable
2. Briefly describe the technical framework and code structure of the LMS.
MemberSight is a PHP application with a MySQL database back end.
3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.
MemberSight has the ability to integrate with most popular AMS solutions for the purpose of single sign on and the passing of credentials and other information back to the database. It has a utility for mass import of client's data, approved resources and access.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
MemberSight is a SAAS based product that was built to scale not only at the software level but by adding hardware as well.
5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
Hosting Fees include (each environment):
 - 500GB/month bandwidth
 - 100GB/month file storage
6. Provide any other information or notes relevant to the "Technology" section.
—

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
MemberSight is accessible across all operating systems and can be used with all popular browsers.
2. What are the technical requirements for an *administrator* to access the LMS?
MemberSight is accessible across all operating system and using all popular browser for administrators.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the “System Requirements” section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
80%
2. Briefly describe the typical types of integration for the LMS.
AMS Integration for supporting single sign-on, and passing through credentialing information and learning history. Single sign on with private communities, e-commerce sites, registration sites.
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
Simple Object Access Protocol and Extensible Markup Language (XML).
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
 1. *Determine data exchange needs, frequency, timing and use*

2. *Determine system protocols needed to communicate*
 3. *Establish estimate and budget*
 4. *Create project plan*
 5. *Execute plan*
5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect
 - Elluminate
 - Genesys
 - GoToWebinar
 - Microsoft Live Meeting
 - ReadyTalk
 - WebEx
 - Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify)
CommPartners provides its own webinar platforms.
 6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
 - Aptify (Aptify) ✓
 - Association Anywhere (ACGI) ✓
 - ClearVantage (Euclid) ✓
 - CRM for Members (ProTech) ✓
 - iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap)
 - netFORUM (Avecetra) ✓
 - Office Manager (internet4associations)
 - Personify (TMA Resources) ✓
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS
 - The LMS has never been integrated with an AMS.
 - Other (please specify) ✓
CommPartners provides a standalone learning content management platform that has been integrated with 7 different AMS's.

MemberSight is the product of integrating LCMS with the best functions of a social CRM. Therefore, MemberSight can be integrated with just about any AMS.

7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
-
- ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS.
 - Other (please specify)
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
- Yes. CommPartners LCP (LCMS).*
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
- Yes. Authorize.net and Proprietary.*
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
- Yes. Proprietary. Authgen.*
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
- Yes. We have our own assessment /certificate component.*
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools,

whether third-party or proprietary? If yes, please specify which evaluation tools.

Yes. We use our own survey tools.

13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
- Yes. We have our own proprietary libraries.*
14. Provide any other information or notes relevant to the “Integration and Interoperability” section.
-

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?
- AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards. ✓
 - Other (please specify)
2. Can the LMS play content that conforms to guidelines or standards?
- AICC ✓
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
3. Provide any other information or notes relevant to the “Standards and Guidelines” section.
-

Hosting

1. Is the LMS available as a *company-hosted* solution?
Yes
2. How many LMS installations are hosted by the *company*?
2
3. Is the LMS available as a *client-hosted* solution?
No
4. How many LMS installations are hosted by the *client*?
Not applicable
5. How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner ✓
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
6. If the company's LMS hosting is provided by a partner or partners, please list the name(s).
Avectra, Digital Ignite, DataPipe.
7. Briefly describe the company's preferred or recommended hosting option.
Company Hosted.
8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
Routine maintenance is scheduled quarterly during off hours.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing
 - Yes, when requested for an additional fee ✓
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the "Hosting" section.

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
Yes
6. Provide any other information or notes relevant to the "Personalization" section.
MemberSight Community provides a relevancy engine that recommends learning content, discussions and resources based on the participants information or preferences.

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
Yes. Client can implement their own style sheets, colors, headers, footers, and customize their dashboards.

2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).

Yes. Same as a user.

3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.

Yes. Users can customize their home screen.

4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.

Yes. —

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.

Yes. Users can opt in to certain content based on preference selections.

6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.

Yes. Administrators can opt in to certain content based on preference selections.

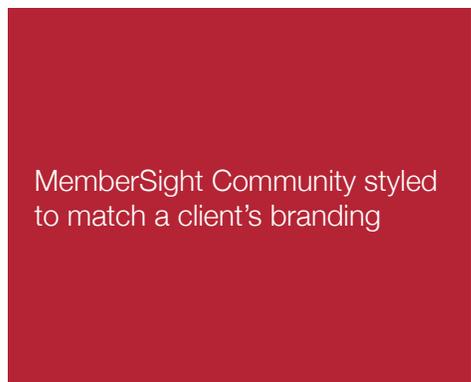
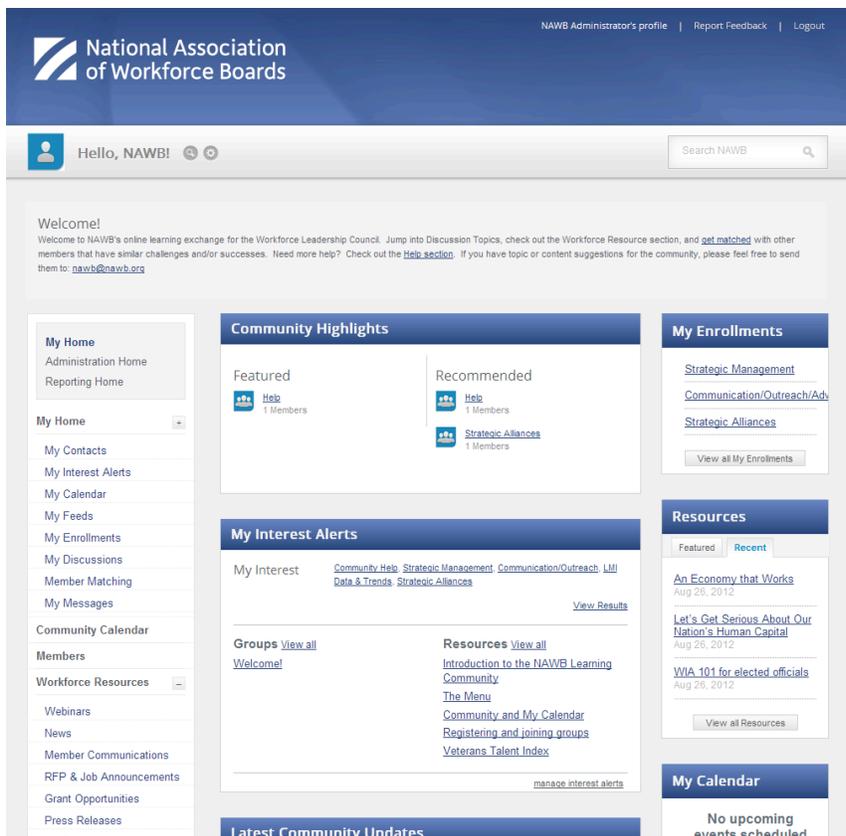
7. Provide any other information or notes relevant to the “Interface Configuration” section.

—

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

Yes



2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

Yes

3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?

Yes

4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?

No

5. Can administrators change the default time zone used for formatting dates and times in the LMS?

Yes

6. In how many countries has the LMS been implemented for clients?

1

7. Please list the countries where the LMS has been implemented for a client.

U.S.A.

8. In how many languages has the LMS been implemented for clients?

1

9. Please list the languages in which the LMS has been implemented for a client.

English.

10. How many language packs are available for the *end-user* view of the LMS?

0

11. Please list the languages for which a language pack is available for the *end-user* view.

The language file uses a .PO format. The language file can be translated word-for-word as needed into almost any left-right language.

12. How many language packs are available for the *administrator* view of the LMS?

0

13. Please list the languages for which a language pack is available for the *administrator* view.

The language file uses a .PO format. The language file can be translated word-for-word as needed into almost any left-right language.

14. Provide any other information or notes relevant to the “Internationalization and Localization” section.

—

Search and Catalogs

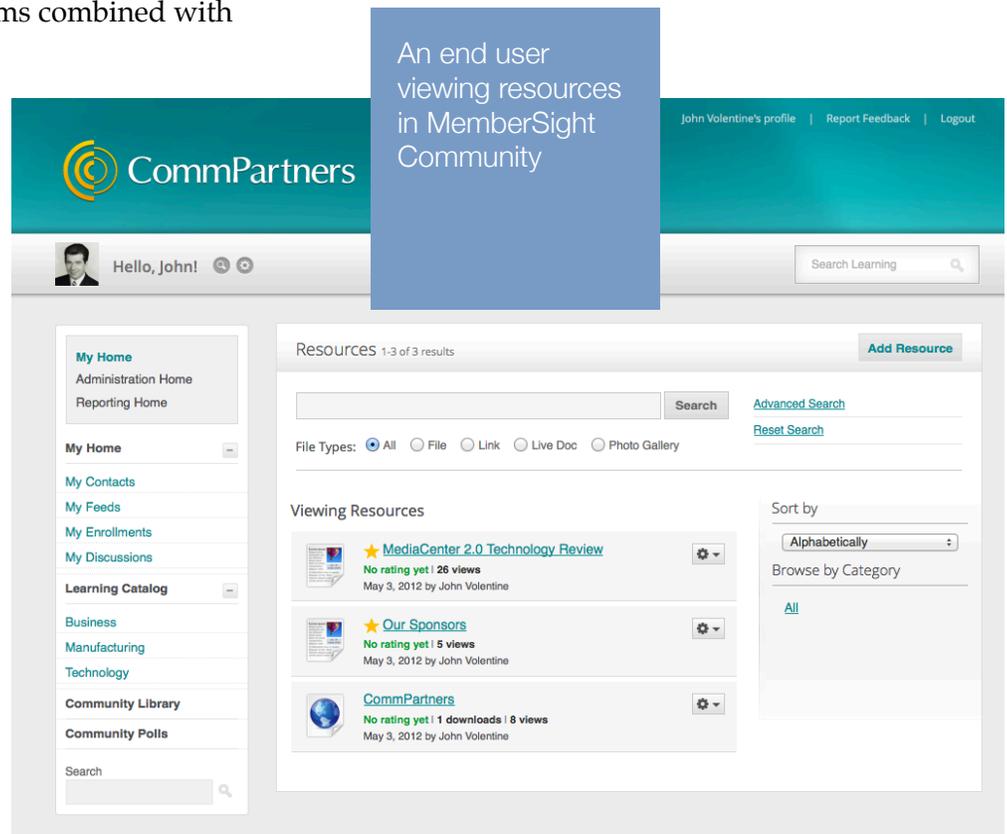
- How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
- What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users ✓
 - The LMS does not support search by end users.
 - Other (please specify)
- What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓

- Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify)
4. Provide any other information or notes relevant to the “Search and Catalogs” section.

- courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
- The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)
3. Does the LMS provide the ability to author learning content?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
- Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education ✓
 - Third-party “off-the-shelf”



- If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
MemberSight offers a content creation wizard with the ability to author pre-recorded audio and or video on-demand or live lectures. It also offers the ability to load pre-created documents, videos, or other course materials as needed.
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
MemberSight offers a content creation wizard with the ability to author pre-recorded audio and or video on-demand or live lectures. It also offers the ability to load pre-created documents, videos, or other course materials as needed.
 5. Does the LMS support offline authoring of learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
MemberSight provides the ability to load any content that has been created offline.
 6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Check in/check out functionality
Standard
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Standard
 - Ability to monitor progress on tasks
Standard
 - Ability to add internal comments (viewable only by other administrators) to content
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 8. Can the LMS generate printer-friendly content?
 - Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
 9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
—

10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Browser-delivered online content ✓
 - Downloadable version
 - CD or DVD ✓
 - HTML
 - SWF ✓
 - PDF ✓
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
CommPartners has its own set of presentation / course authoring tools called MediaCenter and EventCenter.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
-

In-person, Place-based Courses

- Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Administrative calendar for courses
Third-party
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Third-party
 - Personnel management (for scheduling instructors and facilitators)
Third-party
 - Facility management (for scheduling rooms)
Third-party
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Third-party
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Standard
- Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
No
- Provide any other information or notes relevant to the “In-person, Place-based Courses” section.
—

Webinars

- Does the LMS provide integrated Webinar functionality?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
We have our own integrated webinar platform that fully integrates with our LMS products including MemberSight Community.
- Briefly describe the company’s preferred or recommended Webinar software.
CommPartners webinar platforms.
- Provide any other information or notes relevant to the “Webinars” section.
CommPartners EventCenter was developed for online events with a long list of features ideal for formal live and pre recorded online programs.

Registration

- How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓
 - By an administrator registering end users one by one
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify)
- Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
- Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes

4. Does the LMS provide self-serve password recovery help for end users?
Yes
 5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
 6. Can administrators define new *administrator* roles with distinct rights and access in the site?
—
 7. Can the fields for end user profiles be added, edited, and deleted?
—
 8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
 9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
Yes
 10. Provide any other information or notes relevant to the “Registration” section.
—
3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level ✓
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis ✓
 - Other (please specify)
 4. Can enrollments occur based on end user-specific criteria?
 - The end user’s role in the system ✓
 - The end user’s score on an assessment
 - The end user’s completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)
 5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes
 6. Provide any other information or notes relevant to the “Enrollment” section.
—

Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
Yes
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user’s state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
No

3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
 - By the user claiming the credit
 - By the user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify) ✓
Any content such as a linked article, uploaded document, video, etc can be added to a course with an assessment or certificate attached upon completion.
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
 - Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines)
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No ✓
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
—
 - Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)

- Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline)
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS’s portfolio functionality.
Yes. MemberSight Community supports users maintaining a portfolio of their enrollments by unique types of learning content / CEUs.
14. How many clients use the LMS to manage continuing education or certification?
2
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE)
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify)

16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.
—

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
- Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course
 - Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another may only require users to achieve a 70% to pass)?
Yes
4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
- Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment) ✓
 - No
 - Other (please specify) ✓
MemberSight can provide many display options. However, once a display option has been selected it will be applied to all quizzes.
5. How does the LMS provide for automatic feedback for assessments?
- Per question ✓

- Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option
 - Based on which distracter the end user selected
 - Per assessment ✓
 - Based on the end user's overall performance on the assessment ✓
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
No
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
No
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
No
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
No
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment)
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?

- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers)
 - True/false or yes/no questions ✓
 - Text field
 - Fill-in-the-blank questions (where users type answers in fields in the questions)
 - Matching questions
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order)
 - Hotspot questions (where users must select the correct area of a graphic)
 - Drag-and-drop questions
 - Other (please specify)
18. Provide any other information or notes relevant to the “Assessments” section.
MemberSight Community’s assessment features supports most popular requirements however for more advanced requirements we recommend MemberSight LMS.

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course
 - Ability to associate multiple evaluations with a single online course
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
Yes
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row) ✓
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales)
 - Text box (single field)
 - Text boxes (multiple fields) ✓
 - Number fields
 - Date fields
 - Time fields
 - Demographic information
 - Other (please specify)

11. Provide any other information or notes relevant to the “Evaluations” section.

—

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?

No

2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?

Yes

3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?

No

4. How does the LMS provide reports?

- Provides a set of standard, pre-configured reports ✓
- Provides a built-in tool for creating ad-hoc reports ✓
- Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
- Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users’ profiles or store additional metadata on courses) ✓
- Other (please specify)

5. How are the LMS reports made available?

- View report data online in browser ✓
- Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
- Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
- Other (please specify)

6. How many standard, pre-configured reports are available in the LMS?

10

7. List and briefly describe the standard, pre-configured reports available in the LMS.

Reports are available for course or group participation, purchase /sign-ups, attendance, assessments, certificates.

8. Briefly describe the process for creating ad-hoc reports in the LMS.

Admin. can perform queries for date range, for a long list of program attributes and participant data using check boxes to determine final report components.

9. How many custom reports does the company typically develop for a client implementation of the LMS?

0

10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.

Not applicable

11. Provide any other information or notes relevant to the “Reporting” section.

—

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client’s different chapters, departments, or programs) from a single implementation?

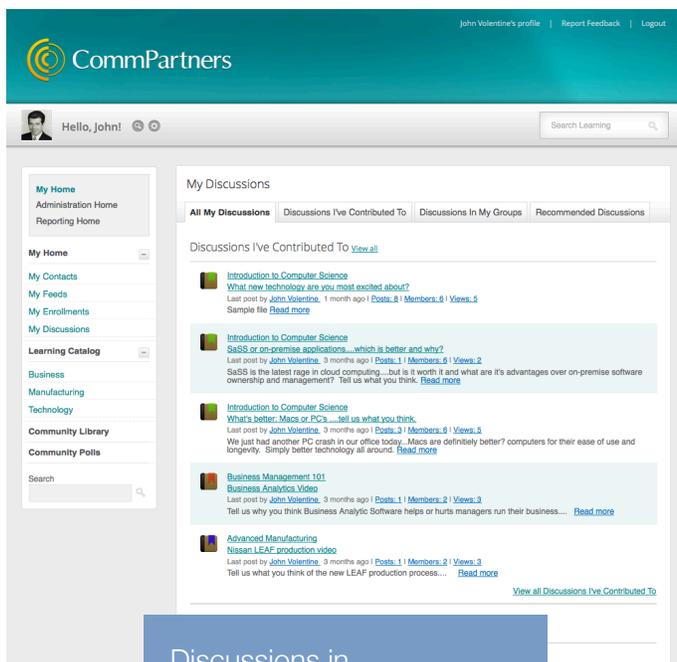
- The LMS does not provide for multiple sites from a single client implementation. ✓
- Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site).
- Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not).
- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts).

- Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish).
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site).
 - Each site in a single client implementation can have its own set of customized reports.
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
Not applicable
 3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
Not applicable
 4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.
—

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Standard
 - End user-to-administrator e-mail
Standard
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Standard
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Live chats (for multiple end users)
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Ability to organize end users in groups for collaborative work
Standard
4. Ability for end users to create and store notes or comments on learning content for their own use
Standard
5. Discussion boards
Standard
6. Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard
7. Live voice-over-IP
Standard
8. Virtual whiteboard
Unavailable
9. Virtual presentations (e.g., PowerPoint-driven)
Standard
10. Screencasting
Standard
11. Application-sharing
Standard
12. Ability to associate a wiki with a course
Standard
13. Single-point Web camera capability
Standard
14. Multiple-point Web camera capability
Standard
15. Networking (e.g., ability for end users to connect with one another)
Standard

- Ability for each registered end user to have a blog
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
MemberSight Community’s framework is based on social collaboration around content. There are multiple opportunities to connect with others through learning groups or forums.



Discussions in
MemberSight Community

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Standard
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles sales tax, including variations based on the state or region
Third-party
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Semi-standard

- Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Standard
 - Automatically maintains order status that can be checked by end user
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
 - Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net ✓
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify)
We can integrate a client's payment gateway. Authorize.Net is included.
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
Authorize.Net is our preferred system.
7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
Yes
8. Provide any other information or notes relevant to the "E-commerce" section.
—
- ## Support and Training
1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Completely custom
 - Live telephone support for administrators
Standard

- E-mail support for end users
Standard
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Unavailable
 - Self-serve, searchable knowledge base for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
We will be setting up an admin knowledge base shortly.
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Standard
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Completely custom
 - Scheduled in-person training at client offices for administrators
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Completely custom
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Monday through Friday, 8:30 am to 5:30 pm.
4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Monday through Friday, 8:30 am to 5:30 pm.
5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Monday through Friday, 8:30 am to 5:30 pm.
6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Monday through Friday, 8:30 am to 5:30 pm.
7. Briefly describe the company's typical ongoing communication with its LMS clients.
We will communicate through a community that we are setting up for LMS clients.
8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
The dedicated LMS client community will be established by the end of 2012.
9. Provide any other information or notes relevant to the "Support and Training" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
30%

3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
Assessment requests, payment packages, group rights and permissions.
4. Briefly describe the process for used for planning and implementing custom programming work.
We create an internal case and assign a case manager to oversee the development process. We provide regular updates continue to have the client review status check as we move through the different phases of development.
5. Please specify the location (by time zone) of personnel involved in custom programming.
-5 UTC
6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.
-5 UTC
8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.
—

Crowd Wisdom Digital Ignite



Industry focus: health care and finance

LMS Version: Eureka 7.1

Value proposition: *Our key value proposition: Crowd Wisdom™ was designed to help professional education address many of the challenges encountered in delivering global education programs. Our roadmap and strategy are defined by a five key pillars that drive our technology's value proposition. 1) Personalize: the learner's experience to present relevant content to the right person, while also presenting key opportunities for them to see what their "peers" or similar people of similar background are viewing/enrolling into/ completing. 2) Enable a Sense of Community: Allow the learners to contribute and share through social features that build community and peer networks- sharing informal (yet highly valuable) knowledge. This leverages the trust and loyalty that are inherent to the association to incubate and serve as a platform for dialogue by its membership and constituents. 3) Develop Careers: provide tools to effectively manage Professional Education, Continuing Education, and career tracks/specializations. 4) Engage the Learner: make the experience appealing and offer the aesthetics of popular websites. 5) Provide a solution through the career of a member/constituent: A lifecycle approach to learner engagement, our approach is to provide a "lifecycle" platform that the member, constituent, or credential holder can visit throughout their experience with an association or credential body, with each point providing personalized learning material.*

Top clients (associations): *American College of Radiology • American Speech-Language-Hearing Association • American Society of Radiologic Technologists • Institute of Management Accountants • American Optometrist Association • Healthcare Financial Management Association • American Marketing Association • American Occupational Therapy Association • American Orthopaedic Society of Sports Medicine • Chartered Financial Analyst (CFA) Institute • Institute of Financial Operations (IFO) • American Society of Civil Engineers • Colorado CPA Society*

Top clients (non-associations): *McGraw-Hill Professional • JD Powers and Associates • Corporate Executive Board • University of Colorado • Northwestern Memorial Hospital • Akamai*

URL for more information about the LMS:
<http://www.digitalignite.com>

Three-year pricing: \$26,000 to \$395,000

Hosting: *By company only*

Digital Ignite

101 West 22nd Street
Suite 104
Lombard, IL 60148

703.439.1545

info@digitalignite.com

<http://www.digitalignite.com>



digital ignite

Our Take on Crowd Wisdom

Some Highlights

Digital Ignite president Tamer Ali describes associations as the guardians of their professions and sees his company's Crowd Wisdom platform as a tool for managing the lifecycle of those professions. Agnostic about what it serves up—formal courses, PDFs, conversations, anything that can be harvested—Crowd Wisdom catalogs and organizes content for professionals.

Built by veterans in the field of e-learning (Tamer and chief technology officer John Sun both worked at VCampus), the platform is modern-looking, widgetized, and full-featured, focusing on personalization and social networking along with more fundamental LMS features.

- Crowd Wisdom provides for assessments through its Himalaya test engine and for evaluations through its Consensus poll and survey engine.
- The platform offers an array of community tools: a widget for displaying the most popular learning content, community Q&A, connect-to-peers functionality, a recommendation engine, and discussion boards, among others.
- Crowd Wisdom was designed with professional development and continuing education in mind, and Digital Ignite has experience managing credits and products of essentially any type.

Four major optional modules of the Crowd Wisdom system carry a separate price tag (due to the need to customize each to clients' specific business rules) but offer valuable functionality that may well warrant the additional costs:

- Warm Seat manages and tracks live and hybrid event attendance. The association list events and their respective sessions, and learners can then report their attendance by, for example, pledging they were present in the session. Each session can be tied its own evaluation, and certificates can be downloaded or e-mailed to learners. Digital Ignite built the Warm Seat interface for smaller displays because it knows many learners will want to access it with their mobile devices while they're on site at the event.
- The Institutional/Group Sales module supports clients with institutional members or selling to other organizations or groups that need to manage their own learners.
- The Candidate Workflow module allows associations to track candidates with a custom form entry that captures user information, an approval workflow, and payment for the application. Further logic supports tracking the candidate through levels of mastery in an educational program. Down the road, Digital Ignite sees potential for this module to be used in other situations such as performance improvement initiatives.
- A feature likely to appeal to those working in the allied health fields, the Portfolio module allows users to log activities and work responsibilities (surgeries, or other career events)—which can be flagged for validation by a supervisor—and generally track their career performance.

Although it can work for learning communities of any size, Crowd Wisdom may be particularly appropriate for larger, more active communities with lots of content, where users engaging with one another and the content and where administrators managing the experience can reap the full benefit of the automated and social networking features.



General Company Information

1. When was the company founded?
2005
2. How many employees does the company currently have?
15
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
Crowd Wisdom platform is a social, personalized learning platform that combines LMS capabilities with community and informal learning management to provide a comprehensive portal for member and constituent engagement. Multiple communities like member, non-member, institutional, and public can be supported under one instance, while functionality supports delivering personalized recommendations and powerful search to allow the learner to find or be presented with the relevant content. Himalaya Testing Engine is the Digital Ignite testing and assessment platform. It provides a scalable platform to conduct testing, exam prep, quizzing, and web-based assessment with various question types and control settings (randomization, pooling, test sections, benchmarking scores). Consensus is the Survey and Poll engine that allows clients to capture evaluations and poll results and assess user feedback.
5. Provide the company's contact information.
*101 W 22nd Street, Suite 104
Lombard, IL 60148
USA
info@digitalignite.com
+1 (703) 439-1545*
6. Provide the URL for the company's Web site.
http://www.digitalignite.com
7. Provide any other information or notes relevant to the "General Company Information" section.
DI is the "engine" behind many leading professional education and association learning programs. The product suite is exclusively focused on "mission critical" learning for organizations that have a key need to deploy

scalable, reliable, and engaging learning technology. Our client list includes leading names in healthcare, financial, scientific, trade, and other professional organizations and communities of interest. Our goal is to help clients maintain the role as the leading education source for their profession by offering a platform to serve as "central hub" to manage, deliver, and track education resources. We are a learning and knowledge management team that has focused on education technologies and knowledge management for over 15 years. In addition, we have deep experience deploying commercial and large-scale applications for use in highly visible, business critical learning programs and Association Management System (AMS) initiatives. The Digital Ignite team represents over 50 years combined experience in the learning space, with a track record of successful performance in large enterprise and international releases of learning programs for such prestigious member-based and professional organizations as the American Speech-Language-Hearing Association, The American Occupational Therapy Association, The American College of Radiology, CFA Institute, Institute of Management Accountants, the American Society of Radiologic Technologists, Healthcare Financial Management Association, American Optometrists Association, and several other groups. From small to large organizations, our common goal throughout all implementations remains the same: to align the learning platform implementation with the overall strategy to engage constituents and build valuable interactions with the learning audience through high quality learning functionality.

General LMS Information

1. What is the name of the LMS product?
Crowd Wisdom
2. Provide the product version described in this survey response.
Eureka 7.1
3. When was the first version of the LMS initially released?
01/04/2006

Various widgets can be displayed the learners after log-in, including a quick access search bar, messages from both peers instructors, recent activities, recommended courses, upcoming events, "most subscribed" courses, and a quick view of current community chat activities.

4. Briefly describe the upgrade cycles for the LMS.

Crowd Wisdom is a 100% web-based Software-as-a-Service (SaaS) and as such is continuously monitored and supported. Throughout this process, upgrades are available for all clients. Major upgrades occur on a quarterly basis (approximately every 3 months) with incremental enhancements scheduled on a monthly basis. This is a significant advantage to Software-as-a-Service in that features are constantly being released, however, it is choice of each client if the new features are enabled/disabled on their learning portal.

5. How many associations use this LMS?

45

6. How many organizations in total use this LMS, including associations?

56

7. How many end users are registered in the single largest client implementation hosted by the company?

95,000

8. How many end users are registered in the single largest client implementation hosted by the client?

Not applicable

9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?

—

10. Briefly describe the value proposition for this LMS as it applies to associations.

Our key value proposition: Crowd Wisdom™ was designed to help professional education address many of the challenges encountered in delivering global education programs. Our roadmap and strategy are defined by a five key pillars that drive our technology's value proposition.

1) Personalize: the learner's experience to present relevant content to the right person, while also presenting key opportunities for them to see what their "peers" or similar people of similar background are viewing/enrolling into/completing.

2) *Enable a Sense of Community: Allow the learners to contribute and share through social features that build community and peer networks-sharing informal (yet highly valuable) knowledge.*

This leverages the trust and loyalty that are inherent to the association to incubate and serve as a platform for dialogue by its membership and constituents.

3) *Develop Careers: provide tools to effectively manage Professional Education, Continuing Education, and career tracks/specializations.*

4) *Engage the Learner: make the experience appealing and offer the aesthetics of popular websites.*

5) *Provide a solution through the career of a member/constituent: A lifecycle approach to learner engagement, our approach is to provide a "lifecycle" platform that the member, constituent, or credential holder can visit throughout their experience with an association or credential body, with each point providing personalized learning material.*

11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?

- 499 or fewer registered end users
0%
- 500 to 2,499 registered end users
15%
- 2,500 to 4,999 registered end users
0%
- 5,000 to 9,999 registered end users
20%
- 10,000 to 24,999 registered end users
30%
- 25,000 or more registered end users
35%

12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?

- 1,000 or less
0%

- 1,001 to 5,000
5%
- 5,001 to 10,000
15%
- 10,001 to 25,000
15%
- 25,001 to 50,000
25%
- 50,001 to 100,000
15%
- More than 100,000
25%

13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?

- Less than 100
0%
- 101 to 200
90%
- 201 to 500
10%
- 501 to 1,000
0%
- 1,001 to 5,000
0%
- More than 5,000
0%

14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.

Healthcare and financial organizations have a stronger representation in our client list and we are building new functionality to support additional growth in these areas. However, other fields and professions are also finding Crowd Wisdom a key solution for their needs; specifically in fields like accounting, business, engineering, and sciences. Most clients have common needs-independent of their industries, including the following: manage CE/CME requirements, manage all education resources under one "umbrella", deliver content and instructional information with short shelf-lives (webinars, licensing requirements), deliver credentialing or

credential maintenance education programs, and the need to manage personalized interactions with large groups of users.

15. Please list the company's top association clients.

American College of Radiology • American Speech-Language-Hearing Association • American Society of Radiologic Technologists • Institute of Management Accountants • American Optometrist Association • Healthcare Financial Management Association • American Marketing Association • American Occupational Therapy Association • American Orthopaedic Society of Sports Medicine • Chartered Financial Analyst (CFA) Institute • Institute of Financial Operations (IFO) • American Society of Civil Engineers • Colorado CPA Society

16. Please list the company's other (non-association) top clients.

McGraw-Hill Professional • JD Powers and Associates • Corporate Executive Board • University of Colorado • Northwestern Memorial Hospital • Akamai

17. Provide a URL for more information about the LMS.

<http://www.digitalignite.com>

18. Provide any other information or notes relevant to the "General LMS Information" section.

Our core platform, Crowd Wisdom™ is an eLearning platform system built from the ground up with specific features and capabilities that cater to associations, communities of interest, and professional trade groups. It is a platform focused on a learner-centric approach, where other LMS platforms typically focus on the administrator of the platform. Our goal is to help greatly improve the learning experience to raise the bar for professional education, development, and education publishers. Crowd Wisdom is designed to help deliver exceptional Professional Education programs through simplicity of design, aesthetically pleasing interfaces, powerful search, access through mobile and tablet devices, and the ability to manage/deliver both formal education

that the association creates or licenses AND the informal knowledge created by the community. The product name, Crowd Wisdom™ is meant to underline our goal to provide a platform for knowledge sharing and exchange between learners.

LMS Implementation

1. In calendar days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

120

Typical

90

Simple

45

2. Briefly describe the implementation process. *Because we are a SaaS-based platform and a technology company focused on quick, iterative releases, standard implementation times are 3 months or shorter. Typical implementations will see the bulk of the work be completed within 60 days. Where we typically see delays: in internal client decision making for approvals/ feedback at milestones or in delivery of key source information/files. As a philosophical foundation, Digital Ignite grounds its approach on the belief that high stakes learning technology projects must be iterated mainly because extended time between releases can only cause a lack of calibration with feedback from stakeholders and end-users. And typically, expectations grow as time passes, while the patience of stakeholders*

decreases. In short, this is an un-winnable scenario in most cases. Therefore it is paramount in this type of project that we outline “cycles” or “mini releases” that build toward a final goal, and that each cycle provides tangible outcomes for the audience to judge. We recognize that our clients may have adopted other proven project management frameworks, and our iterative process will complement and work within that framework as deemed necessary. As a highlight, we suggest the releases leading toward production be held in a format featuring these key activities and milestones:

- Define scope
- Break scope into feasible “cycles”
- Get approval and work off initial list, develop prototypes and mockups to “visualize”
- Adjust list as needed as project team receives feedback from predecessor cycles
- Release a version, and then gather feedback
- Incorporate feedback into a list and prioritize the list
- Refine and release further iterations
- Repeat this process as needed

3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.

Our team will be led by our VP of Client Success, Christina Turner, the strategist and head of all our client implementations. Christina (Tina) comes from a long, successful career supporting such programs for leading associations on a global scale. Tina is well versed in the challenges and goals associations have to build programs and make them profit centers. She has successfully led worldwide efforts to design and develop strategic, critical eLearning initiatives for professional organizations. Working with Tina will be a team focused on providing value and delivering on our promise to build an engaging experience:

- *Day-to-Day Project Manager: a dedicated person to handle the project plan’s daily management. The project team all have significant experience in overseeing association technology programs.*

- *Senior Executive Lead Manager: VP of Client Success will co-lead major milestones and discovery.*
- *User Experience Leads: will help in building out the user experience both at the portal level and potential content projects to develop learning modules.*
- *Technical Lead for Customizations and Integration: an integration engineer will lead all technical discussions. She or he reports into John Sun, CTO and architect. John oversees the teams within application development and professional services.*
- *Product Expert and Administrator support: A white gloves team expert is an on-demand, named resource who will serve you directly to upload courses, manage the platform, and provide immediate relief as needed through the implementation.*
- *Executive Sponsors: joining Tina Turner as an executive on the project will be Tamer Ali. Tamer will be available and a phone call way for supporting any needs. Furthermore, at key milestone meetings, one executive sponsor will be attending to demonstrate our level of care and support for the initiative*

4. Please specify the location (by time zone) of company personnel involved in implementation.

-7, -5, and -4 UTC

5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.

Typically, standard implementations would include stakeholders from education/Professional Development, membership/marketing, and IT. A client implementation team would typically include roles such as: a client project manager (the liaison that may interface with all client stakeholders), business sponsor (VP or Director of Education or Professional Development), CIO, membership director, marketing specialist, and IT integration specialist. Description and time requirements include:

- *Client project manager: 2-4 hours a week, likely a half-day per week in initial month, then decreasing. Handles the direct contact with the DI Project Manager and day-to-day interactions, and managing client-side decisions.*
 - *VP of Education/Professional development: typically the executive sponsor and attendee of key milestone events. Approves requirements and specifications from discovery phase.*
 - *IT director or CIO: major stakeholder involved in setting requirements for integration and compliance to client IT policies.*
 - *Marketing and Membership: major stakeholder setting rules for branding, messaging, communication plan, and the strategy for marketing the rollout of the program.*
6. Provide any other information or notes relevant to the “LMS Implementation” section.
- Executive sponsorship is key for the success of the implementation so we underline the importance of an involvement at some level during milestone meetings and reporting. We also recommend iterative releases with a key focus on quick and frequent “wins” by deploying pilots of the program prior to full release.*

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$14,000
 - 2,500
\$38,000
 - 5,000
\$75,000
 - 10,000
\$122,000
 - 25,000
\$181,000
 - Unlimited
Not available
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$26,000
 - 2,500
\$98,000
 - 5,000
\$193,000
 - 10,000
\$290,000
 - 25,000
\$395,000
 - Unlimited
Not available
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
Not applicable

4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

5. Briefly describe the pricing model for the LMS.

How Digital Ignite pricing works:

- *Simple pricing model: Our pricing follows a simple model; year one has two components due to non-recurring start-up fees. Subsequent years only have one flat license fee based on active users.*
- *What's included in one-time fees? The costs related to discovery, configuration of features, integration of client systems, migration of content and or data, catalog setup, and initial customization of features. Specifically, these are the activities related to the initial setup of the client learning portal.*
- *What's included in license fees: license fees are the only recurring annual fees. License fees are inclusive of access to all modules of the LMS system (unless otherwise outlined in contract), end-user support, maintenance, back-ups, new features, and new versions of the system.*
- *How is the license fee determined? License fees are tiered rates based on active users. Each tier represents a range of active users at a respective price, for example a tier would be: 1,000 to 2,000 users at a flat monthly fee.*
- *Billing: the software license fee is billed per month based on the tier selected. Billing commences at time of transfer of initial sandbox/development site for client or transfer of admin access- whichever occurs sooner.*

- *Active users defined: Active users are defined as those learners who take courses/tests. Users of other parts of the site such as file sharing, community discussion, and general visitors to the site (with a profile but just browsing) are not counted towards license fees.*
- *Software license fee is all-inclusive: this fee is billed monthly and it covers the license, end-user support, maintenance, upgrades, backups, disaster recovery, and any other operations component to run the platform.*

6. Briefly describe the payment schedule.

Billing for implementation fees are based on progress of work at significant milestones. Billing for license fees are monthly (1/12 of annual license per month) and commence at the release of the sandbox (development) or pilot site for the client.

7. Briefly describe pricing for additional services.

Professional Services are available and billed with fixed fee Scopes of Work. Custom support for end-users are available and scoped separately due to the wide variety of potential packages for in-language support, extended hours, and specialized services.

8. Provide any other information or notes relevant to the "Pricing" section.

There are 4 major optional modules of the Crowd Wisdom system that are priced separately due to their unique nature.

- *Warm Seat: this module is a complete CEU/ CME reporting platform to manage and track live/hybrid event attendance. It provides a workflow and support to list events and their respective sessions to enable a learner to report their attendance at the event's sessions.*
- *Institutional/Group Sales Module: clients with institutional membership or those selling to other organizations/groups require the support for group-based sales and to allow the group to manage their own learners. The Institutional Sales module supports this requirement.*
- *Candidate Work flow: allows our clients to manage an application process for tracking*

candidates with a custom form entry (to support applications to capture user information), approval workflow, and payment for the application. Further logic supports tracking the candidate thru the various levels of mastery in an education program.

- *Portfolio: supports the listing of activities and work responsibilities (such as procedures, surgeries, other career events) that a person seeks to log as a way to track their career performance.*

Technology

1. **If installation of the LMS on client servers is an option, what are the server operating system and database configurations supported?**

N/A, we are a completely hosted system, we do not offer an install solution.

2. **Briefly describe the technical framework and code structure of the LMS.**

A scalable Java framework similar to Netflix.com and LinkedIn.com, using AJAX and html on the interface, with MySQL on the database level. An API interface facilitates integration with .Net, Java, PHP or other frameworks that might be employed at a client site.

3. **Briefly describe the LMS's ability to share data for the purposes of migration and integration.**

DI Grand Central provides a flexible interface that facilitates integrations with our clients' applications, systems, external content libraries from publishers. This integration interface is a neutral interface that can interface with industry supported, platform independent protocols in web-services via SOAP, WSDL, RESTful api. This means, no matter the platform to be integrated with Crowd Wisdom™ -- whether it's in .Net, java, PHP, or other programming language, we can facilitate the integration with Crowd Wisdom and the platform, so long as the platform communicates via standard industry protocols. Our experience has included integration with top AMS providers (TMAR Personify, TiMMS,

Avecetra Enterprise and Web, iMIS, Go Members), Oracle, PeopleSoft, Computer Associates, and even custom databases and CRM packages.

Common data exchanged in integrations include:

- *SSO and profile information about the learner Grades, Certificates, and CEU/CME units earned*
- *Content from Content Management Systems and Ad Servers*
- *Activity from the learning portal such as logins, launches, and enrollments*
- *Integration with Content Providers and Publishers*
 - ▶ *Many professional organizations seek to provide a large library of content to their members and overall community. DI Grand Central offers an easy interface to adjust to the many libraries and external content providers you may use or seek to integrate with to offer to your members through a central portal. Grand Central makes this possible; and this "consolidation" of integration points is seamless to the end-user member.*

4. **Briefly describe the scalability of the LMS and its ability to handle heavy loads.**

- *Load and Performance testing:*
 - ▶ *DI continuously tests and analyzes data to ensure that our platform and features can handle the scale and load necessary to meet the demands of our clients' learning audience.*
 - ▶ *At any one time, thousands of users can be accessing the system, so our platform must accommodate. Our standard processes include constant monitoring, platform load and performance testing, and testing of page download times for end-users across the world.*
 - ▶ *Third party services are employed to assess download and performance across the world. Furthermore, our hosting infrastructure is designed to host content files (Courses and learning files) on Amazon Cloud and content delivery network (CDN) thereby facilitating delivery*

ASHA Test Convention 2010

11/18/10 - 11/20/10 | Silver Spring, MD | PDH: 1.0, CEU: 0.1 [Download Certificate](#) [Email Certificate](#)

Crowd Wisdom's Warm Seat allows instructors to host live lectures and monitor attendance. After completing any assignments necessary to the lecture, learners are then instantly granted CE credit, a certificate, and credit on their transcript.

Events > Sessions

Find Sessions

Find sessions you attended at **ASHA Test Convention 2010** and select "Add" to record for credit.

11/19/2010
Sort by Time

1674 November 19, 2010 8:00 - 10:00 AM Add
 Elyse Shumway, Aura Kagan, Lorraine Podolsky

3 oz. Water Test: Effectiveness Utilizing Videofluoroscopy

1869 November 19, 2010 8:00 - 9:30 AM Add
 Danielle Falciglia, Cathy Lazarus, Debra Suiter, Steven Leder

A Cat in Therapy: Cute, but Effective?

1615 November 19, 2010 8:00 - 9:30 AM Add
 Valerie Boyer

A Comparison of Two Code-Related Preliteracy Interventions for High-Risk Kindergarteners (Act 48)

1616 November 19, 2010 8:00 - 9:30 AM Add
 Melissa Kern Fitzgerald, Kathleen Scott, Jenny Roberts

AMA PCM® Program Application

1: Application 2: Confirmation 3: Release 4: Payment

Thank you for your interest in the American Marketing Association's Professional Certified Marketer (AMA PCM®) program. By choosing to participate and become certified, you are affirming your commitment to excellence in marketing.

Questions?
 Contact the AMA at 1-800-AMA-1150, extension 9039, or pcm@ama.org.

General Information

Note: Please contact the AMA if your first name, last name, or email is incorrect.

First Name:

Last Name:

Email:

Address:

City:

State/Province:

Zip/Postal Code:

Country:

Phone:

Digital Ignite developed an application with AMA to help its Professional Certified Marketer admission process. The new application requires cursory employment and educational information, and the system will automatically either accept the application, or notify the applicant that while their application may be considered, it does not meet the minimum requirements of the program

Employment

Total years of marketing experience:

Company Name	Start Date	End Date	
Digital Ignite	1/1/12	9/10/12	Edit Remove

[+Add Employment](#)

Education

University/College	Degree Type	Degree	Degree Year	
Wheaton College	Bachelor	Business	2012	Edit Remove

[+Add Education](#)

[SAVE & CONTINUE >](#)
 Step 2: Confirmation

and scalability of content like e-learning courses and multimedia.

- ▶ *To test, we enforce rigorous procedures for our QA team to simulate real scenarios. We typically follow industry standards, but our approach includes but is not limited to the following.*
- *Platform and Feature load testing concepts:*
 - ▶ *Simulate real world access but with heavy concurrency and repeated actions—to avoid “think and user idle/delay” times that may happen in real life but do not expose system weaknesses*
 - ▶ *Document performance of infrastructure throughout process to ensure system performance is not adversely impacted by bottlenecks*
 - ▶ *Stress test features by engulfing it with users and concurrent changes/configurations*
 - ▶ *Profile system components to expose “hidden” issues and scale perfectly.*

5. **Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.**

Because we use Cloud-hosting for all content management, the technical infrastructure is not limited by such limitations and can scale gracefully as needed. Client contracts provide liberal storage and bandwidth limits at each license tier.

6. **Provide any other information or notes relevant to the “Technology” section.**

It is our intent to serve as the leading platform for professional education and therefore we are on a continuous march to improve the features and the performance and reliability of our platform.

Coming soon will be 1) newer features to improve our existing support for tablets (iOS and Android) access 2) adding a second, dual hosting environment to provide geographic redundancy on top of our redundant infrastructure.

System Requirements

1. **What are the technical requirements for an end user to access the LMS?**

Crowd Wisdom™ System Requirements

- *We try to keep a simple rule of thumb: learners need and should have simple, intuitive access without obstacles to the learning experience - similar to how they access their preferred banking or travel site.*
- *Most common profiles support: So we aim to cover the most common settings and configuration- while making a key focus on system performance and a good learning experience. This means: fast page downloads, image views, and multimedia streamed smoothly through a Content Delivery Network (when possible and acceptable for the client.) Digital Ignite delivers on an international scale, reaching learners all around the world, leveraging a globally-scalable infrastructure.*

Operating Systems and Devices

- *We standardize access to the Windows versions XP and above, and Mac OS X 10.6+*
- *Crowd Wisdom™ will maintain active support for the 2 most recent public versions of Android and iOS device platforms*

Browsers

- *Internet Explorer: We have officially supported IE 7 and up (unofficial support of IE 6.0 due to Microsoft’s own warnings).*
- *Mozilla Firefox and Google Chrome: (most recent 2 public versions).*
- *Safari: We also support learners on Safari and Google Chrome.*

Connection speed

- *Connection speeds of 56kbs and above are acceptable, broadband access will obviously improve learning experience within courseware itself.*

Plug-Ins, Add-on Components, and Multimedia Support

- *No required downloads for the Crowd Wisdom™ platform. However, courseware and learning materials requirements vary and*

will depend on the content itself and its publisher's requirements. It is our experience that most e-learning courseware typically requires specific plug-ins such as Adobe Flash to view multimedia.

2. What are the technical requirements for an administrator to access the LMS?
Same as end-user. There are no special access requirements for admins. They access securely with their own logins to the same portal using standard desktop access.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the "System Requirements" section.
Crowd Wisdom currently supports full learner features and access via Android and iOS platforms (iPad and iPhone) and will be providing new skins specifically designed for such platforms in late 2012 and early 2013.

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
100%
2. Briefly describe the typical types of integration for the LMS.
 1. *SSO: integration with the authentication process*
 2. *AMS: typically includes shopping cart, grades, transfer of CEU/CME history, certificates earned, and product sync (sending education product info to the learning portal to list items in the learning portal)*
 3. *Course Publisher or Library: integration via AICC/SCORM or web service to a content provider*
 4. *Webinar platform: WebEx, Adobe, GoToMeeting*

5. Accounting system: learning purchases and reports for financial data sent to accounting

6. Historical transcripts: grades and certificate data migrated to house in our platform as a central database of learner performance (potentially secondary to AMS).

7. Social Media: integration with a social media platform to flow users between LMS and an existing community on association social media platform

3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
 - *SCORM: elearning protocol*
 - *AICC: e-learning protocol*
 - *IMS QTI: test and question protocol for import/export*
 - *SOAP: web services*
 - *XML: for data exchange and integrations/web services*
 - *RESTful: web services and embedding Crowd Wisdom widgets onto your web sites*
 - *SAML or LDAP: authentication*
 - *FTP: data can be sent via batch (secure FTP)*
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
Planning sessions within the implementation/discovery phase are dedicated to integration. User flows and diagrams are developed along with a detailed specification. Sample data formats are reviewed and share, followed by full integration in a development sandbox. The integration is then tested for accuracy and performance. Following testing, the integration code is released to production.
5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect ✓
 - Elluminate
 - Genesys
 - GoToWebinar ✓
 - Microsoft Live Meeting
 - ReadyTalk
 - WebEx ✓

- Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify)
6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
- Aptify (Aptify) ✓
 - Association Anywhere (ACGI) ✓
 - ClearVantage (Euclid)
 - CRM for Members (ProTech) ✓
 - iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap) ✓
 - netFORUM (Avecra) ✓
 - Office Manager (internet4associations)
 - Personify (TMA Resources) ✓
 - TIMSS (TMA Resources) ✓
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS ✓
 - The LMS has never been integrated with an AMS.
 - Other (please specify) ✓
Custom databases and Oracle.
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
- ACGI CMS Anywhere ✓
 - BrowserCMS
 - DotNetNuke ✓
 - Drupal ✓
 - Ektron ✓
 - Joomla! ✓
 - Microsoft SharePoint Server ✓
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS.
 - Other (please specify) ✓
Sitefinity, RedDot, Sitecore.
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
- No. Interoperability will be facilitated through Crowd Wisdom's web services interface called Grand Central.*
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
- Yes. OS commerce, Oracle e-commerce, Microsoft. Multiple commercial and custom ecommerce systems including shopping carts from AMS platforms such as Personify, TIMSS, iMIS, and Aptify.*
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
- Yes. Adobe Captive, Adobe Presenter, Articulate Studio, Articulate Storyline, Lectora by Trivantis, Toolbook, Moodle, Mediasite, and multiple other tools, including Custom course authoring tools.*
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
- Yes. Questionmark. Digital Ignite offers its own platform for authoring and delivering tests and assessment called Himalaya Test Engine. It is employed by our clients to deliver assessments, high stakes certification exams, quizzes, and self-assessments.*
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
- Yes. Survey Monkey and Zoomerang have been used within learning platform and courses/ learning items.*
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
- Yes. SmartPro's, SkillSoft, General Electric, Philips, Harvard Business Publishers, and multiple academic and smaller, niche education providers.*

14. Provide any other information or notes relevant to the “Integration and Interoperability” section.
- Advanced integration options exist to embed digital ignite functionality as a “widget” or web component into a client web site similar to how a widget would be embedded from other 3rd parties like YouTube, Vimeo, or Twitter. Additional integrations that have been implemented include:*
- *Integration with Ad server to allow client to display advertisements*
 - *CE Repositories to report CEU/CME earned*
 - *Integration with CMS to pull content for display on the Crowd Wisdom portal*
 - *AMS profile information to display as a widget on the learning portal*

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium ✓
 - Medbiquitous ✓
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - Section 508 ✓
 - The LMS does not produce content that conforms to any of these guidelines or standards.
 - Other (please specify) ✓
Specifically QTI of IMS.
2. Can the LMS play content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium ✓
 - Medbiquitous ✓
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.

- Other (please specify) ✓
Web services that may be used by publishers can also be integrated to launch.
3. Provide any other information or notes relevant to the “Standards and Guidelines” section.
2 notes:
 - *Himalaya Testing Engine: supports interoperability by importing and exporting in standards-based formats including IMS QTI, CSV, and XML. This enables our clients to easily port over content from legacy systems or from large banks of questions/assessments.*
 - *Section 508 of the US Rehabilitation Act and Web Content Accessibility: we are strong supporters of the spirit and intent of this and other web accessibility initiatives.*

In our work history as a team, we have deployed large-scale, accessibility-standard-compliant learning applications and on-demand support tools including work for major associations/professional organizations, publishers like McGraw-Hill Professional and two major government entities. We have a strong comfort in Section 508 requirements and we support the intent of its corresponding law/legislation. For most clients, we recommend that we create a specific stylesheet and allow user-selected access to an alternate view of a portal to meet the rigorous requirements of 508. By design, we do not attempt to introduce accessibility roadblocks, however, given the potential use of AJAX and fancier web techniques, compliance will be difficult unless handled in this fashion.

Hosting

1. Is the LMS available as a *company-hosted* solution?
Yes
2. How many LMS installations are hosted by the *company*?
40

3. Is the LMS available as a *client-hosted* solution?
No
4. How many LMS installations are hosted by the *client*?
Not applicable
5. How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner ✓
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify) ✓
Jointly monitored by a leading commercial hosting operations and DI team members
6. If the company's LMS hosting is provided by a partner or partners, please list the name(s).
Rackspace, Amazon.
7. Briefly describe the company's preferred or recommended hosting option.
Hosted Software-as-a-Service (SaaS). We operate a 100% web-based hosted operations- handling all maintenance, upgrades, end-user support, backups, disaster recovery, and failover warm site.

By early 2013 we will also be releasing geographic redundant facility to add another layer of redundancy to our existing physically redundant environment.

8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
The standard service maintenance is scheduled and arranged on the lowest activity window, over Saturday to Sunday night at 11.59pm (Saturday night) to 3am (Sunday morning). Weekly emergency and patch window is Wednesday (11.59pm) all times Eastern US time.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing ✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations

The dashboard is the learners' central hub.

10. Provide any other information or notes relevant to the “Hosting” section.
 - *Clients receive a full staging (Sandbox) environment to create a replica of the live (production) environment. This provides a way to ensure quality of the final experience, and enables testing of all integration points.*
 - *All client videos and multimedia can be hosted and streamed using optimized infrastructure (Amazon) that is included as part of license fees.*
 - *New, dual hosting environment to be added by end of 2012 to allow geographic redundant capabilities to add to the existing physical redundancy.*

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
No
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users’ prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
Yes
6. Provide any other information or notes relevant to the “Personalization” section.
Personalization feature can be integrated with AMS profile so that professional fields of interest or other demographic fields within the AMS are

the inputs needed to drive personalization on Crowd Wisdom.

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
Yes. Branding for clients can be configured via CSS and HTML. Text, labels, interface elements, and navigation can be customized and configured specific to each client. Custom widgets and tabs can also be added for enterprise clients.
2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).
No
3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.
Yes. Tabs, labels, navigation, and widgets can all be customized. Entry points where a learner “lands” in the learning portal can be configured as well.
4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.
Yes. Admins configuration can control what various admins roles can view and control.
5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
Yes. Elements on the interface and navigation can be customized and vary based on groups or audiences that may be visiting your learning portal. For example, layouts and features can be different for members than they are for non-members.

Refine Search Sort By

I'm looking for Keywords & Title Abstract & Description

Results 1 - 10 of 196

Audience	Format	Title	Credit(s)
Audience O.D. Paraoptometric Student	1	2012 Optometry's Meeting Poster Presentations View Details Launch	
	2	5 Minute Retina: Rapid Fire View Details Launch	
	3	A Brief Guide to SMART Goal Setting View Details Launch	
	4	A Six Step Approach to Visual Field Analysis View Details Launch	
	5	ABN Form View Details Launch	

The catalog displays courses and materials available to a particular user, which can be organized by sorting and filtering and added to the shopping cart for immediate purchase.

Most Subscribed

- Himalaya Sample Exam - demo
- CMA Online Intensive Review Course Part 1
- Chronic illness in the Trauma room
- Insurance Verification and Coordination of Benefits
- Webinar Demo

A widget displays the most popular items based on total enrollments and recent activity.

Search the Store

Users can browse as well as search the list of educational products in Crowd Wisdom.

- ▶ Modality
 - ▶ Product Type
 - ▼ Topics of Interest
 - Patient Care Skills
 - Practice Issues
 - Radiation Protection
 - Special Offers
 - For Educators
 - Management
 - Career Information
 - Communications Skills
 - Fluoroscopy
 - Fusion
- 1 2

6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.

Yes. Due to the configuration of rights, content can be customized for what the admin views.

7. Provide any other information or notes relevant to the “Interface Configuration” section.

Clients can choose to push content onto the Crowd Wisdom platform from a Content Management System (CMS).

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

Yes

2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

Yes

3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?

Yes

4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?

Yes

5. Can administrators change the default time zone used for formatting dates and times in the LMS?

Yes

6. In how many countries has the LMS been implemented for clients?

172

7. Please list the countries where the LMS has been implemented for a client.

Based on web analytics and learner profiles, we have users from over 172 different countries accessing client portals.

8. In how many languages has the LMS been implemented for clients?

1

9. Please list the languages in which the LMS has been implemented for a client.

English, however system can be translated to any language including multi-byte languages. Clients have used Crowd Wisdom to display content in Arabic, Chinese, French, Hebrew, Japanese, and Spanish.

10. How many language packs are available for the *end-user* view of the LMS?

0

11. Please list the languages for which a language pack is available for the *end-user* view.

Not applicable

12. How many language packs are available for the *administrator* view of the LMS?

0

13. Please list the languages for which a language pack is available for the *administrator* view.

Not applicable

14. Provide any other information or notes relevant to the “Internationalization and Localization” section.

Clients wishing to serve multiple audiences can also configure multiple language views and ask the constituent for their preferred language- which can be then selected by the end-user as their preferred language OR be transferred seamlessly from the AMS. The system will then configure the language of choice upon each login of the respective user.

Search and Catalogs

- How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify) ✓
Can create single, multiple, can contain items other than courses, end-users view/search before authenticating, various enrollment options. OTHER: items can be set to display only for promotional-preview purposes.
- What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users ✓
 - The LMS does not support search by end users.
 - Other (please specify) ✓
Search knowledge base, which is our wiki product.
- What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓

- Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify) ✓
Search for: certificates issued, products, and orders
- Provide any other information or notes relevant to the “Search and Catalogs” section.
There is no limit to catalog groupings or items to be listed. Catalogs can control pricing, availability, and access for various audiences. For example, Members can see a unique listing compared to other audience members. Catalogs can be auto-created through web services integration with client AMS or other source database. Clients use this functionality to manage specialized groups with specific content requirements such as certification paths.

Authoring, Managing, and Displaying Learning Content

- Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education ✓
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify) ✓
Also can manage content that is licensed by our clients but are housed or hosted elsewhere with a 3rd party publisher.

2. By which criteria can online courses be marked completed?
- The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user's status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify) ✓
Survey/evaluation complete, minimum score for average of multiple items in a curriculum.
3. Does the LMS provide the ability to author learning content?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
Test and Survey authoring are standard features. Third Party for course authoring. For Curricula we offer the capability to bundle any number of items into a curriculum. For courses, we adopt to any tool that outputs to elearning standard formats AICC and SCORM.
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
- Multimedia uploaded will automatically play in an appropriate player. Further, the player adapts to the end-users device settings- therefore, if they are accessing with a device (such as an iPad) that requires specific player settings (HTML 5) the player will adjust accordingly to play in such a format that functions on the device.*
5. Does the LMS support offline authoring of learning content?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
We support and launch courses authored in SCORM and AICC conformant formats including but not limited to Articulate, Adobe Captivate, Adobe Presenter, Trivantis Lectora, and others.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Check in/ check out functionality
Third-party
 - Ability to review content before it is published
Third-party
 - Ability to assign tasks to administrators
Third-party
 - Ability to monitor progress on tasks
Third-party
 - Ability to add internal comments (viewable only by other administrators) to content
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
8. Can the LMS generate printer-friendly content?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
*For our testing engine, the answer is "Yes".
For various SCORM or AICC content, this is dependent on the design of the course itself.*
9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the digital rights management functions.
10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
 - Browser-delivered online content
 - Downloadable version
 - CD or DVD
 - HTML
 - SWF
 - PDF
 - Other (please specify) ✓
Dependent on the course authoring tool in question.
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?

- Standard ✓
- Semi-standard
- Completely custom
- Third-party
- Unavailable

18. Does the LMS provide the ability to make a document library available to users?

- Standard ✓
- Semi-standard
- Completely custom
- Third-party
- Unavailable

19. Briefly describe the company’s preferred or recommended authoring tool (which may or may not be the company’s own tool).

Although we do not recommend one tool over another, clients should consider tools supported by a large population of knowledgeable developers and support resources. This criteria typically qualifies Adobe Captivate, Articulate suite, and Lectora as tools of note. All three are fully supported by Crowd Wisdom.

20. Provide any other information or notes relevant to the “Authoring, Managing, and Displaying Learning Content” section.

Himalaya Testing engine is a built-in, full authoring suite for testing/quizzes/assessments. It includes a question and test repository, resource file library, test controls, and data analysis (benchmarking, score reporting, question answer breakdown). Advanced test controls support multi-section tests (parts scored separately), reusable question banks, and security settings. This entire test platform is fully functional in tablet devices as well (iOS and Android). In addition, by late 2012, a new “skin” for Himalaya tests will be released that is optimized specifically for tablet users.

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Administrative calendar for courses
Third-party
- End user calendar for viewing course options and schedules
Semi-standard
- Waitlisting
Standard



American Society of Radiologic Technologists

A view of a user’s active course subscriptions (enrollments) in Crowd Wisdom

ASRT Home My ASRT Store Community **My Learning** My Purchases My CE Record

Enrolled Grades Credits

Title	Grade (%)	Time	Completion	Start Date	End Date
CT Basics Module 3: Data Acquisition - Credit Version ★★★★★ (0 votes) View Details Launch	100	00:01:46	Completed	1/1/10	10/1/11
CT Basics Module 2: Equipment and Instrumentation - Credit Version ★★★★★ (0 votes) View Details Launch					
CT Basics Module 7: Procedures - Credit Version ★★★★★ (0 votes) View Details Launch	50	00:03:05	Completed	1/1/10	1/1/12

CT Basics Module 2: Equipment and Instrumentation ... Close

Average Rating : Poor ★★★★★ Excellent (0 votes)

CE Credit: 1

- Personnel management (for scheduling instructors and facilitators)
Third-party
 - Facility management (for scheduling rooms)
Third-party
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Third-party
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Standard
2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
- Yes. Warm Seat is an optional, add-on module to help clients manage in person conferences. The module enables organizations to list events and organize sessions within these events to allow event registrants to search/browse and then select those sessions they attended. A client-specific workflow can then trigger session and or event evaluations and assessments. Upon submission of their attendance record, a learner can immediately earn the respective CEU/CME and certificate(s).*
3. Provide any other information or notes relevant to the “In-person, Place-based Courses” section.
- Class-based events can be listed with location, handouts, maps, rules, and a calendar file to add to the learner’s MS Outlook, iCAL, Google, and Yahoo calendars. In addition, pre- and post- event emails can be triggered for reminders, evaluations, and self-assessments.*

Webinars

1. Does the LMS provide integrated Webinar functionality?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
Integrations exist for WebEx, Adobe, and GoToMeeting. In first quarter 2012, ReadyGo conferencing.
2. Briefly describe the company’s preferred or recommended Webinar software.
No preference, however the platforms listed above are preferred given existing integrations. So long as the platform has a stable integration capability like a web service, we can integrate.
3. Provide any other information or notes relevant to the “Webinars” section.
An added benefit to webinar integration is that the resulting event recording (after the webinar is conducted) can be retrieved (if the webinar platform allows it) and placed within the learning portal for the end-user. This provides an easy, user-friendly way to present post-event file without requiring user request or searching.

Registration

1. How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify) ✓
By using an existing (standard) web service from an AMS or other system.

2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
4. Does the LMS provide self-serve password recovery help for end users?
Yes
5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
7. Can the fields for end user profiles be added, edited, and deleted?
Yes
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
Yes
10. Provide any other information or notes relevant to the “Registration” section.
 - *DI holding tank is a product that allows us to seamlessly migrate former records and grades into our system upon transfer of the learner to the new learning platform on Crowd Wisdom.*
 - *This is an optional feature of our system that helps migrate and clean up user records. The process entails the DI team placing all your legacy user records into a new, temporary database or “Holding tank”. Then, we validate this data, check and clean up dupes, and standardize the data, making sure it checks with the fields you seek to capture.*

- *Then, we configure the user login process to check the holding tank upon the first and only the first login by any learner on the new learning platform. So at initial login for a learner, our process seamlessly checks the holding tank for older records the learner may have, then- if they are present- the logic appends those records to the new record on the new system. The user now has their history carried over to the new system, and will not go thru the holding tank process again.*
- *Event Attendee Registration and Management: Clients can manage group and institutional members through a Crowd Wisdom feature that allows the registration of the group, designation of group admins, and the allotment of education items to display for the respective group- including pricing.*

Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify) ✓
By web service from AMS or other client system.
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes
3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level ✓
 - By course group ✓
 - On a course-by-course basis ✓

- On an end user-by-end user basis ✓
 - Other (please specify)
4. Can enrollments occur based on end user-specific criteria?
 - The end user's role in the system ✓
 - The end user's score on an assessment ✓
 - The end user's completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)
 5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes
 6. Provide any other information or notes relevant to the "Enrollment" section.
Product bundles or what we call "packages" can be ways to organize large libraries of content where users can access to a CEU/CME library of courses provided by a publisher. This way, the user only enrolls once into "library" and has access to all items within the library, without needing to enroll in each of the items within the library.

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
Yes
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
Yes
3. To what types of learning content can credit be assigned?

- Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify) ✓
AMS feed to the Crowd Wisdom system.
 5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify) ✓
AMS feed to the Crowd Wisdom system.



[My Purchases](#) [My CE Record](#)

Enrolled **Grades** Credits

Title	Grade (%)	Time	Completion	Start Date	End Date
CT Basics Module 3: Data Acquisition - Credit Version ★★★★★ (0 votes) View Details Launch	100	00:01:46	Completed	1/1/10	10/1/11
CT Basics Module 2: Equipment and Instrumentation - Credit Version ★★★★★ (0 votes) View Details Launch	<div style="border: 1px solid gray; padding: 5px;"> CT Basics Module 2: Equipment and Instrumentation ... Close Average Rating : Poor ★★★★★ Excellent (0 votes) 1/11 CE Credit: 1 </div>				
CT Basics Module 7: Procedures - Credit Version ★★★★★ (0 votes) View Details Launch	50	00:03:05	Completed	1/1/10	1/1/12

[My Purchases](#) [My CE Record](#)

Enrolled **Grades** Credits

Grades for year

[Export PDF](#)

Results 1 - 10 of 15

Title	Grade (%)	Time	Completion	Start Date	End Date	Credit(s)
CT Basics Module 3: Data Acquisition- Course ★★★★★ (0 votes) View Details Launch	0	00:00:03	Completed	3/11/11	10/1/11	
CT Basics Module 3: Data Acquisition- Test ★★★★★ (0 votes) View Details Launch Certificate Test Details	100	00:01:46	Passed	3/11/11	10/1/11	
CT Basics Module 3: Data Acquisition - Credit Version ★★★★★ (0 votes) View Details Launch	100	00:01:46	Completed	1/1/10	10/1/11	default:1.0
CT Basics Module 2: Equipment and Instrumentation - Credit Version ★★★★★ (0 votes) View Details Launch	100	00:24:40	Completed	1/1/10	10/1/11	default:1.0
CT Basics Module 7: Procedures - Credit Version						default:2.0

[My Purchases](#) [My CE Record](#)

Enrolled Grades **Credits**

CE for year

Name	Completion Date	CE Type	Credits	Credit Year
CT Basics Module 7: Procedures - Credit Version	3/10/11	default	2.0 / 2.0	2011
CT Basics Module 2: Equipment and Instrumentation - Credit Version	3/11/11	default	1.0 / 1.0	2011
CT Basics Module 3: Data Acquisition - Credit Version	3/11/11	default	1.0 / 1.0	2011

You have earned:

default	4.0 / 4.0
	4.0 / 4.0

The three screens here show the My Learning tab, which provides a quick view of courses learners are currently enrolled in. The Grades subtab allows learners to view all courses, past and present, and view the details of their enrollment including grades, dates, and credits granted. The Credits subtab shows learners a transcript of grades and CE credits earned.

6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
- By the user claiming the credit ✓
 - By the user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify) ✓
AMS feed to the Crowd Wisdom system.
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
- Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify) ✓
Certificates can be assigned to packages or product bundles too.
9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline) ✓
 - No
 - Other (please specify) ✓
Through integration with content providers and publishers.
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users) ✓
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
Yes. The client can set the acceptable activities, procedures, and other acceptable entries into the portfolio. Also, the client can configure a requirement that a supervisor confirms the activity.
14. How many clients use the LMS to manage continuing education or certification?
30
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE) ✓

- Certificate of successful completion ✓
- Credit towards completing or maintaining a certification, licensure, or other credential ✓
- Credit towards a degree at a college or university ✓
- No clients are using the LMS to manage continuing education or certification.
- Other (please specify) ✓

Credit towards a optional certification for leadership or higher achievement.

16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.

We offer an unlimited support for types of CE and how a CE is defined and assigned. Many clients assign multiple types of CME to a single product and have complex rules on what a specific job role can earn for the same product. Crowd Wisdom can support custom business rules to support this variation of credit due to the person’s role, for example: a Physician will receive different credit for the same course as a Nurse.

Assessments

- Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
- How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)
- Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another may only require users to achieve a 70% to pass)?
Yes
- Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
 - Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment) ✓
 - No
 - Other (please specify)
- How does the LMS provide for automatic feedback for assessments?
 - Per question ✓
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option ✓
 - Based on which distracter the end user selected ✓
 - Per assessment ✓
 - Based on the end user’s overall performance on the assessment ✓
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify) ✓
Sections within a test can also be created for feedback on sections and Learning Objectives and Pools.
- Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
- Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
Yes
- Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
- Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question

ASRT Demo

Question 3 of 11 (ASRT-4)

 Flag for Review

Which of the following may result in grid cut-off?

- an off-center tube
- grid motion being started before exposure is made
- improper SID being used with a focused grid
- increased OID

Previous

Check Answer

Next

Actions

Flagged Questions

View all Questions

My Notes

Pause Test

Submit Test

Two questions in Crowd Wisdom's Himalaya test engine, the one below with media

ASRT Demo

Question 5 of 11 (ASRT-1)

What does this image indicate?



- Magnetic Resonance Imaging
- Ultrasound image
- Fluoroscopy image
- Radiography image

Previous

 Flag for Review

Actions

Flagged Questions

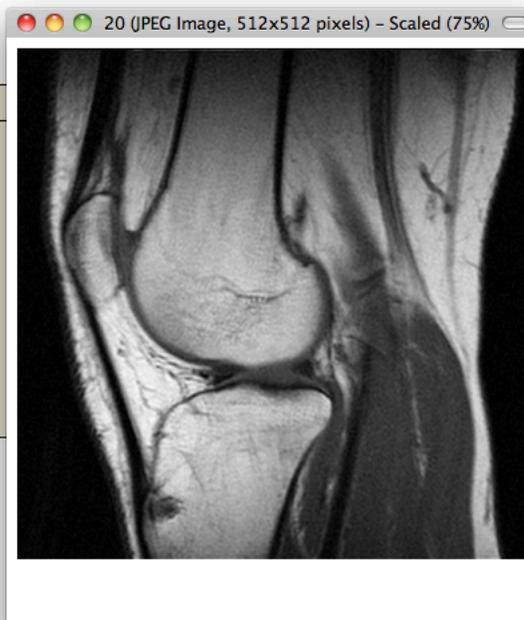
View all Questions

My Notes

Pause Test

Submit Test

Next



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incorrectly, a particular online course (or portion of a course) is recommended?

Yes

10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?

Yes

11. Can the LMS require end users who initially fail to retake an assessment?

- Yes, end users can be required to retake the entire assessment. ✓
- Yes, end users can be required to retake only the questions they previously answered incorrectly.

- The LMS cannot require end users who initially fail to retake an assessment.
- Other (please specify)

12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?

Yes

13. Does the LMS allow administrators to create question banks (for reuse purposes)?

Yes

14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?

Yes

15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes) ✓
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order) ✓
 - Hotspot questions (where users must select the correct area of a graphic) ✓
 - Drag-and-drop questions
 - Other (please specify) ✓
- Numeric range to enter a calculation for financial, healthcare and scientific questions.
2) multi-image reference questions for healthcare and sciences.*
18. Provide any other information or notes relevant to the "Assessments" section.
- Testing engine can import legacy question formats from Questionmark, QTI format, and our internal MS Excel template format. Our test services team can also work with you to prepare your legacy content that may currently be in text (csv, plain text, MS Word) to import it into our system- preventing manual entry and error.*

A poll widget created with Digital Ignite's Consensus Engine

Poll

What is your preferred method of continuing education?



■ Live events (conferences, seminars, executive education courses) (38%)

■ Recorded presentations (webcasts/podcasts) (38%)

■ Independent study (print/online journals, books, websites etc.) (25%)

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify) ✓
Ability to send a survey via email.
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
Yes
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
No
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
No
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the

- end user completes the online course with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row) ✓
 - Matrix of choices (multiple answers per row) ✓
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields ✓
 - Date fields
 - Time fields
 - Demographic information ✓
 - Other (please specify) ✓
Pie chart, line graph.
 11. Provide any other information or notes relevant to the “Evaluations” section.
Consensus Engine is our evaluation/survey builder. It provides additional functionality including: 1) option to create a poll as a widget to be displayed to capture feedback and graphically display results in a pie or bar chart, 2) tying evaluation completion to course completion, 3) sending evaluations as a link to complete after a course is completed, 4) assigning CEU/CME to completion of an evaluation.

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes

Why did you choose an online medium for your training needs?

- Topic
- Cost
- Ease of use
- Convenience of time
- Need CEUs
- Quality of course
- Suits my learning preference
- Other

If you selected "other" in question four, please specify.

The online medium for this course was highly appropriate.

Strongly Disagree Strongly Agree

I was able to access all of the resources, such as links and downloads.

Strongly Disagree Strongly Agree

The course presented ideas and techniques that are useful to me in my current job.

Strongly Disagree Strongly Agree

3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?

Yes

4. How does the LMS provide reports?
- Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports ✓
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses) ✓
 - Other (please specify) ✓
We standardize on a globally popular open source reporting suite, so our clients can build their own reports offline and have them stored and run on the platform.

5. How are the LMS reports made available?
- View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify) ✓
XML and PDF formats are also standard.
6. How many standard, pre-configured reports are available in the LMS?
55
7. List and briefly describe the standard, pre-configured reports available in the LMS.
Enrollment reports, Registration reports, user reports, Catalog items, Products, Certificates, Grades, Test scores.
8. Briefly describe the process for creating ad-hoc reports in the LMS.
We standardize on a globally popular open source reporting suite, so our clients can build their own reports offline and have them stored and run on the platform.

Crowd Wisdom's Consensus survey engine can be used pre- and post-course, after specific course modules, or even when users log out of the system.

9. How many custom reports does the company typically develop for a client implementation of the LMS?

2

10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.

Clients requiring very specific data to their organization will have custom reports developed once the portal is launched and they determine specific reporting needs that they need. Typically these are very client-specific and are tied to specialized reporting for:

- 1) specific course(s)
- 2) specific groups within portal
- 3) data needed for accounting system or executive teams
- 4) specific formatting requirements that span multiple report types

11. Provide any other information or notes relevant to the “Reporting” section.

A key strategic goal that will continue with our platform development is to capture and report as much data and analytics as possible. Key points include:

- 1) As a standard feature, Crowd Wisdom can report web activity to Google Analytics to capture visits, session characteristics demographics, and device/browser profiles of users,
- 2) All key user activity is tracked including time, visits, registrations, enrollments, launches into learning material, time in multimedia, and key assessment data.

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client’s different chapters, departments, or programs) from a single implementation?

- The LMS does not provide for multiple sites from a single client implementation.
- Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓

- Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
- Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
- Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
- Each site in a single client implementation can have its own set of customized reports. ✓
- Other (please specify)

2. How many clients have a multiple-site implementation of the LMS?

5

3. On average, how many sites are part of a client’s multiple-site implementation of the LMS?

2

4. Provide any other information or notes relevant to the “Support for Multiple Sites” section.

Clients employ this functionality to support such requirements as:

- 1) separate leadership academies for specific groups,
- 2) segregating chapters to allow them a separate page or feature
- 3) organizing a certification path with only registrants seeing a separate site,
- 4) separating a discussion group and body of knowledge for an editorial group or advisory team.

Collaboration and Communication Tools

- Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Standard
 - End user-to-administrator e-mail
Standard
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Third-party
 - Live chats (for multiple end users)
Third-party

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
We offer a dedicated page for live chat using an integration with leading live chat platform. Future integration coming with ad-hoc chat.
- Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard

Crowd Wisdom supports multiple communities or groups within one site.

Magnetic Resonance Community MR

Explore Communities
Magnetic Resonance

Quick Links

- ASRT Curriculum
- ASRT Practice Standards
- ARRT Content Specs
- ARRT CE Requirements
- JRCERT MR Program Standards
- ICAMRL Accreditation
- ACR MR Accreditation
- ACR Breast MRI Accreditation
- ASRT Job Bank
- Volunteer Opportunities
- COI Rules and Guidelines

Messages

Earn CE credit at the new ASRT Educational Symposium.

Poll

What is the highest magnetic strength of the scanners in your MRI department?

- 1.0 T or lower
- 1.5 T
- 3.0 T
- 4.0 T or higher

Submit

Chapter Delegates

Chairman, Christine Gialousis
yaloosi2@aol.com

Vice Chairman, Meredith Gammons
megammon@wfubmc.edu

Delegate, Sharon Zigan
shazigan@rea-alp.com

Delegate, Christina Thomas
krzycmt@aol.com

Discussion Board

Recent and Active

“The size of patients receiving MRI examinations is increasing with the higher table weight capacities offered by manufacturers. Patients over 500 pounds now may be scanned. How is your facility handling requests to scan such patients, such as sche...”

Ellen Lipman Moderator 3/14/11 11:05 AM (0 Replies)

- Live voice-over-IP
Third-party
 - Virtual whiteboard
Third-party
 - Virtual presentations (e.g., PowerPoint-driven)
Third-party
 - Screencasting
Third-party
 - Application-sharing
Third-party
 - Ability to associate a wiki with a course
Standard
 - Single-point Web camera capability
Third-party
 - Multiple-point Web camera capability
Third-party
 - Networking (e.g., ability for end users to connect with one another)
Standard
 - Ability for each registered end user to have a blog
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Wiki and file sharing features.
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
Yes. No client implementations, however integration can be well supported through SSO and exchange of learner information with the platform.
4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
Advanced community features include:
- 1) *Global search across formal content and social content*
 - 2) *Wiki to maintain a Body of Knowledge or similar database*
 - 3) *File Sharing library to store and share files among the community*

4) Support for both course-level and portal-level community features

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Standard
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Full integration with AMS or preferred commerce solution checkout to seamlessly transfer user at purchase.
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles sales tax, including variations based on the state or region
Standard

Join a Discussion

Recent and Active

“ Let's discuss the top way to "recession-proof" your organization. ”

-- Janet Orano 05/26/09 01:42 PM (13 Replies)

[Go to Discussion](#)

Top Discussions

Who is now building the most efficient car?

-- Anonymous 05/18/09 04:28 PM (9 Replies)

Let's talk kitchen and room service do's and don'ts.

-- Anonymous 05/14/09 10:44 AM (8 Replies)

Is there a better way to advertise hotel perks than TV and radio?

-- Anonymous 05/14/09 10:43 AM (7 Replies)

[View Your Discussion Page](#)

Crowd Wisdom discussion boards

Ask a Question

Recent and Popular

Anyone find success hiring executives from job boards like Craig's List or the Ladders.com?

-- Anonymous 05/25/09 04:29 PM (26 Answers)

[Post a Question](#)

Other Active Questions

How to train all hotel staff within 30 days on Harassment and Ethics training?

-- Anonymous 05/14/09 11:21 AM (10 Answers)

What's the best way to save on hotel laundry expense?

-- Anonymous 05/14/09 10:32 AM (8 Answers)

What's the best way to ensure my distributor is using fair market practices when buying from farmers?

-- Anonymous 08/17/09 08:18 AM (6 Answers)

[View All](#)

[View Your Questions & Answers \(0 new Answers\)](#)

Community question-and-answer platform

Connect with Peers

Find People of similar interests and/or backgrounds

Search for a Peer

by name or email

Advanced Search

Refine search by

Find Peers on a Map

Find By Web Email Contacts

[Go to Your Peer Page](#)

Community search for peers with specific interests, skills, experience

Crowd Wisdom's share feature to allow learners to share Web links and news

Top News from Community

Most Recent (2430) | Top in Today | Last 7 Days | Month | All Time | Most Liked

2 views **Great Radiology source**
acr.org - sdfsfdf
James Smythe posted on 9/1/2009 2:57:25 PM
[0 Comments](#) [Share](#)

2 views **great site for summary of RSS feeds**
p: -
jane smith posted on 8/28/2009 2:56:08 PM
[2 Comments](#) [Share](#)

3 views **For Next AIG Chief, It's Not About Insurance**
p: - some strong points on the value of having an actuary in house at large global firms
Chris Lynch posted on 8/14/2009 7:56:07 AM
[2 Comments](#) [Share](#)

2 views **Career as an Actuary report: Shock therapy kick-starts revival**
ft.com - great article on the growing trends in the field
Chris Lynch posted on 8/14/2009 7:52:01 AM
[2 Comments](#) [Share](#)

2 views **New Autosales boost July 2009 numbers**
p: -
Admin Admin posted on 8/4/2009 10:05:10 AM
[5 Comments](#) [Share](#)

Post an Article

Link:

Your Name:
 use display name

Title:

Description:

Category:

Top in News

Advertisement

Advertisement

- Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Standard
 - Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Semi-standard
 - Automatically maintains order status that can be checked by end user
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Shipping and fulfillment orders have specific web service that can be sent to your fulfillment vendor.
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
 - Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Access codes for access to items by non-registered users such as institutional purchases. coupon codes for discounting and promotion.
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net ✓
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments ✓
 - Protx
 - QuickBooks Merchant Services ✓
 - StormPay
 - WorldPay
 - Other (please specify) ✓
In the preceding questions, we listed current platforms that have been integrated, however, we support any gateway with an integration capability (API). This allows a seamless and secure transaction during the enrollment process.
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.

PayPal Payflow pro is a common platform used by many client organizations. We integrate with the payment gateway already licensed by our clients using secure account information that we store on our secure servers in an encrypted format.

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?

Yes

8. Provide any other information or notes relevant to the “E-commerce” section.

1) Crowd Wisdom supports creation of coupons (for discounting) and access codes (vouchers for enrollment) that can be used within the shopping experience. Coupons can be used for specific item discounting, bulk discounting, entire cart discounting.

2) Institutional and Group sales for Institutional members or company buyers can be supported through digital ignite’s optional Institutional Sales Module. This module supports creation of groups, assignment of courses/prices, and admin (s) to allow the buying group to manage their own learning activity under the main “umbrella” control of your organization.

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Completely custom
 - Live telephone support for administrators
Semi-standard
 - E-mail support for end users
Standard
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Standard
 - Self-serve, searchable knowledge base for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard,

completely custom, or third-party)

Full knowledge base with tips, guides, and video tutorials.

2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Completely custom
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Completely custom
 - Scheduled in-person training at client offices for administrators
Semi-standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Based on contracted client needs. We can make multiple time zones available as requested.
4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Monday thru Friday, 8am to 5pm Eastern US time. Based on contracted client needs. We can make multiple time zones available as requested.

5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Monday to Sunday 8am to 12am midnight Eastern US time. We use a system that immediately acknowledges receipt of email from user and tracks ticket completion. We observe a support prioritization system for assessing urgency and response times in the client contract. Support is available 365 days a year, 8am to 12midnight each day (Eastern US time). Average ticket is resolved within 2 hours or less.
6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Same as learners- prioritized based on client Service Level Agreement that defines clear turnaround times.
7. Briefly describe the company's typical ongoing communication with its LMS clients.
 - 1) *Once a client is live, statistics are tracked monthly on client support needs addressed and user LMS participation. Any areas of concern are addressed immediately by our support manager or, if deemed necessary, by a senior leader.*
 - 2) *We conduct quarterly check-ins with clients to inform them of general activity status and present ideas for advancing their portal.*
 - 3) *At least once per calendar year a member of the senior executive team schedules milestone call or in-person client visit. For clients with interest in ongoing strategic development with DI, we may hold these meetings more often.*
 - 4) *Before and after major new releases of the Crowd Wisdom platform (that occur quarterly) we schedule client webinars to introduce and review new features.*
 - 5) *We also schedule annual user conferences that include educational sessions, roadmap discussions, and client networking/sharing of experiences.*
8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
For client end-user communication, we defer to the client as they typically prefer to be the

originator of such communications. We can provide broadcast messaging services- should the client choose.

9. Provide any other information or notes relevant to the "Support and Training" section.
 - 1) *Service Level Agreement (SLA) is signed between DI and each client. It defines service uptime guarantees of 99.99% and turnaround times for tickets received.*
 - 2) *Ticket system: We use a system that immediately acknowledges receipt of email from user and tracks ticket completion. We include a support prioritization system for assessing urgency and response times in the client contract.*

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
30%
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
As base functionality we allow clients to apply their own branding, tab labeling and widget selection/labeling on their dashboard page. We do not consider this custom programming. Generally our custom programming involves the creation of specialized functionality within the LMS. Examples include:
 - 1) *A special page that only appears for specific groups but not the others.*
 - 2) *A new widget that creates custom functionality such as calculator or specialized calendar tool*
 - 3) *A certificate progress meter to visually indicate a person's progress in a path.*

4) A custom integration to an external service provider

4. Briefly describe the process for used for planning and implementing custom programming work.

We will meet with the client to discuss key stakeholder needs and end user experience desired. We then build a mock-up of the customized functionality for the client to review/sign-off. Using the mock-up we create a Statement of Work (SOW) that specifies deliverables, milestones and costs. We typically release a beta on staging and then based on client approval, move the customization to production.
5. Please specify the location (by time zone) of personnel involved in custom programming.

-7, -5, -4, and +5 UTC
6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.

-6, -5 and +5 UTC
8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.

Our content development team includes seasoned professionals in:

 - *professional development, continuing education, multimedia development, exam prep product strategy;*
 - *instructional designers with technical expertise in complex areas such as finance, accounting, health; audio and video;*
 - *SCORM/AICC course development using standard industry tools and Digital Ignite custom built SCORM wrapper; graphic design; and, practice test item creation and management.*

This allows us to offer a very robust content development service to association clients that goes well beyond most typical industry vendors.

Knowledge Direct Digitec Interactive



Industry focus: health care, finance, and technology

LMS Version: 6.0

Value proposition: *Knowledge Direct is a turn-key LMS and content authoring platform adapted to large associations and smaller organizations with a small support staff. Knowledge Direct integrates with AMS systems for single sign-on and external payment, or includes its own integrated course catalog and eCommerce shopping cart. Associations use the system for tracking, testing, reporting, and automating certificate issuance for eLearners. The platform enables non-technical staff to create and market continuing education, certification, and professional development including self-paced and blended learning events.*

Top clients (associations): *American Society of Clinical Oncology • Direct Marketing Association • Emergency Nurses Association • Association of Clinical Oncologists*

Top clients (non-associations): *The Walt Disney Company • Cisco Systems • Novartis • Genentech • Symantec • Parsons Brinckerhoff*

URL for more information about the LMS:
<http://www.knowledgedirectweb.com>

Three-year pricing: \$42,200 to \$282,200

Hosting: *By company only*

Digitec Interactive

6000 Metrowest Blvd., Suite 200
Orlando, FL 32835

800.942.4537 or 407.299.1800

sales@digitecinteractive.com

<http://www.digitecinteractive.com>



Our Take on Knowledge Direct Some Highlights



Like most companies in this report, Digitec Interactive does not confine its business to the association market, but its learning management system, Knowledge Direct, is offered in a version clearly focused on the needs of associations. Knowledge Direct for Associations provides an integrated shopping cart, automated certificate issuance, and other features relevant to organizations that sell e-learning. Groups like the Direct Marketing Association, the Emergency Nurses Association, and the American Society of Clinical Oncology use the platform.

Digitec is among the subset of companies in this report that offer course design and development services (including mobile apps and games).

- Version 6 of Knowledge Direct (released in March of 2012) incorporated a number of user interface improvements aimed at making the application “more Web 2.0”—e.g., customizable widgets that allow both administrators and end users to tailor their view of the system—and even easier to use—e.g., through the addition of more WYSIWYG editors and by streamlining processes. This is all in keeping with the company’s tight focus on the users and their experience with the platform.
- As part of a standard license, Knowledge Direct provides Direct to Web, a sophisticated authoring tool for converting PowerPoint into interactive training and adding game-like interactions. The authoring capabilities are on par with dedicated PowerPoint conversion tools like Articulate Presenter and can convert PowerPoint to Flash or HTML5 for mobile accessibility, although not all types of interactions and animations are supported in the HTML5 output.
- The company has added a “do it” interaction in Direct to Web. This provides a way for learners to apply what they’re learning and report on that effort via the course interface. The tool collects the learner’s input, which can be printed or saved as a Word document or PDF.
- Knowledge Direct can integrate discussions with courses to support social, peer-based learning as well as interaction with instructors.
- The integrated assessment engine supports “leap” tests for prescriptive learning; if a learner does sufficiently well on a pretest, she can skip certain modules in a course. Pacing can also be controlled by requiring learners to take modules in a set order.
- The standard reporting in Knowledge Direct provides for real-time reporting on course sales. All reports are exportable to Excel, Word and PDF, and administrators can create and save their own reports.
- The integrated support system in Knowledge Direct can route requests to the right person—e.g., instructor, administrator, or Digitec Interactive staff—based on the question asked.
- Knowledge Direct features an integrated platform, Knowledge Direct Live, for delivering live, real-time Webinars.
- The portal auto-detects users’ devices and can serve up content for mobile devices.

Knowledge Direct strikes us as a very easy-to-use system that, in combination with Digitec Interactive’s content development services, covers the full range of capabilities needed for the average association e-learning initiative.

General Company Information

1. When was the company founded?
1988
2. How many employees does the company currently have?
20
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
Digitec Interactive is the developer of the Knowledge Direct® suite of software—an integrated learning management system for mobile and web-based delivered learning for mid to large associations, medical organization, corporations and non-profits. Knowledge Direct for Associations, Digitec’s flagship LMS platform developed specifically for the association market features an integrated eCommerce shopping cart, AMS integration, integrated social networking as well as hands free marketing of the integrated course catalog. Digitec Interactive also produces highly interactive and award-winning eLearning courseware and game-based virtual learning experiences.
5. Provide the company’s contact information.
*6000 Metrowest Blvd., Suite 200
Orlando, FL 32835
USA
sales@digitecinteractive.com
407-299-1800*
6. Provide the URL for the company’s Web site.
http://www.digitecinteractive.com
7. Provide any other information or notes relevant to the “General Company Information” section.
Digitec specializes in integrating its LMS with Association Management Systems, database systems, and external CME systems. Their out-of-the-box LMS system is designed for rapid deployment and rapid course development with a built in PowerPoint-to-Flash-to-Mobile authoring tool. Digitec created Knowledge Direct and has customized for clients to meet specific business needs. Digitec also produces eLearning

courses. Capabilities include mobile app development, instructional design, writing, storyboarding, graphics, Flash animation, audio & video production, and programming for complete concept to delivery services. Digitec is especially known for its game-based eLearning productions.

General LMS Information

1. What is the name of the LMS product?
Knowledge Direct
2. Provide the product version described in this survey response.
6.0
3. When was the first version of the LMS initially released?
10/15/2002
4. Briefly describe the upgrade cycles for the LMS.
Digitec develops and migrates upgrades into the Knowledge Direct LMS two to three times per year.
5. How many associations use this LMS?
26
6. How many organizations in total use this LMS, including associations?
34
7. How many end users are registered in the single largest client implementation hosted by the company?
180,406
8. How many end users are registered in the single largest client implementation hosted by the client?
Not applicable
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
270,000
10. Briefly describe the value proposition for this LMS as it applies to associations.
Knowledge Direct is a turn-key LMS and content authoring platform adapted to large associations and smaller organizations with a

small support staff. Knowledge Direct integrates with AMS systems for single sign-on and external payment, or includes its own integrated course catalog and eCommerce shopping cart. Associations use the system for tracking, testing, reporting, and automating certificate issuance for eLearners. The platform enables non-technical staff to create and market continuing education, certification, and professional development including self-paced and blended learning events.

11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
29%
 - 500 to 2,499 registered end users
24%
 - 2,500 to 4,999 registered end users
21%
 - 5,000 to 9,999 registered end users
20%
 - 10,000 to 24,999 registered end users
3%
 - 25,000 or more registered end users
3%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
 - 1,000 or less
3%
 - 1,001 to 5,000
21%
 - 5,001 to 10,000
18%
 - 10,001 to 25,000
28%
 - 25,001 to 50,000
18%
 - 50,001 to 100,000
9%
 - More than 100,000
3%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
 - Less than 100
31%
 - 101 to 200
9%
 - 201 to 500
30%
 - 501 to 1,000
15%
 - 1,001 to 5,000
15%
 - More than 5,000
0%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
Healthcare. Finance. Technology.
15. Please list the company's top *association* clients.
American Society of Clinical Oncology • Direct Marketing Association • Emergency Nurses Association • Association of Clinical Oncologists
16. Please list the company's other (non-association) top clients.
The Walt Disney Company • Cisco Systems • Novartis • Genentech • Symantec • Parsons Brinckerhoff
17. Provide a URL for more information about the LMS.
<http://www.knowledgedirectweb.com>
18. Provide any other information or notes relevant to the "General LMS Information" section.
Unique features in the LMS allow creation of mobile learning using PowerPoint. Once a PowerPoint file is uploaded, the LMS automatically delivers either the Flash or HTML5 version of the module, based on the learner's browser and device.

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company’s usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

70

Typical

28

Simple

14

2. Briefly describe the implementation process.

The implementation process starts with a kick-off meeting and a detailed discussion of business rules (single sign-on, eCommerce system, student reporting, prerequisite courses, etc.).

Digitec then develops a detailed implementation plan with schedule and begins working with the client and third-parties to use their API or develop the web service integration with the AMS. There are regular weekly meetings.

During development, the platform goes through internal testing and is then released to our client for beta testing. Concurrently, Digitec conducts training sessions to assist the client in creating or importing courses. Once approved by the client, the platforms goes live and moves into support.

3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.
The LMS Product Manager is the Project Manager on all installations. The Project Manager assigns specific programming resources who will be part of the team for the implementation and on-going feature

development. As required, Digitec can also provide custom course development, with an in-house staff of graphic artists, instructional designers, programmers and audio and video production.

4. Please specify the location (by time zone) of company personnel involved in implementation.
-5 UTC
5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.

Typically, the association’s Director of Education will spear-head the effort. In addition, based on the integration effort, the client may assign an IT resource. During course creation/import, Digitec’s training staff typically works with the client’s Training Administrator.

6. Provide any other information or notes relevant to the “LMS Implementation” section.

The requirements analysis is the the key step in a successful deployment. Digitec demonstrates in detail all of the features and functions available within the base platform. Custom features can then be added to the platform, as part of a customization line item, if required to meet the business need. Developing a master plan and time table from these initial discussions creates a road map—which everyone understands and agrees to before implementation and set-up occurs. Digitec puts strong emphasis on collaboration and communication throughout the implementation process and beyond.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$17,400
 - 2,500
\$32,400
 - 5,000
\$47,400
 - 10,000
\$72,400
 - 25,000
\$97,400
 - Unlimited
—
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$42,200
 - 2,500
\$87,200
 - 5,000
\$132,200
 - 10,000
\$207,200
 - 25,000
\$282,200
 - Unlimited
—
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
Not applicable
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
Not applicable
5. Briefly describe the pricing model for the LMS.
There is a set-up fee, annual technical support, hosting, integration, custom development, and a user license fee.
6. Briefly describe the payment schedule.
Typical arrangements are 50% down and 50% upon go live. Should a client require variable terms, Digitec can arrange a flexible payment schedule.
7. Briefly describe pricing for additional services.
The prices listed in this survey include annual technical support to the client administrator, hosting of the LMS and licensing.
8. Provide any other information or notes relevant to the “Pricing” section.
A multi-year contract discount is available.

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Not applicable

2. Briefly describe the technical framework and code structure of the LMS.

The platform is built using Microsoft and Adobe-based software and database.

3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.

Digitec has integrated with a number of association management systems and databases and either uses the AMS API for integration or programs custom solutions utilizing either AMS provided web services or custom web services provided by the client. Data sharing can be achieved with custom on demand reporting offered as web services as well as the use of API, provided web services or direct access to the AMS database.

4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.

Knowledge Direct, deployed as a large scale application, maintains scalability through well known, industry best practices. Scaling beyond the infrastructure's current potential is as simple as inserting preconfigured server assets into the service cluster, with no-down-time resource up-scale. Server resource amplification projects are initiated at a predetermined student count or 35% server resource utilization. Bandwidth can be increased within four hours of a request beyond the current 100Mb connection.

5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.

Digitec hosts all implementations and includes 10GB of storage space and 40Gb of bandwidth per month in its standard hosting plan. Clients are able to monitor daily bandwidth. However, hardware or applications to limit client usage is not available.

6. Provide any other information or notes relevant to the "Technology" section.

Knowledge Direct utilizes best practices for application disaster recovery. Each deployment's content and customized features as well as the whole of the data storage exist in two

geographically separate locations. In addition, the production state of each deployment is maintained as functional within the staging environment allowing yet a third level of recovery it be needed. Knowledge Direct has enjoyed a 100 percent uptime for the past 46 months. However, Digitec guarantees an uptime of 99.99%. Response times vary depending on the weight of the course content, and the bandwidth of the eLearner. However, responses to the immediate upstream are guaranteed to be within 60 milliseconds. Knowledge Direct is hosted with a 100MB internet connection. The current infrastructure is rated to handle 7,500 simultaneous eLearners, scalable in blocks of either 5,000 additional simultaneous or 7,500 simultaneous. The Knowledge Direct hosting Platform hardware is all best-of-breed, utilizing shelf life spans twice those projected for production roll out. Every three years, production servers are retired to the development and staging server farms. Every year, the servers are physically cleaned to insure moving parts do not suffer wear due to environmental conditions. Every quarter servers are patched to manufacture recommended patching levels. Weekly security patches are applied if appropriate for these specialized servers. The servers are intensively reviewed daily for indication or conditions that may arise as dictated from a well-documented Preventative Maintenance schedule. The production environment is backed up continually to an offsite location. The Production database servers produce onsite database backups every half hour incrementally, with full database dumps every 24 hours. These backups are brought off site weekly and archived onto portable media. Once a month, these backups are permanently stored on other portable media in duplicate and the duplicate media is moved off-site to a safe box. This allows for three off site backups of database content, and a readily available duplicate. In the replication datacenter, the servers are continually backed up to servers within the development network onto portable media. All server backups are augmented with

Microsoft Windows Shadow Copy Service. Knowledge Direct servers are under close third party (Security Metrics) scrutiny for security compliance and audited quarterly. Additionally, Digitec conducts quarterly penetration studies of the hosting platforms bastion utilizing industry standard auditing applications and techniques. Lastly, Digitec maintains a PCI certification for credit card processing on production servers.

System Requirements

1. What are the technical requirements for an end user to access the LMS?

Knowledge Direct can be accessed by Mac and PC users, as well as mobile devices, including iPhone, iPad, Droid and Blackberry. The platform works with standard browsers such as Internet Explorer, Safari, Chrome and Firefox. We recommend a minimum 56k internet connection.

2. What are the technical requirements for an administrator to access the LMS?

Same requirements.

3. Is the end-user view of the LMS entirely browser-based? If no, specify what is not browser-based.

Yes

4. Is the administrator view of the LMS entirely browser-based? If no, specify what is not browser-based.

Yes

5. Provide any other information or notes relevant to the "System Requirements" section.

—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?

90%

2. Briefly describe the typical types of integration for the LMS.

Digitec integrates the Knowledge Direct platform with association management systems, content management systems, member databases, and external sites such as CME monitoring systems.

3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.

All implementations thus far have been completed using HTTP/S, Web Services, XML and SQL.

4. Briefly describe the process used for planning and implementing integration between the LMS and another system.

Digitec first works with the client to determine the business rules for how the LMS should function within their current environment.

Then, Digitec works with the client IT coordinator and any 3rd party vendor IT project manager, such as an AMS provider. From these requirements, an action plan and schedule for all parties involved is assembled. Integration documentation such as API tool kits are then shared between the parties. After reviewing and researching the resources, Digitec will propose an integration scope and once agreed upon, completes the integration, through iterations of testing until finalized and approved.

5. With which of the following Webinar systems has the LMS been integrated for a client implementation?

- Adobe Connect
- Elluminate ✓
- Genesys
- GoToWebinar ✓
- Microsoft Live Meeting
- ReadyTalk ✓
- WebEx ✓
- Completely custom (non-commercial) Webinar system
- The LMS has never been integrated with a Webinar system.
- Other (please specify) ✓

PictureTalk, Meeting Bridge

6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?

- Aptify (Aptify)
- Association Anywhere (ACGI) ✓
- ClearVantage (Euclid)
- CRM for Members (ProTech)

- iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap)
 - netFORUM (Avecetra) ✓
 - Office Manager (internet4associations)
 - Personify (TMA Resources) ✓
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS ✓
 - The LMS has never been integrated with an AMS.
 - Other (please specify)
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
- ACGI CMS Anywhere ✓
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla! ✓
 - Microsoft SharePoint Server ✓
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS.
 - Other (please specify) ✓
WordPress
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
No. Knowledge Direct includes its own integrated content authoring tool, which integrates with Microsoft PowerPoint. Knowledge Direct supports SCORM-conformant authoring tools, but does not integrate with any third party LCMS at this time.
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please

specify which e-commerce systems.

Yes. Custom Ecommerce system, iMIS ecommerce, CartSecure.

10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
Yes. Captivate, Articulate, RapidIntake, or any SCORM 1.2 compliant content.
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
No. Knowledge Direct includes a built-in assessment engine.
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
No. Knowledge Direct includes a built-in evaluation engine.
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
No
14. Provide any other information or notes relevant to the "Integration and Interoperability" section.
—

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?
- AICC
 - IMS Global Learning Consortium
 - Medbiquitous ✓
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004
 - Section 508 ✓
 - The LMS does not produce content that conforms to any of these guidelines or standards.
 - Other (please specify)

2. Can the LMS play content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous ✓
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
3. Provide any other information or notes relevant to the “Standards and Guidelines” section.

—

Hosting

1. Is the LMS available as a *company-hosted* solution?

Yes
2. How many LMS installations are hosted by the *company*?

34
3. Is the LMS available as a *client-hosted* solution?

No
4. How many LMS installations are hosted by the *client*?

Not applicable
5. How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
6. If the company’s LMS hosting is provided by a partner or partners, please list the name (s).

Not applicable
7. Briefly describe the company’s preferred or recommended hosting option.

We host all implementations of our LMS application.

8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.

Server downtime for maintenance is scheduled with each client. Server maintenance is systematic and follows military protocol for Preventative Servicing and Maintenance.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing ✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the “Hosting” section.

—

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?

Yes
2. Can end users specify their preferred language (which may differ from the default site language)?

Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?

Yes
4. Does the LMS support the ability to recommend courses based on end users’ prior activities, profile data, or role in the system?

Yes

- Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?

Yes

- Provide any other information or notes relevant to the "Personalization" section.

—

Interface Configuration

- Are the branding and look and feel for the end-user view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the end-user view are customized (e.g., handled entirely via cascading style sheets).

Yes. The administrator can brand the platform with banners and use the integrated palettes to specify the CSS-controlled colors within the portal.

- Are the branding and look and feel for the administrator view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the administrator view is

customized (e.g., handled entirely via cascading style sheets).

Yes. The administrator can brand the platform with banners and use the integrated palettes to specify the CSS-controlled colors within the portal.

- Are the navigation options for the end-user view of the LMS customizable? If yes, briefly describe how the navigation options for the end-user view are customized.

Yes. Knowledge Direct uses an admin console to enable site features to be activated or deactivated to specify what site controls the users have access to.

- Are the navigation options for the administrator view of the LMS customizable? If yes, briefly describe how the navigation options for the administrator view are customized.

Yes. Knowledge Direct uses an admin console to enable site features to be activated or deactivated to specify what site controls the administrators can access.



The learner experience in the Knowledge Direct platform

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
Yes. Users are able to minimize/maximize areas of the learner homepage. Administrators of the platform can also hide site content from learners.
6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.
No
7. Provide any other information or notes relevant to the “Interface Configuration” section.
—

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
No

5. Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes
6. In how many countries has the LMS been implemented for clients?
9
7. Please list the countries where the LMS has been implemented for a client.
Australia, Germany, Japan, England, Canada, China, Russia, Italy, France.
8. In how many languages has the LMS been implemented for clients?
9
9. Please list the languages in which the LMS has been implemented for a client.
English, Japanese, German, French, Dutch, Spanish, Italian, Russian, Korean.
10. How many language packs are available for the *end-user* view of the LMS?
—
11. Please list the languages for which a language pack is available for the *end-user* view.
—
12. How many language packs are available for the *administrator* view of the LMS?
—
13. Please list the languages for which a language pack is available for the *administrator* view.
—
14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
Knowledge Direct features a Language Administration Panel which allows the administrator to spawn a new version of the English Language for translation whenever it is needed. Additionally, these new translations contain a key to allow for language selection as the student comes to the LMS using a simple URL string.

Search and Catalogs

- How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs.
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
- What types of search are available to *end users* in the LMS?
 - Search within a single catalog
 - Search across multiple catalogs
 - Search general site content ✓
- What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for end users ✓
 - Search for other administrators
 - The LMS does not support search by administrators.
 - Other (please specify)
- Provide any other information or notes relevant to the “Search and Catalogs” section.

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Contact Support
Privacy Policy
System Check

Powered by Digitec
Knowledge
Direct

A Direct-to-WEB module, converted for Web-based and mobile delivery from PowerPoint

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed.
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)
3. Does the LMS provide the ability to author learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
Content authors can include rich media by utilizing the platform’s built-in content authoring tool.
5. Does the LMS support offline authoring of learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

Unavailable

If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor). *The Direct-to-Web authoring tool is included in a standard Knowledge Direct License. The tool enables a content author to upload a PowerPoint file directly into the LMS. The .PPT file is then automatically converted to Flash and HTML5 for mobile and web delivery. The built-in content authoring tool also includes the ability to create a variety of Flash activities and insert those into the module sequence, by completing simply drop-down form entries. Additionally, content authors can enhance module content through the use of YouTube videos and open response questions between slides of content. Open response questions include a WYSIWYG editor and can be part of an overarching document or worksheet which learners view and update throughout a module(s); resulting in a completed takeaway such as a business or marketing plan.*

The course maintenance menu on Knowledge Direct's administrative side

Knowledge DIRECT eLearning Portal

Logout Admin Home Page

Course Maintenance Menu

- Training Tasks
- Company Maintenance
- User Maintenance
- Course Maintenance
- Theme Maintenance

How Do I?

- [How to Create a Course](#)
- [How to Create a Module](#)
- [How to Assign a Module](#)
- [How to Create a Course Project Document](#)

Create

- [Create a Course](#)
- [Create a Module](#)
- [Create a Live Event](#)
- [Create a Module Assessment](#)
- [Assign Modules to Courses](#)
- [Assign Courses to Instructor](#)
- [Create Course Survey](#)
- [Create Course Project Document](#)
- [Assign Courses to Student Types](#)

Edit

- [Edit a Course](#)
- [Edit a Module](#)
- [Edit a Live Event](#)
- [Edit a Module Assessment](#)
- [Add/Edit a Course Discount Codes](#)
- [Edit Course Survey](#)
- [Edit Course Project Document](#)

Preview

- [Preview Student View](#)
- [Preview Module](#)

Enhance

- [Add/Edit Tools](#)
- [Add Activities to a Direct-to-WEB Module](#)
- [Add/Edit FAQs](#)
- [Add/Edit Discussion Topics](#)
- [Add/Edit RSS Feeds](#)
- [Message Center](#)

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Knowledge DIRECT eLearning Portal

Logout Admin Home Page

Course Maintenance Menu - Insert Module Activity

STEP 01 Select Module: Knowledge Direct Tutorial

Preview Module

STEP 02 Choose the screen where you want to insert the activity:

Slide Preview	Insert	Notes	Auto Advance
1		Getting to Know Knowledge Direct... -Intro music-	<input type="checkbox"/> On
2		Overview... Hi, I'm Kyle with Digitec Interactive. I'd love to show you around our platform. Knowledge Direct: This is where learners come to access their courses, discuss important topics with other learners, ac...	<input type="checkbox"/> On
3		The Training Menu - Profiles... Here at Digitec, we know you and your learners want an easy-to-use system that makes learning simple. With Knowledge Direct, learners can purchase courses through our integrated course catalog to add ...	<input type="checkbox"/> On
Select Activity Type:			
4		The Training Menu - Integrated Course Catalog... The integrated course catalog and eCommerce shopping cart make it easier than ever for learners to self-register for courses they wish to take. The "recommended courses" feature even "suggests" the co...	<input type="checkbox"/> On
5		The Training Menu - Learning Delivered Quickly and Easily... Busy training departments and small staffs need a quick and easy way to create new and engaging courses without the need for technical skills. The Knowledge Direct platform includes a simply powerful ...	<input type="checkbox"/> On

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Inserting activities into a Direct-to-WEB module upload to Knowledge Direct

- If yes, briefly describe how the LMS supports offline authoring.
The Direct-to-Web content authoring tool allows for offline authoring of interactive courses which are then uploaded to the LMS.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Check in/check out functionality
Unavailable
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Unavailable
 - Ability to monitor progress on tasks
Unavailable
 - Ability to add internal comments (viewable only by other administrators) to content
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
 7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 8. Can the LMS generate printer-friendly content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
—
 9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the digital rights management functions.
 10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
 - Browser-delivered online content ✓
 - Downloadable version
 - CD or DVD
 - HTML ✓
 - SWF ✓
 - PDF
 - Other (please specify)
 12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
 - Standard ✓

- Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party

- Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
Direct-to-Web (internal authoring tool)
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
—

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Administrative calendar for courses
Unavailable
 - End user calendar for viewing course options and schedules
Unavailable
 - Waitlisting
Unavailable
 - Personnel management (for scheduling instructors and facilitators)
Unavailable
 - Facility management (for scheduling rooms)
Unavailable
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Unavailable
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Unavailable

2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.

No

3. Provide any other information or notes relevant to the “In-person, Place-based Courses” section.

—

Webinars

1. Does the LMS provide integrated Webinar functionality?

- Standard ✓
- Semi-standard
- Completely custom
- Third-party
- Unavailable
- If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).

Knowledge Direct features a built-in webinar system. The LMS can also integrate with the client's preferred web conferencing system.

2. Briefly describe the company's preferred or recommended Webinar software.

Digitec integrates with a variety of webinar systems.

3. Provide any other information or notes relevant to the “Webinars” section.

—

Registration

1. How can end users be registered in the LMS?

- By self-registration ✓
- By registration code or key ✓
- By an administrator registering end users one by one ✓
- By an administrator performing a bulk upload ✓
- As the result of an e-commerce purchase ✓

- By self-registration with administrator approval ✓
- Other (please specify)

2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?

Yes

3. Does the LMS provide secure authentication for end users with a valid log-in and password?

Yes

4. Does the LMS provide self-serve password recovery help for end users?

Yes

5. Can administrators define new *end-user* roles with distinct rights and access in the site?

Yes

6. Can administrators define new *administrator* roles with distinct rights and access in the site?

No

7. Can the fields for end user profiles be added, edited, and deleted?

No

8. Is the content of profile fields updatable by end users if allowed by administrator?

Yes

9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?

No

10. Provide any other information or notes relevant to the “Registration” section.

—

Enrollment

1. How can end users be enrolled in courses in the LMS?

- By self-enrollment ✓
- By enrollment code or key ✓
- By an administrator enrolling end users one by one ✓

- By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes
 3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level ✓
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis ✓
 - Other (please specify)
 4. Can enrollments occur based on end user-specific criteria?
 - The end user's role in the system ✓
 - The end user's score on an assessment
 - The end user's completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify) ✓

Type of Student
 5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes
 6. Provide any other information or notes relevant to the "Enrollment" section.
—

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to

end users on successful completion of the course?

Yes

2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
Yes
3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)

5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
- By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify) ✓
Student must complete an assessment to receive credit.
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
- By the user claiming the credit
 - By the user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
- Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
Yes. Currently, the eTranscript feature within Knowledge Direct is being expanded to enable learners to submit non-course events for credit. Following administrator approval the activity will be added to the learners eTranscript and credit will be awarded.

14. How many clients use the LMS to manage continuing education or certification?
9
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE) ✓
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify)
16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.
—

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?
Yes
4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
 - Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment) ✓
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
 - Per question ✓
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option ✓
 - Based on which distracter the end user selected ✓
 - Per assessment ✓
 - Based on the end user’s overall performance on the assessment
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
Yes
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes

9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
Yes
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
No
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order) ✓
 - Hotspot questions (where users must select the correct area of a graphic) ✓
 - Drag-and-drop questions ✓
 - Other (please specify)
18. Provide any other information or notes relevant to the "Assessments" section.
—

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course
 - Other (please specify) ✓
The platform also supports custom evaluations for each module, as well as through the use of an external evaluation system.
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
Yes
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
No
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013)

- For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated)
 - The LMS does not provide for time limits for evaluations. ✓
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row) ✓
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields
 - Date fields
 - Time fields
 - Demographic information ✓
 - Other (please specify)
 11. Provide any other information or notes relevant to the "Evaluations" section.
—

Reporting

1. Does the LMS automatically record the date, time, and duration of end users' access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes

4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports ✓
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses)
 - Other (please specify) ✓
Digitec can also develop custom reports as needed for clients.

5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify) ✓
Reports can also be exported to Word and/or emailed.

6. How many standard, pre-configured reports are available in the LMS?

11
7. List and briefly describe the standard, pre-configured reports available in the LMS.

View Student Information, View/Download Student Reports, Student Course Status Report, Student Course Completion Data, Student Course Assessment Taken Chart, Student Course Access Chart, Quick Quiz Download Report, Student Registration Data Export, Student Course Survey Chart, Learner Pre-Assessment Gap Report, Learner Benchmark Report.
8. Briefly describe the process for creating ad-hoc reports in the LMS.

Knowledge Direct includes an Ad-Hoc report, enabling administrators to construct English style sentences to generate and save custom reports, such as "Who has not started this course by this date." Ad-Hoc report settings can be saved, enabling administrators to rerun the same report in the future. Report results can then be printed, saved or emailed. Additionally, a custom email message can accompany report results when emailed.
9. How many custom reports does the company typically develop for a client implementation of the LMS?

0

eLearner	Pre-Assessment	Date	Final Score	Date	Gains
Grosen, Shelley	0%	05/04/2012	100%	05/04/2012	100%
Hunt, Megan	Skipped	07/12/2012	Not Completed		
McDonnell, Mandi	27%	06/04/2012	82%	06/04/2012	55%
Pippin, Anna	38%	06/04/2012	73%	06/04/2012	37%
Pou, Valerie	45%	06/04/2012	64%	06/04/2012	19%
Wiltz, Zachary	9%	06/04/2012	55%	06/04/2012	46%

A learner report comparing pre-assessment scores to final assessment scores to determine learning gains

10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.

11. Provide any other information or notes relevant to the "Reporting" section.

The screenshot shows the Knowledge Direct eLearning Portal interface. At the top, there's a navigation bar with 'Logout' and 'Admin Home Page'. Below that, a breadcrumb trail reads 'Student Reporting Menu - Learner Benchmark Report'. The main content area has a sidebar with navigation links: Training Tasks, Company Maintenance, User Maintenance, Course Maintenance, and Theme Maintenance. The main area contains a 'Learner Benchmark Report' for 'eLearner: McDonnell, Mandy'. It features a table with the following data:

Course	Score	Passing Score	Average
A Getting Started Tutorial	82	60	73

Below the table is a 3D bar chart titled 'A Getting Started Tutorial' comparing Mandy's performance to benchmarks. The legend indicates: Learner Performance (orange), Average score (green), High score (blue), and Lowest passing score (grey). The Y-axis represents the score from 0 to 90. Mandy's score (82) is shown as an orange bar, the average score (60) as a green bar, the high score (90) as a blue bar, and the lowest passing score (73) as a grey bar.

A learner report comparing an individual learner's score to that of their peers

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?

- The LMS does not provide for multiple sites from a single client implementation.
- Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
- Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
- Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
- Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓

- Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
4
3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
500
4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.

One of our partners has 14,000 sites within their single Knowledge Direct LMS implementation.

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- End user-to-end user e-mail
Completely custom
 - End user-to-administrator e-mail
Standard

- Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Completely custom
 - Live chats (for multiple end users)
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Ability to organize end users in groups for collaborative work
Completely custom
 - Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard
 - Live voice-over-IP
Third-party
 - Virtual whiteboard
Third-party
 - Virtual presentations (e.g., PowerPoint-driven)
Third-party
 - Screencasting
Third-party
 - Application-sharing
Third-party
 - Ability to associate a wiki with a course
Completely custom
- Single-point Web camera capability
Third-party
 - Multiple-point Web camera capability
Third-party
 - Networking (e.g., ability for end users to connect with one another)
Semi-standard
 - Ability for each registered end user to have a blog
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party) ✓
Knowledge Direct integrates with web conferencing platforms that provide many of these options standard.
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
—

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Semi-standard
 - Handles transactions for physical items (e.g., books or CDs)
Semi-standard
 - Automatically handles payment by credit card (no manual intervention needed)
Standard

- Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles sales tax, including variations based on the state or region
Semi-standard
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Completely custom
 - Customizable e-mail message to users making the purchase
Completely custom
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Completely custom
 - Automatically maintains order status that can be checked by end user
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
 - Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net ✓
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint ✓
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments ✓
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify) ✓
We can customize to use any existing payment gateway, or handle the payment gateway service for our clients.

5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.

Yes. Verified quarterly by third part PCI certification service.

6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.

Digitec either provides clients with their eCommerce system or integrates with any existing shopping cart system the client is already using.

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?

Yes

8. Provide any other information or notes relevant to the "E-commerce" section.

—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Live telephone support for end users
Semi-standard
- Live telephone support for administrators
Standard
- E-mail support for end users
Semi-standard
- E-mail support for administrators
Standard
- Self-serve, searchable knowledge base for end users
Standard
- Self-serve, searchable knowledge base for administrators
Standard

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
End User Live Chat Support is Semi-Standard.
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Self-serve online training (e.g., tutorials) for end users
Completely custom
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Completely custom
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Completely custom
 - Scheduled in-person training at client offices for administrators
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
- Client administrators are the first line of help for end-user support unless they contract with Digitec for direct end-user support.*

4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Technical support is available to administrators, Mon-Fri 8:30-5:30 ET. Digitec's technical support team is also on-call on weekends and night.
5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Client administrators are the first line of help for end-user support unless they contract with Digitec for direct end-user support. If contracted for end user email support, support is available 24/7.
6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Technical support is available to administrators, Mon-Fri 8:30-5:30 ET. Digitec's technical support team is also on-call on weekends and night.
7. Briefly describe the company's typical ongoing communication with its LMS clients.
A member of Digitec's client support team is available to assist clients at all times. Personal service is Digitec's hallmark..
8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
Client administrators are responsible for communicating to their end users, unless there is an issue they have asked Digitec to investigate and have given the company permission to contact end users directly.
9. Provide any other information or notes relevant to the "Support and Training" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
2. What approximate percentage of your client implementations to date have involved custom programming work?
90%
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
Custom work involves all aspects of the LMS.
4. Briefly describe the process for used for planning and implementing custom programming work.
Digitec engages in detailed discussions with the client to flesh out the intent of the custom feature. Next, Digitec develops a Statement of Work explaining the feature or function and provides a fixed price. Once approved, work begins. Once the operable model is produced, it is released to the client during a conference call to ensure that all needs were met and testing by in-house staff is completed. Once the modification has cleared the internal Q/A, it is released to the client for their testing. Final approval is a clear to push to the production environment from the staging environment and the final sign-off occurs there.
5. Please specify the location (by time zone) of personnel involved in custom programming.
-5 UTC
6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.
-5 UTC

8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.

Digitec Interactive is a full-service eLearning company that not only offers its LMS, but also provides eLearning course development. Digitec assists clients from concept to completion and can develop a course from provided script storyboards, or develop specific media needed by a client for their production work.

EthosCE DLC Solutions

LMS Version: 6.3.3

Value proposition: *In an era of limited financial resources and increased regulations, EthosCE has been specifically designed to streamline and automate the delivery of continuing education in an intuitive, easy-to-use environment. The application is not loaded with irrelevant K-12 or post-secondary LMS features. This focus results in savings in time, money, and resources. And, with our flexible plans, EthosCE enables associations of any size to have an enterprise-level learning management system. Monthly subscription and open source versions are available.*

Top clients (associations): *American Academy of Family Physicians • American Academy of Allergy Asthma and Immunology • American College of Allergy Asthma and Immunology • American College of Emergency Physicians • American Society of Consultant Pharmacists • American Society of Anesthesiologists • National Association of Pediatric Nurse Practitioners • National Comprehensive Cancer Network • New Jersey Academy of Family Physicians*

Top clients (non-associations): *Duke University of School of Medicine • George Washington University School of Medicine • Memorial Sloan-Kettering Cancer Center • Perelman School of Medicine at the University of Pennsylvania • New York University Hospital System • University of North Carolina - Chapel Hill • ISMIE Mutual Insurance • United Healthcare • Pennsylvania Emergency Management Agency • Elsevier • University of Washington School of Nursing*

URL for more information about the LMS:

<http://www.ethosce.com>

Three-year pricing: \$81,000 to \$128,000

Hosting: *By company or by client*



Industry focus: health professions



DLC Solutions

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Unit 2 South
Philadelphia, PA 19107

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<http://www.dlc-solutions.com>





Our Take on EthosCE

Some Highlights

Built on both Drupal and Moodle, the popular open-source software systems, EthosCE marries Web site content management with learning management—because DLC Solutions believes the context for learning is as important as the learning content itself.

- The system offers a wizard that walks you through creating an activity (e.g., a course). Or, if you don't want to be stepped through the process, the expert mode puts everything on one page.
- Each activity can include a “commitment to change” instrument. An open-text field allows users to specify what they will do as a result of their learning. EthosCE can send automated reminders to prod users to follow through or to report on their action, including barriers to fulfilling their commitments. Administrators can review the commitments, create groupings of them, and then review barriers by those groupings.
- EthosCE uses activity sets to set up curricula and parent-and-child relationships among content. The system easily handles multiple and even either/or prerequisites.
- Each activity can be configured to trigger some or all of the many automated notifications in the system (e.g., reminders of start dates), and custom URLs for each activity support search engine optimization and usability.
- Administrators can set up access codes in EthosCE to work with live learning—so at a live event, a facilitator can provide a code for users to enter in the system to gain access to an online course that might contain, for example, an assessment or evaluation.
- Follow-up quizzes can be tied to activities in EthosCE, e.g., 30 days after an event. This offers an efficient way to see if learners are retaining and applying knowledge.
- EthosCE offers rich credit handling—the system can expire credit, can award nurses credit and doctors different credit for the same course, send users notification of expiration, and more. It can also simplify reporting credit to third parties, like boards of pharmacy or medicine. Some preconfigured credit report plug-ins are available to clients, and these could be adapted to fit other fields and industries.
- The reporting dashboard for activities is driven by charts (e.g., in-progress learners versus completions), and administrators can edit what's included simply by clicking chart.

While appropriate for the needs of many types of associations, DLC Solutions focuses on the continuing medical education market and has been very savvy in how it has built EthosCE to support the associations and the learners in that field.

General Company Information

1. When was the company founded?
2001
2. How many employees does the company currently have?
13
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
EthosCE Learning Management System. Web development using the Drupal content management system. Conference Webcasting and e-Learning Development.
5. Provide the company's contact information.
*109 S. 13th St
Unit 2 South
Philadelphia, PA 19107
USA
info@dlc-solutions.com
267-234-7400*
6. Provide the URL for the company's Web site.
http://www.dlc-solutions.com
7. Provide any other information or notes relevant to the "General Company Information" section.
DLC Solutions, LLC, is an award-winning Web and e-learning technology firm specializing in continuing education and training. Established in 2001, we partner with mid- to large-size associations, organizations, and businesses — such as the American Academy of Family Physicians, United Healthcare, Duke University School of Medicine, the National Comprehensive Cancer Network, and the University of Pennsylvania School of Medicine — to produce innovative Web and e-learning platforms for diverse populations. Our full-service firm provides complete end-to-end software development services including: dedicated technical project management, Website design and development, usability testing, software engineering, and hosting. We work closely with our clients to develop and implement strategic solutions that address their objectives and exceed

their expectations. Our flagship product, EthosCE LMS, is an enterprise-level content learning management system with built-in personalized learning profiles, administration tools, e-commerce, course delivery and assessments, outcomes measurement, and social media features. EthosCE has been specifically designed to streamline and automate the continuing education and training enterprise. The platform is available as both a Software-as-a-Service (SaaS) and open-source versions.

General LMS Information

1. What is the name of the LMS product?
EthosCE Learning Management System
2. Provide the product version described in this survey response.
6.3.3
3. When was the first version of the LMS initially released?
9/1/2009
4. Briefly describe the upgrade cycles for the LMS.
New product upgrades are released one to two times per year. Security patches and minor updates are released more frequently.
5. How many associations use this LMS?
13
6. How many organizations in total use this LMS, including associations?
22
7. How many end users are registered in the single largest client implementation hosted by the company?
41,000
8. How many end users are registered in the single largest client implementation hosted by the client?
73,000
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
170,000

10. Briefly describe the value proposition for this LMS as it applies to associations.
- In an era of limited financial resources and increased regulations, EthosCE has been specifically designed to streamline and automate the delivery of continuing education in an intuitive, easy-to-use environment. The application is not loaded with irrelevant K-12 or post-secondary LMS features. This focus results in savings in time, money, and resources. And, with our flexible plans, EthosCE enables associations of any size to have an enterprise-level learning management system. Monthly subscription and open source versions are available.*
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
- 499 or fewer registered end users
0%
 - 500 to 2,499 registered end users
0%
 - 2,500 to 4,999 registered end users
58%
 - 5,000 to 9,999 registered end users
8%
 - 10,000 to 24,999 registered end users
17%
 - 25,000 or more registered end users
17%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of individual members in the association?
- 1,000 or less
0%
 - 1,001 to 5,000
12%
 - 5,001 to 10,000
50%
 - 10,001 to 25,000
0%
 - 25,001 to 50,000
0%
 - 50,001 to 100,000
13%
 - More than 100,000
25%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of organizational members in the association?
- Less than 100
100%
 - 101 to 200
0%
 - 201 to 500
0%
 - 501 to 1,000
0%
 - 1,001 to 5,000
0%
 - More than 5,000
0%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
- EthosCE is a leading content learning management system for continuing medical education (CME) in the health professions. EthosCE LMS manages over 1.5 million CE credits for our clients include medical associations, academic medical centers, insurance plans, and healthcare systems. Our firm specializes in consolidating, automating and streamlining the user experience and administrative operations of the CME enterprise.*
15. Please list the company's top association clients.
- American Academy of Family Physicians • American Academy of Allergy Asthma and Immunology • American College of Allergy Asthma and Immunology • American College of Emergency Physicians • American Society of Consultant Pharmacists • American Society of Anesthesiologists • National Association of Pediatric Nurse Practitioners • National Comprehensive Cancer Network • New Jersey Academy of Family Physicians*

16. Please list the company's other (non-association) top clients.
- Duke University of School of Medicine • George Washington University School of Medicine • Memorial Sloan-Kettering Cancer Center • Perelman School of Medicine at the University of Pennsylvania • New York University Hospital System • University of North Carolina - Chapel Hill • ISMIE Mutual Insurance • United Healthcare • Pennsylvania Emergency Management Agency • Elsevier • University of Washington School of Nursing*
17. Provide a URL for more information about the LMS.
- <http://www.ethosce.com>*
18. Provide any other information or notes relevant to the "General LMS Information" section.
-

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)
- Complex
120
- Typical
60
- Simple
21
2. Briefly describe the implementation process.
- We have developed a process for deploying a standard implementation of the EthosCE LMS framework in a short period of time in*

an effort to get the LMS up and running as quickly as possible.

- As soon as the contract is signed, DLC Solutions assigns a project manager who serves as the point of contact and directs all communication and development.*
- The client then fills out an online form answering questions about how the LMS needs to be configured. Once the form is complete and reviewed and confirmed together by both parties, the configuration for standard EthosCE implementation begins.*
- While the implementation team works on the standard LMS implementation, we start the discovery for custom integrations by meeting with the key stakeholders. A scope document listing the project requirements and acceptance testing steps is created, reviewed and approved. The timeline for requirements gathering process usually takes no more than a few weeks.*
- Once the standard EthosCE site configuration is complete, we conduct on-site training sessions with the client. The sessions include hands-on exercises to ensure the team is comfortable using the LMS. The client spends several weeks conducting user acceptance testing and entering course materials. At the end of this process the client has a fully functioning installation of EthosCE LMS.*
- It is important to note that the site can be launched after completion of this phase while the development of custom functionality continues on a separate staging site. This process has been quite successful with our other clients when a launch deadline is critical. The custom development process is iterative and continues until all the approved requirements have been implemented. After each iteration, the client reviews the delivered customizations and can opt to push them to the production site at any time. The overall development timeline, including all custom work, depends on the number of phases needed to accomplish it and is usually determined by the final scope of work.*

3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.
An LMS implementation staff consists of senior partners, software engineers, technical project managers, quality assurance technicians, web developers, training specialists and help-desk support. In addition, we have established, long-term relationships with select freelancers to provide help on a contract basis based on expertise.
4. Please specify the location (by time zone) of company personnel involved in implementation.
-5 UTC
5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
We ask that an organization assign a single point of contact to serve as the project manager and interface with the organization's key personnel. Those personnel can consist of the LMS (or web site) manager, education staff responsible for creating courses, system administrators, marketing, finance and C-level leadership. The number of staff involved typically depends upon whether the LMS is self-hosted or not and the extent of customizations.
6. Provide any other information or notes relevant to the "LMS Implementation" section.
—

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S.

dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

- 500
\$33,000
 - 2,500
\$33,000
 - 5,000
\$33,000
 - 10,000
\$33,000
 - 25,000
\$33,000
 - Unlimited
\$33,000
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$81,000
 - 2,500
\$81,000
 - 5,000
\$81,000
 - 10,000
\$81,000
 - 25,000
\$81,000
 - Unlimited
\$81,000
 3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end

users for the first year. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

- 500
\$88,000
 - 2,500
\$88,000
 - 5,000
\$88,000
 - 10,000
\$88,000
 - 25,000
\$88,000
 - Unlimited
\$88,000
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$128,000
 - 2,500
\$128,000
 - 5,000
\$128,000
 - 10,000
\$128,000
 - 25,000
\$128,000
 - Unlimited
\$128,000
5. Briefly describe the pricing model for the LMS.
- *EthosCE PRO (SaaS): Full-featured LMS billed on a monthly subscription invoiced quarterly.*

- *EthosCE Enterprise (Open source): Fixed fee for standard deployment, support and hosting. "Hourly time and materials" rates for custom development, data migration, and integrations.*

6. Briefly describe the payment schedule.
- *EthosCE PRO (SaaS): Monthly subscription invoiced quarterly.*
 - *EthosCE Enterprise (Open source): 1/2 due at contract signing, remaining is invoiced on milestones of development. Support for 1 year is billed quarterly. Custom development is billed monthly.*
7. Briefly describe pricing for additional services.
- *Custom programming, integration and data migration are billed on an hourly rate and invoiced monthly.*
 - *Annual Support Contract is billed on a quarterly basis.*
8. Provide any other information or notes relevant to the "Pricing" section.
-

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
- EthosCE can be hosted on any recent Linux distribution running a stable kernel. MySQL 5+ is required.*
2. Briefly describe the technical framework and code structure of the LMS.
- EthosCE runs on a standard LAMP stack (Linux, Apache, MySQL, PHP), and is built on the Drupal framework using a number of contributed and custom modules. Code is split among "modules," which are plugins to add functionality. Modules use "hooks" to call and override shared functionality so that one client's custom requirements do not require a change to core functionality.*

3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.
EthosCE has as standard API which is available via SOAP, REST, or JSON and can expose all course, user, ecommerce and content for integration over a secure connection to an authenticated external system. In addition, many reports can be exported as flat files for migration, for example, user records, credit records, etc.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
EthosCE can be scaled using standard LAMP scaling techniques: caching, load balancing, etc. However, to date, performance has not been an issue for our association clients, even those with more than 100K members.
5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
There are no remarkable limitations of EthosCE.
6. Provide any other information or notes relevant to the "Technology" section.
—

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
Any device—such as a desktop computer, laptop, tablet, or phone—with a supported web browser. We support the two most recent stable releases of Chrome, Internet Explorer, Safari and Firefox.
2. What are the technical requirements for an *administrator* to access the LMS?
A desktop or laptop computer with a supported web browser.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes

5. Provide any other information or notes relevant to the "System Requirements" section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
65%
2. Briefly describe the typical types of integration for the LMS.
 - *Single sign-on: Integration with association management systems like iMIS, Association Anywhere or home-grown for unified user login and profile updates.*
 - *CRM Integration with systems like Microsoft Dynamics for user profile synchronization and management.*
 - *Integration with event management systems like Cvent to synchronize attendance, registrations and management of exhibitors and guest faculty*
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
SOAP, XML, JSON, REST.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
We have a standardized document that describes typical integration strategies. As a preparatory step, these documents are shared with the client. The project manager and product manager then meet with the client to elicit requirements, typically in an on-site work session or phone call. The requirements, technical architecture and user workflow are documented in writing and using flowcharts. Once all parties have agreed on an approach, the work is estimated by the engineering team and an estimate is delivered to the client. If accepted, work begins and both development teams work hand-in-hand until the work is ready for testing and then delivery. The work is presented at a client review session and handed over for user acceptance testing. Changes are made if necessary and then code is deployed to the production environment.

5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
- Adobe Connect
 - Elluminate
 - Genesys
 - GoToWebinar
 - Microsoft Live Meeting
 - ReadyTalk
 - WebEx
 - Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify) ✓
Talkpoint
6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
- Aptify (Aptify)
 - Association Anywhere (ACGI) ✓
 - ClearVantage (Euclid)
 - CRM for Members (ProTech)
 - iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap)
 - netFORUM (Avecetra) ✓
 - Office Manager (internet4associations)
 - Personify (TMA Resources)
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS ✓
 - The LMS has never been integrated with an AMS.
 - Other (please specify)
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
- ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal ✓
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS.
 - Other (please specify) ✓
Sitepoint
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
- Yes. Drupal is fully tested and integrated in our standard install.*
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
-
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
- No. EthosCE doesn't require content authoring tools to be tested for interoperability. We will support any tool that outputs content for web delivery, for example SCORM 1.2., Flash, HTML.*
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
- Yes. EthosCE has a built-in assessment tool.*
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
- Yes. EthosCE has a built-in evaluation tool.*
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
- Yes. EthosCE doesn't require content to be tested for interoperability. We will support any library that outputs content for delivery via the web, for example SCORM 1.2., Flash, HTML.*

14. Provide any other information or notes relevant to the “Integration and Interoperability” section.
-

Standards and Guidelines

- Does the LMS produce content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508 ✓
 - The LMS does not produce content that conforms to any of these guidelines or standards.
 - Other (please specify)
 - Can the LMS play content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
 - Provide any other information or notes relevant to the “Standards and Guidelines” section.
-

Hosting

- Is the LMS available as a *company-hosted* solution?
Yes
- How many LMS installations are hosted by the *company*?
9
- Is the LMS available as a *client-hosted* solution?
Yes

- How many LMS installations are hosted by the *client*?
13

- How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner ✓
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
- If the company’s LMS hosting is provided by a partner or partners, please list the name (s).
Rackspace is our recommended partner, however we will work with other enterprise-class hosting providers to find our clients the most appropriate hosting solution.
- Briefly describe the company’s preferred or recommended hosting option.
EthosCE LMS is hosted using a standard LAMP stack (Linux, Apache, MySQL, PHP) and requires no fee-based software to deploy and maintain. All popular linux distributions are supported.
- If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
For routine bug fixes delivered in response to a customer’s bug report, code releases are released to the customer for review and testing on Tuesdays. Code is deployed by the EthosCE staff to a testing environment. Customers are notified of the releases and can review any changes before code is pushed to production. Downtime is rare, however, but clients are notified if any downtime is necessary and the release time is scheduled to work best with each clients’ schedule. Server maintenance, when necessary, is scheduled in advance and typically happens during off hours if downtime is required.
- If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?

- Yes, routinely as part of standard pricing
✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the “Hosting” section.
-

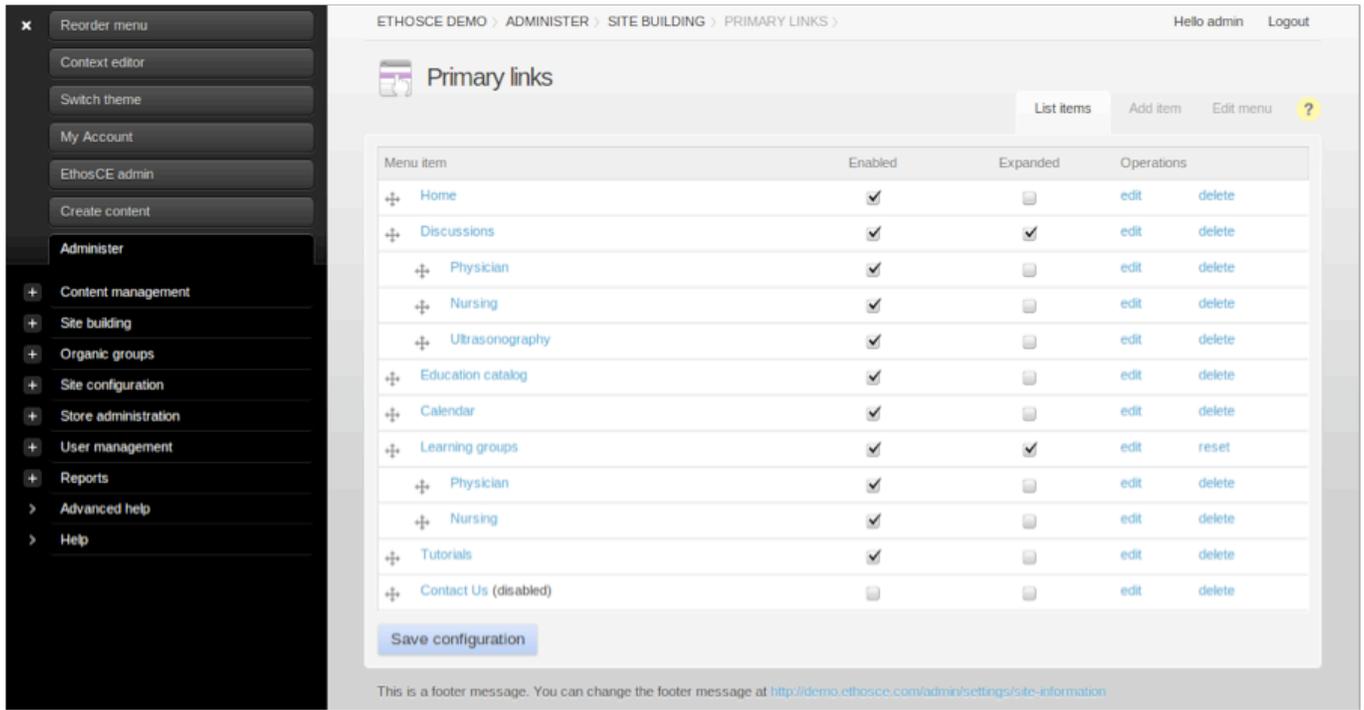
Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users’ prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
Yes
6. Provide any other information or notes relevant to the “Personalization” section.
EthosCE has built-in features for user profile management and transcripts. Users have options to view and update profile information through an intuitive user interface. The transcript section displays a user-specific list of activities that are in progress and completed along with credits awarded, if applicable. The personalized view also allows users to view and easily download PDFs of certificates anytime. For curricula, when

configured, users can see their status in required courses in a status tab on their transcript.

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
Yes. Branding the look and feel for the end-user are customizable and are done with cascading style sheets (CSS).
2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).
Yes. Branding the look and feel for the administrator are customizable and can be done with cascading style sheets (CSS).
3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.
Yes. EthosCE has a menu administration system where any authorized user can add, edit and delete menu links using a drag and drop list.
4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.
Yes. EthosCE has a menu administration system where where any authorized user can add, edit and delete menu links using a drag and drop list.
5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
Yes. EthosCE is built on the Drupal content management system (CMS) framework, which allows for creating, editing, and deleting content in the browser. For example an authorized user could edit an “About Us” page by navigating to



This screenshot shows the top navigation menu in an EthosCE site. Items can be dragged and dropped, deleted, or edited. Dropdowns appear indented. To add a new menu item, an administrator clicks the Add Item option.

the page and clicking “edit.” Many sophisticated options for managing content are available, such as workflow, revisioning, etc. Instructions for the learners can be customized per course. System copy, for example error messages, can be overridden using string replacements in an admin menu.

6. Is the content for the administrator view of the LMS customizable? If yes, briefly describe how the content for the administrator view is customized.

Yes. EthosCE is built on the Drupal content management system (CMS) framework, which allows for creating, editing, and deleting content in the browser. For example a user with permissions could edit an “About Us” page by navigating to the page and clicking “edit.” Many sophisticated options for managing content are available, such as workflow, revisioning, etc. System copy, for example error messages, can be

overridden using string replacements in an admin menu.

7. Provide any other information or notes relevant to the “Interface Configuration” section.

EthosCE also allows for using different themes per learning group, so that each learning group can have a different look and feel. Learning groups can contain courses as well as general content pages.

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the end-user view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

Yes

2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
Yes
5. Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes
6. In how many countries has the LMS been implemented for clients?
1
7. Please list the countries where the LMS has been implemented for a client.
United States.
8. In how many languages has the LMS been implemented for clients?
1
9. Please list the languages in which the LMS has been implemented for a client.
English.
10. How many language packs are available for the *end-user* view of the LMS?
0
11. Please list the languages for which a language pack is available for the *end-user* view.
Not applicable
12. How many language packs are available for the *administrator* view of the LMS?
0
13. Please list the languages for which a language pack is available for the

administrator view.

Not applicable

14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
EthosCE is built with two open source applications with full translation support and many language packs. However, to date, we have not been requested to localize EthosCE to any language other than US English.

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide).
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users ✓
 - The LMS does not support search by end users.
 - Other (please specify)
3. What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓

- Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify)
4. Provide any other information or notes relevant to the “Search and Catalogs” section.
-

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games
 - CD-ROM or DVD-based education
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify) ✓

Real-time webinars with external integration.
2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓

- The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)
3. Does the LMS provide the ability to author learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).

EthosCE provides the ability to create an HTML course using a full featured rich-text (WYSIWYG) editor. The editor includes a “Paste from Word” tool which will clean up the HTML coding created by Microsoft Word. The authoring tool also includes a text filter that will automatically embed or wrap a video, audio, or Flash file, etc. in a player. YouTube and other media links are recognized and embedded. Using the CMS functionality of the site, a course admin could also create an “external” course using the Drupal CMS and link the learner to it from the course learning object. The next version of EthosCE (6.4) will include a new Course module which will take advantage of the fully integrated Drupal content management system. Course admins will be able to author course content using any Course-enabled module, such as Book, which offers multi-page content authoring and

supports any number of embedded media, limited only by the configuration of the CMS. As an integrated learning object, the LMS will then be able to measure completion status of the learning object based on pages viewed or time spent, as well providing content access controls based on enrollment status. It should be noted that the Course module is open-source and already in use by other development groups. This will help ensure that a rich eco-system of Course-enabled modules are developed.

4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?

- Standard ✓
- Semi-standard
- Completely custom
- Third-party
- Unavailable
- If yes, briefly describe how rich media is typically integrated.

In the context of course objects there is a text filter that will automatically embed or wrap a video, audio, or Flash file, etc. in a player. YouTube and other media links are recognized and embedded.

5. Does the LMS support offline authoring of learning content?

- Standard
- Semi-standard
- Completely custom
- Third-party
- Unavailable ✓
- If yes, briefly describe how the LMS supports offline authoring.

6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Check in/check out functionality
Completely custom

- Ability to review content before it is published
Standard
- Ability to assign tasks to administrators
Semi-standard
- Ability to monitor progress on tasks
Semi-standard
- Ability to add internal comments (viewable only by other administrators) to content
Semi-standard
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

7. Does the LMS provide for versioning of learning objects and maintain archival versions?

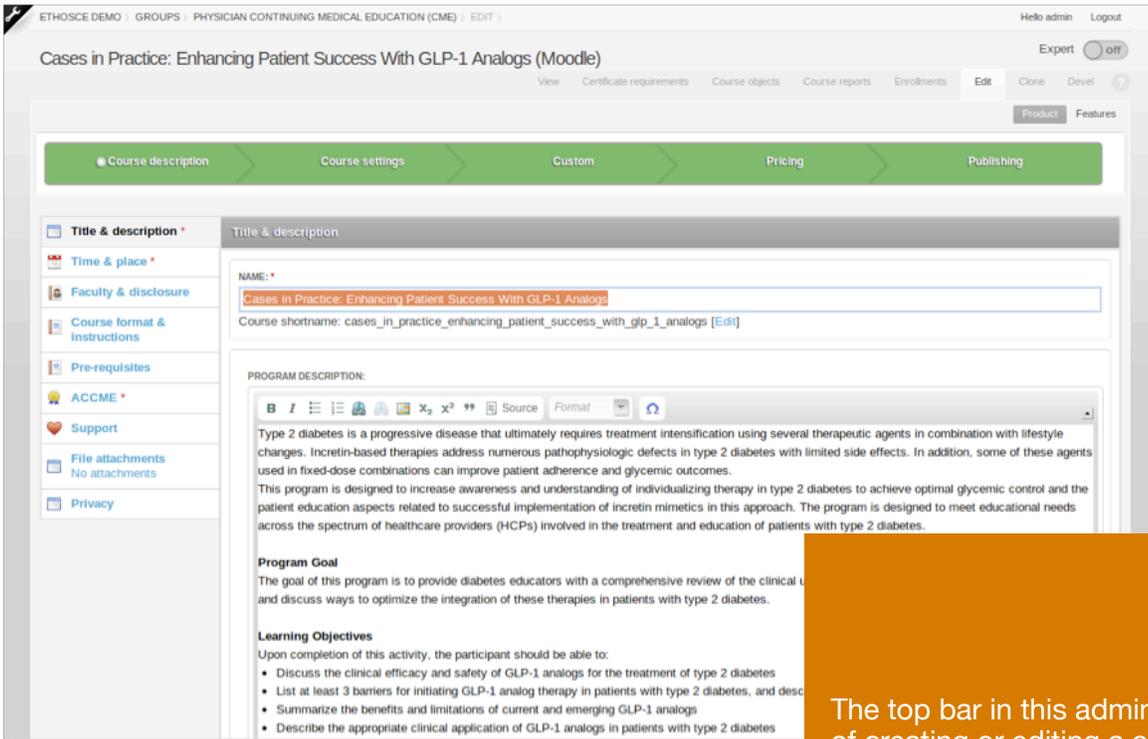
- Standard
- Semi-standard
- Completely custom ✓
- Third-party
- Unavailable

8. Can the LMS generate printer-friendly content?

- Standard ✓
- Semi-standard
- Completely custom
- Third-party
- Unavailable
- If yes, briefly describe how the printer-friendly option functions.
The CSS of the EthosCE site provides a print style which outputs content in a printer-friendly format. When a user prints the page, the styles are automatically invoked.

9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?

- Standard
- Semi-standard
- Completely custom
- Third-party ✓
- Unavailable
- If yes, briefly describe how the digital rights management functions.



The top bar in this administrator's view of creating or editing a course shows the status of the course creation wizard. In this screenshot, the course creation process is complete.

Below, the user workflow in a course is shown—the first object is completed, and the second object in progress. The last three learning objects cannot be accessed until the previous objects are complete.

Peripheral Vascular Disease (PVD)

Instructions

Each icon you see below is an element of this session. You must click each element sequentially to move on to the next element. You may go back and review any previously reviewed element. The only element that requires completion is the Post-Test, which you must pass with at least 80% accuracy to be eligible for CME credit for this session.

The syllabus and audio file (MP3) for this session are available for download in the "Watch the Video" element. Enjoy your session!



**Start:
Disclosures and
Disclaimers
Review**



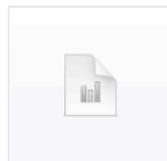
**Pre-Test
(optional)
Begin**



Watch the Video



**Post-Test
(required)**



**Finish: Course
Evaluation**

10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Browser-delivered online content ✓
 - Downloadable version
 - CD or DVD
 - HTML ✓
 - SWF
 - PDF
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
EthosCE does not recommend any specific authoring tool though most of our clients use tools from Adobe and Articulate.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
-

In-person, Place-based Courses

- Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Semi-standard
 - Personnel management (for scheduling instructors and facilitators)
Completely custom
 - Facility management (for scheduling rooms)
Completely custom
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Completely custom
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Standard
- Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
Yes. Many of our association customers use EthosCE as a part of their annual meeting, or for regional meetings or workshops. EthosCE can be used to allow learners to purchase registrations or enroll for free, for recording attendance, delivering assessments, and issuing credits based

on attendance. For larger meetings where logistical support is needed from a meeting management vendor, EthosCE can integrate with the meeting management vendor to receive registrations, attendance and then issue and track credits. Each session can be handled individually, or multiple sessions can be aggregated into a single activity. Aggregated sessions can then issue a single transcript with the listing of aggregated sessions in a single credit record.

- Provide any other information or notes relevant to the “In-person, Place-based Courses” section.
Registered learners can be emailed as a group for targeted communications. Instructor-led training can be accommodated by manual grading steps including pass/fail options.

Webinars

- Does the LMS provide integrated Webinar functionality?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
We have integrated with TalkPoint for passing users from the LMS to the webinar event.
- Briefly describe the company’s preferred or recommended Webinar software.
—
- Provide any other information or notes relevant to the “Webinars” section.
We can also integrate with other popular webcast providers such as GoToWebinar, WebEx, etc.

Registration

- How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓

- By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
 3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
 4. Does the LMS provide self-serve password recovery help for end users?
Yes
 5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
 6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
 7. Can the fields for end user profiles be added, edited, and deleted?
Yes
 8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
 9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
No
 10. Provide any other information or notes relevant to the “Registration” section.
—

Enrollment

1. How can end users be enrolled in courses in the LMS?

- By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify) ✓
Enrollment based on related courses, e.g., a curriculum. Enrollment based on integration with external system, e.g., event management, e-commerce, or CRM
Enrollment via API web services.
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes
 3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis ✓
 - Other (please specify)
 4. Can enrollments occur based on end user-specific criteria?
 - The end user’s role in the system ✓
 - The end user’s score on an assessment
 - The end user’s completion of prerequisites for a particular course
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify) ✓
Based on enrollments in related courses.
 5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes
 6. Provide any other information or notes relevant to the “Enrollment” section.
—

Managing Continuing Education and Certification

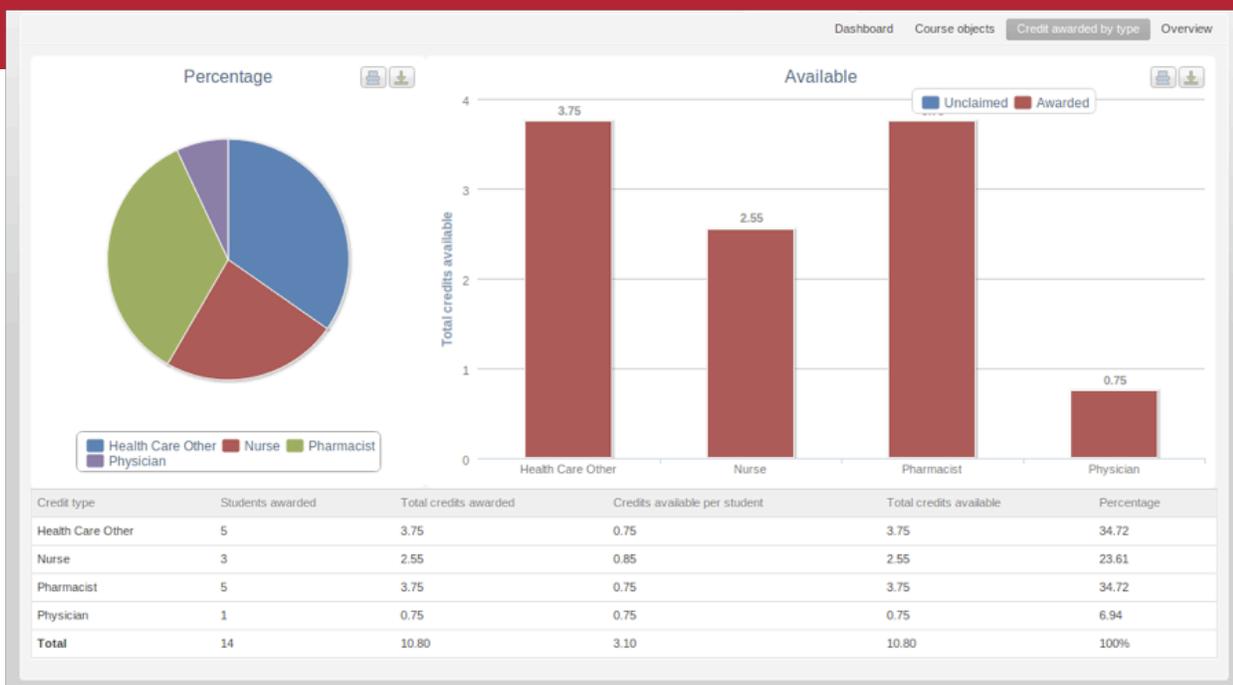
1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
Yes
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
Yes
3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
- By an administrator performing a bulk upload ✓
- By the end user claiming the credit and an administrator approving the claim
- The LMS does not support credit for this type of learning content.
- Other (please specify)
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify) ✓
Administrators can prevent credit claiming for users who have not met the requirements of the classroom-based course.
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
 - By the user claiming the credit ✓
 - By the user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify) ✓
Administrators can prevent credit claiming for users who have not met the requirements of the course.
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes

8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
 - Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline) ✓
 - No
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users) ✓
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?

Yes
12. Can end users view and print their own transcripts?

Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments

This report shows the percentage and count of credits claimed by users for each credit type. It also shows the credits available versus the credits claimed.



—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS’s portfolio functionality.

Yes. The system will track all courses in progress or completed. In addition, the client may elect to enable learners to track credits earned elsewhere, conferences attended, etc. The profile and transcript can also be integrated via customization to support the clients’ business requirements.

14. How many clients use the LMS to manage continuing education or certification?

25

15. What types of continuing education or certification do clients use the LMS to manage?

- Continuing education units (CE or CEU) ✓
- Continuing medical education (CME) ✓
- Continuing legal education (CLE)
- Continuing professional education (CPE) ✓
- Certificate of successful completion ✓
- Credit towards completing or maintaining a certification, licensure, or other credential ✓
- Credit towards a degree at a college or university
- No clients are using the LMS to manage continuing education or certification.
- Other (please specify)

16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.

—

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?

Yes

2. How does the LMS allow assessments to be used?

- Ability to offer an assessment as a standalone item (i.e., not associated with an online course)
- Ability to associate an assessment with an online course ✓
- Ability to associate multiple assessments with a single online course ✓
- Other (please specify)

3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?

Yes

4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?

- Yes, after an end user submits her answer to each question ✓
- Yes, after an end user completes the entire assessment ✓
- Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
- No
- Other (please specify)

5. How does the LMS provide for automatic feedback for assessments?

- Per question ✓
- Based on whether the end user answered the questions correctly ✓
- Per distracter, or answer option ✓
- Based on which distracter the end user selected ✓
- Per assessment ✓
- Based on the end user’s overall performance on the assessment ✓
- The LMS does not provide for automatic feedback for assessments.
- Other (please specify)

6. Can the LMS automatically display a summary screen to show the end user her assessment score?

Yes

7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
No
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
Yes
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
 - Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly. ✓
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
No
15. Does the LMS provide for automatic randomization of assessments?
 - By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
 - For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)

EthosCE provides a detailed item analysis on all assessments. The screenshot shows the different values available for each question in the system. The correct answer is in blue; all others are in red.

Item Analysis Table ?

Q#	Question text	Answer's text	partial credit	R. Counts	R.%	% Correct Facility	SD	Disc. Index	Disc. Coeff.
(132)	A elderly patient diagnosed with irritable bowel s : A elderly patient diagnosed with irritable bowel syndrome is given a starting dose of 10mg of dicyclomine (Bentylâ). For what kinds of side effects should she be monitored?	pulmonary edema	(0.00)	10/437	(2%)	65%	0.478	0.84	0.64
		tachycardia	(1.00)	291/437	(67%)				
		bloating	(0.00)	30/437	(7%)				
		diarrhea	(0.00)	23/437	(5%)				
		all of the above	(0.00)	66/437	(15%)				

- For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment)
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order) ✓
 - Hotspot questions (where users must select the correct area of a graphic) ✓
 - Drag-and-drop questions ✓
 - Other (please specify)
18. Provide any other information or notes relevant to the “Assessments” section.

Assessments can be created and managed through the administrators Web browser. In addition to standard assessment functionality, EthosCE's assessment tool enable educators to provide dynamic insights and reinforce key learning objectives through interactive feedback and digital media. Users can be provided with a comparison of their pre-test score with the post-test score in a chart with links to the questions.

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
No
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓

- The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row) ✓
 - Matrix of choices (multiple answers per row) ✓
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields ✓
 - Date fields ✓
 - Time fields ✓
 - Demographic information ✓
 - Other (please specify)
11. Provide any other information or notes relevant to the “Evaluations” section.
- Evaluations can be used to support live meetings and to conduct longitudinal studies of the learning experience and impact and to create ongoing, dynamic needs assessments that can be used to develop future education programs.*

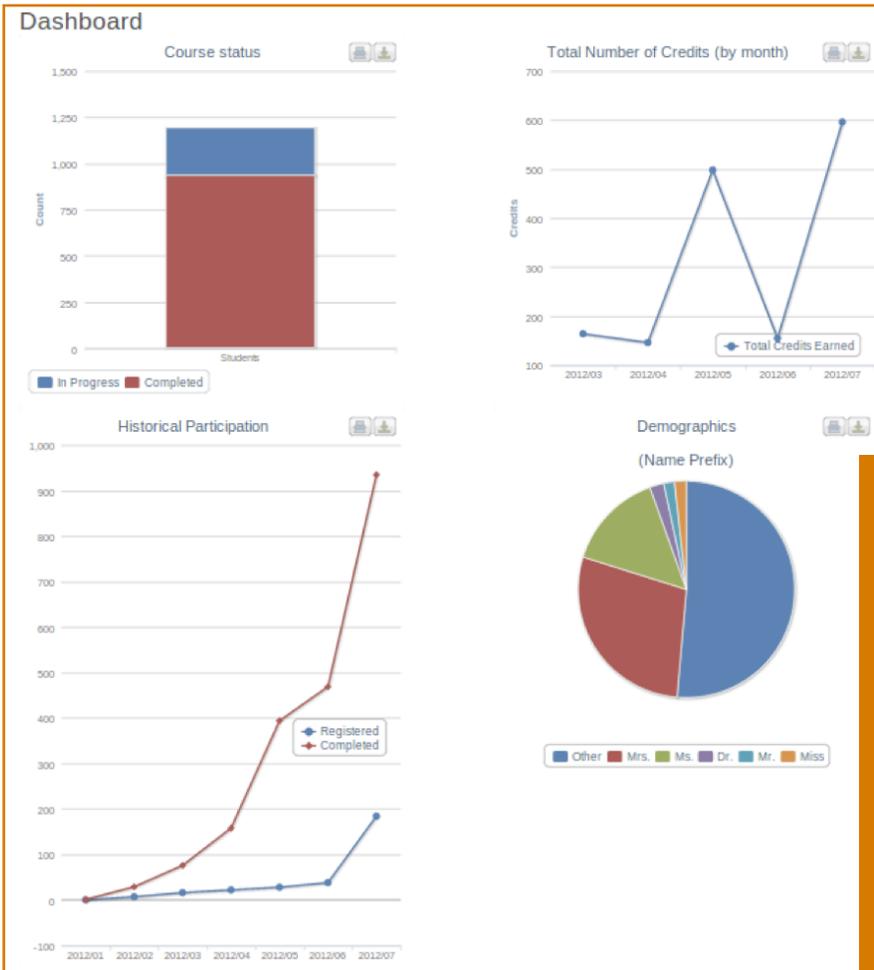
Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports ✓
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports ✓
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses) ✓
 - Other (please specify) ✓
We provide a built-in tool for creating ad-hoc reports for developers, not site administrators. This tool includes the ability to report on new fields, for example user profile fields. External reporting tools can also be used, but the client would be expected to know how to use those tools.
5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
26
7. List and briefly describe the standard, pre-configured reports available in the LMS.
 - *Global report dashboard with graphics showing number of users enrolled and completions over time, total number of user course registrations and completions, total number of credits awarded by month, user demographic by percentage of user.*
 - *Course report dashboard with graphics showing, count of enrollments and completions over time, assessment averages, user demographics percentages.*
 - *Site-wide course report with name of course user’s name, user type, id, start and end*

- dates, current stage in the course, number of credits awarded. Report can be searched and filtered.*
- *Overall course report with user's name, user type, id, start and end dates, current stage in the course, number of credits awarded. Report can be searched and filtered.*
 - *For each assessment (pre or post-test) a report that shows the user's first and last name, date started and completed, duration, total grade, pass or fail, scoring for each question in the assessment with links to the question*
 - *For each assessment an item analysis as explained above.*
 - *Comparison report allows items analysis comparison between two assessments.*
 - *Assessment export with full profile data*
 - *SCORM report to view learners SCORM tracking data.*
 - *Overall participation report provides a count on each type of credit awarded with percentage of total. Also a count of how many users started and how many completed.*
 - *For each survey there is a report for all responses with links to individual learner responses.*
 - *Survey export with full profile data.*
 - *Credit awarded by type.*
 - *For each course there is an enrollment report which provides sign up information for either live or enduring courses*
 - *ACCME PARS reports are optional for all courses*
 - *Commitment to change*
 - *Coupon usage*
 - *Customer sales*
 - *Product sales*
 - *Sales summary*
 - *Sales per year*
 - *Custom sales summary*
 - *Sales by month*
 - *Outbound email*
 - *Recent log entries*
8. Briefly describe the process for creating ad-hoc reports in the LMS.
If the client has developers on staff, they can create or duplicate a report and make modifications using the Views module. The report type is selected (user, node, etc) and then fields are added. Sorting and filtering can be added and complex relationships created. The report is given a system path, and permissions are set. The report can be output as a page, an attachment (CSV, etc), and the formatting can be list, table, etc. At any time a custom report is needed, DLC can provide assistance for an additional fee.
9. How many custom reports does the company typically develop for a client implementation of the LMS?
5
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
On average, clients request approximately 5 custom reports for their EthosCE LMS. These are most typically added after deployment once the client has fully explored the capabilities of the standard, pre-configured reports. The custom reports most commonly requested are to configure data in a certain format to be used in legacy systems or reports. The standard reports typically cover all CE reporting needs for new clients.
11. Provide any other information or notes relevant to the "Reporting" section.
—

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓



The global course report dashboard includes four reports: count of enrollments by status, number of credits awarded by month, number of registrations and completions by month, and a breakdown of a selected demographic field by percentages. All the data used to create the graphs is downloadable.

View course_report, displaying items of type Course report.

Export Clone View "Global course report" View "Global feed"

Clone display Remove display

Global course report Display the view as a page, with a URL and menu links.

Basic settings

- Machine Name: page_2
- Name: Global course report
- Comment: No comment
- Title: All courses
- Display status: Enabled
- Use pager: Paged, 50 items
- More link: No
- Access: access all course reports

Advanced settings

- Use AJAX: No
- Hide attachments in summary: No
- Use grouping: No
- Query settings: Settings
- Caching: None

Style settings

- Style: Table
- CSS class: None
- Theme: Information

Exposed form

- Exposed form in block: No
- Exposed form style: Basic

Page settings

- Path: admin/reports/co...
- Menu: Tab: All courses

Header

None defined

Footer

None defined

Empty text

Global: Text area Text area

Fields

(Course Node) Course: Nid Node ID
 (Course Node) Node: Title Course
 (Course User) User: Uid User ID
 (Content Profile) Content: First Name Default
 (Content Profile) Content: Last Name Default
 (Enrollment) Course enrolments: Start of enrolment Date Started
 Course report: Course date completed Date Completed
 Course report: Course status Status

Relationships

Course report: Course Node
 Course report: Course report user (Course User) Node: Content Profile
 Course report: Course enrollment

Arguments

(Course Node) Node: Nid

Sort criteria

None defined

Filters

(Course User) Realname: Name exposed
 Course report: Course date completed (Course report: Course date completed) Exposed Select Day

Click on an item to edit that item's details.

Save Cancel Live preview

The views report editor, shown above, is used by advanced users and developers to create reports.

- Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
- Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
- Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
- Each site in a single client implementation can have its own set of customized reports. ✓
- Other (please specify) ✓
EthosCE provides "learning groups," which can have their own URL, look and feel and features. This is provided out of the box and requires minimal configuration, aside from custom theming. Learning groups can be public or invitation only and can support group-contextual roles. E.g., a course administrator in one group cannot edit courses in a different group. In addition, EthosCE can provide a true multi-site environment, with a completely different set of configurations per client. This is how our hosted SaaS client sites are setup: One site, multiple, unique configurations. Our enterprise clients have this as an option, however using learning groups for multiple sites is much more common. In addition, true multi-site configuration can share selected database tables, for example, a user table, which would allow for the users to have a single account in all of the multi-site implementations.

2. How many clients have a multiple-site implementation of the LMS?
1
3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
2
4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.
—

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Semi-standard
 - End user-to-administrator e-mail
Semi-standard
 - Administrator-to-end user e-mail
Semi-standard
 - Broadcast messaging to all end users
Semi-standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Semi-standard
 - Live chats (for multiple end users)
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Semi-standard

- Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Semi-standard
 - Live voice-over-IP
Third-party
 - Virtual whiteboard
Third-party
 - Virtual presentations (e.g., PowerPoint-driven)
Third-party
 - Screencasting
Third-party
 - Application-sharing
Third-party
 - Ability to associate a wiki with a course
Completely custom
 - Single-point Web camera capability
Third-party
 - Multiple-point Web camera capability
Third-party
 - Networking (e.g., ability for end users to connect with one another)
Semi-standard
 - Ability for each registered end user to have a blog
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
EthosCE provides learning groups, a powerful collaborative learning platform for setting up “interest groups” which can be used to categorize

courses, news and discussion for targeted learners. EthosCE also allows custom branding options for group landing pages that help provide learners with an intuitive and engaging user experience. Also EthosCE is built upon the Drupal content management system which has an extensive collection of user-contributed modules. It's not uncommon to find a contributed module that can provide the framework for providing add-ons such as the communications and collaboration tools discussed above. If that is the case, integration into an EthosCE site is possible.

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Standard
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles sales tax, including variations based on the state or region
Semi-standard
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Semi-standard
 - Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Standard
 - Automatically maintains order status that can be checked by end user
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Semi-standard
- Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Purchasing of role, which allows might have reduced price/free access to multiple courses - standard. Coupons by price or percentage - standard. Bulk generation of single use coupon codes - standard. Limit coupon use by user, number of uses, product or product class - standard. Role-based pricing - standard. Product attribute based pricing - standard. Date-based coupons - standard. Maximum/minimum totals for applicable coupons - standard.
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout ✓
 - Authorize.Net ✓
 - BluePay ✓
 - CCAvenue ✓
 - CyberSource ✓
 - EBS ✓
 - EWay ✓
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint ✓
 - Moneris ✓
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments ✓
 - Protx ✓
 - QuickBooks Merchant Services ✓
 - StormPay
 - WorldPay ✓
 - Other (please specify) ✓
MunciPay.

5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.

Yes. When the payment gateway and server is configured correctly, EthosCE is PCI compliant.

6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.

EthosCE uses Ubercart for e-commerce and recommends one of three payment gateways: Authorize.net, Paypal or Google checkout. Ubercart is fully integrated with EthosCE.

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?

Yes

8. Provide any other information or notes relevant to the "E-commerce" section.

—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Live telephone support for end users

Third-party

- Live telephone support for administrators

Standard

- E-mail support for end users

Completely custom

- E-mail support for administrators

Standard

- Self-serve, searchable knowledge base for end users

Semi-standard

- Self-serve, searchable knowledge base for administrators

Standard

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Self-serve online training (e.g., tutorials) for end users

Completely custom

- Self-serve online training (e.g., tutorials) for administrators

Completely custom

- Scheduled online training (e.g., Webinars) for end users

Completely custom

- Scheduled online training (e.g., Webinars) for administrators

Semi-standard

- Scheduled in-person training at client offices for end users

Completely custom

- Scheduled in-person training at client offices for administrators

Standard

- Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users

Completely custom

- Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators

Standard

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

Each EthosCE implementation includes 2-days of on-site training for administrators and phone and web-based access to help desk - standard.

3. If applicable, briefly but specifically describe when telephone support for *end users* is available.

Third party, based on client's needs.

4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.

As a part of support contract, EthosCE provides unlimited telephone support to Designated Support Officers (administrators who have attended EthosCE training session(s)) Monday through Friday, 9 am-5 pm Eastern. Emergency support is available after hours at additional cost.

5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.

Third party, based on client's needs.

6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.

As a part of support contract, EthosCE provides unlimited e-mail support to Designated Support Officers (administrators who have attended EthosCE training session(s)) Monday through Friday, 9 am-5 pm Eastern. Emergency support is available after hours at additional cost.

7. Briefly describe the company's typical ongoing communication with its LMS clients.

EthosCE provides an easy-to-use bug tracking system to track, prioritize provide updates for support issues found internally and or by the LMS client. In addition, the support personnel also provide telephone and email communication as needed for updates on issues, deployments and maintenance tasks.

8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.

Completely custom.

9. Provide any other information or notes relevant to the "Support and Training" section.

EthosCE provides two full days of instructor-led training for course and site administrators. Advanced developer and feature-specific trainings are available on-site/online based upon clients' needs.

Custom Programming and Content Development

- Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
- What approximate percentage of your client implementations to date have involved custom programming work?
60%
- Briefly describe the typical custom programming services provided for client implementations of the LMS.
Integration with an association management system or other third-party system, including sign sign on on and shared user profiles. Custom reports are also common.
- Briefly describe the process for used for planning and implementing custom programming work.
A project manager schedules a series of discovery sessions and interviews the appropriate stakeholders, then documents the requirements. The client then reviews and approves the document, at which time it goes to the engineering team for an estimate. The estimate consists of a list of "user stories" and acceptance criteria. Once approved, the user stories are organized into one or more development "sprints." At the conclusion of the sprint, the custom functionality is then demoed for the client either in person or virtually. If accepted, the changes are then deployed for final user acceptance testing, and deployment. The client also receives a custom user manual addendum and training if necessary.
- Please specify the location (by time zone) of personnel involved in custom programming.
-5 UTC

6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.
8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.

-5 UTC

EthosCE customers are welcome to hire or use internal staff to do custom programming. We can provide training and technical documentation to support such endeavors.

EasyCampus Educadium



Industry focus: health care, financial services, education, tutoring, utilities, trade contractors, religion, trucking, consulting, government, HR

LMS Version: *EasyCampus 2012*

Value proposition: *Educadium is an innovative company that helps associations and nonprofits develop their knowledge, skills, and resources online in order to fulfill their mission. We enable associations to create and deliver mission-critical course training, lesson plans, and educational materials at lower cost with higher user satisfaction. With Educadium's convenient learning management platform, you can create a branded site to manage online training and educational programs; distribute policies and documents; track and certify compliance efforts; and communicate better with important stakeholders and the community. Educadium minimizes IT and administrative overhead and offers new ecommerce opportunities for building revenue. Organizations can meet productivity and risk management goals related to professional development, facilities management, HR, and safety, Educadium is a responsive, service-oriented partner that supports nonprofit leaders and associations with affordable, web-based products and customized programs that address their unique needs.*

Top clients (associations): *American Dietetic Association • Western Electrical Contractors Association • Independent Electrical Contractors • American Wine Society • Texas Youth Football Association • NW Public Power Association • Escrow Association of Washington • Washington Onsite Sewage Association • National Association of Certified Mediators*

Top clients (non-associations): *Jamaica Hospital/MediSYs • Chemeketa College • Northwest Renewable Energy Institute • InCharge Debt Solutions • Summer Advantage • Southpoint Community Church • Railroad Retirement Board*

URL for more information about the LMS:

<http://www.educadium.com/products.html>

Three-year pricing: \$10,628 for 500 registered users

Hosting: *By company only*



Educadium

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EasyCampus

Our Take on EasyCampus Some Highlights



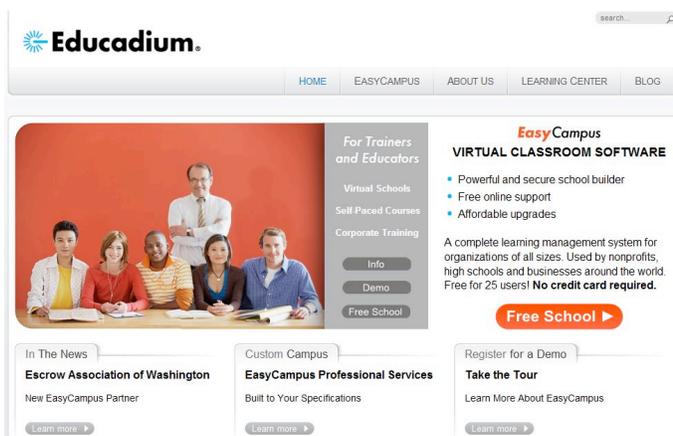
As its product's name suggests, Educadium has focused on making EasyCampus, based on the popular open-source LMS Moodle, easy to deploy and manage. In literally minutes, you set up an EasyCampus site—and you don't have to be a paying customer. EasyCampus Express, a self-serve option, is free for up to 25 registered users. While EasyCampus Express doesn't include all the features and branding capabilities of the paid subscription packages, it lets you vet the system with hands-on experience.

- Course wizards help organizations build their EasyCampus courses, whether self-paced, instructor-led, or hybrid (and the value of hybrid is something Educadium staff say they stress with their clients).
- Educadium strives to be transparent about pricing. The various subscriptions and add-ons (like enhanced support and reporting) are described and priced on its Web site, and you can purchase them via credit card or PayPal.
- Educadium offers an array of standard online support and resources. Professional services—including, for example, help with developing courses—round out the options for organizations using EasyCampus.
- For a transaction fee, CampusPay allows organizations to charge for courses through Educadium, without the need for their own merchant account.
- Educadium staff report that most EasyCampus clients use the system for continuing education and certification purposes. Certificates can be made available based on relatively complex criteria (e.g., a user scores at least 80 percent on five quizzes in a course, a user scores at least 80 percent on a specific quiz, or a user spends at least 600 minutes in a course). EasyCampus keeps a record of issued certificates, each with a unique code.
- EasyCampus is moving aggressively to mobile and offers an HTML5 video player.
- A Competencies tracker feature allows organizations to set up competencies (and related sources and references) and then tie assessment questions to those competencies—so as feedback learners can be directed to the appropriate competency and related references for clarification. (The tracker is not listed on the company's site, so be sure to ask about it if this is a capability you need.)

When LMSes first evolved, they focused on large organizations, as they were the ones that could justify the time and expense of implementing such a system. But technology has matured, and costs and implementation timelines have shrunk. In today's market, there are options for small and mid-sized organizations, and EasyCampus is one such option—although its low prices and ease of set-up can appeal to larger organizations too. But Todd Harris, Educadium's president insists that selecting the right learning technologies shouldn't just be about prices and feature; while those are important so is the relationship and the chemistry between the company and its clients.

General Company Information

- When was the company founded?
2008
 - How many employees does the company currently have?
12
 - Is the company privately or publicly held?
Private
 - Briefly describe the top three products or services the company offers.
 - EasyCampus LMS, a full-featured yet affordable cloud-hosted learning management and virtual classroom platform for nonprofits, associations, and trainers.*
 - Standard, Preferred, and Premium packages are available on monthly or annual subscription plans. Pricing starts at \$39/month for up to 500 registered users, and large programs with more than 5,000 end-users are accommodated.*
 - Package features and subscription pricing are described at: www.educadium.com/products.html*
 - Advanced website and project management products, such as EasyCampus Enhanced and live virtual classroom products, are also available in order to create a seamless CMS/LMS/e-commerce experience.*
 - EasyCampus LMS Add-Ons, optional products and subscription services*
 - These Add-Ons include customized URLs, Google Apps integration, competency tracking, attendance modules, advanced survey tools, and enhanced support.*
- Several popular Add-Ons, such as course bundling and conditional activities, are included in the Preferred and Premium subscription packages at no additional charge. Educadium's live Conference whiteboarding tool is now standard with the Premium subscription package.*
 - For more information, visit: www.educadium.com/easycampus/add-ons.html or contact info@educadium.com*
 - Professional Services, learning management consulting, and administration.*
 - Educadium's LMS experts and instructional designers work with associations and learning organizations to create quality self-paced and instructor-led course materials from existing training and curricula. On-going maintenance and https security plans are also available. Educadium can create and implement strategic plans to help training organizations and associations of all sizes migrate from on-ground to online learning.*
 - Educadium developers can also assist with data integration projects related to website single sign-on, student information systems, AMS requirements, and other third-party databases.*
 - Professional services and training can be purchased by the hour on Educadium.com or through a customized proposal.*



- *E-commerce services.*
 - ▶ *Educadium offers an optional opt-in service for subscribers called CampusPay, which facilitates administration and revenue collection (credit cards or PayPal) of tuition-based courses. There are no set-up fees, and Educadium handles all bank fees and accounting, providing customers with a monthly payment for all course revenue generated less a small transaction fee.*
 - ▶ *For more information, visit: www.educadium.com/campuspay.html*
 - ▶ *Other options include a Custom Tuition Payment Add-On, which offers real-time tuition payments without the need for a merchant account. Educadium can also provide integration assistance with various shopping-cart platforms as a Professional Service.*
 - *Course and Site Promotion.*
 - ▶ *Educadium regularly promotes featured EasyCampus owners and their courses.*
 - ▶ *EasyCampus Support is a free e-learning training site, where Educadium step guides, videos and online training courses are available for subscribers.*
5. **Provide the company's contact information.**
*10940 S.W. Barnes Rd. No. 126
 Portland, OR 97225
 USA
info@educadium.com
 1-888-558-1683*
 6. **Provide the URL for the company's Web site.**
www.educadium.com
 7. **Provide any other information or notes relevant to the "General Company Information" section.**
Educadium develops EasyCampus, the affordable cloud-hosted learning platform comparable to Moodle and used by prominent associations and learning organizations around the world. In minutes, trainers, educators, and nonprofits can create scalable training programs, online schools, and virtual classrooms. The full-featured Educadium LMS works for self-paced courses,

Flash videos, SCORM-authored content, quizzes, and certificates. The Express service is free for up to 25 users. Subscriptions start at \$39/month for 500 users, and large-scale packages are accommodated. Custom branding, e-commerce for course tuition, and professional services are available. Online support is free. A third-generation family company, Oregon-based Educadium is a member of TRUSTe and the FCC's E-rate program. More information and client testimonials are available at www.educadium.com.

General LMS Information

1. **What is the name of the LMS product?**
EasyCampus Learning Management Platform
2. **Provide the product version described in this survey response.**
EasyCampus 2012
3. **When was the first version of the LMS initially released?**
06/01/2009
4. **Briefly describe the upgrade cycles for the LMS.**
Regular bug fixes and minor improvements occur monthly or as needed. Major upgrades and feature improvements occur every six months on average.
5. **How many associations use this LMS?**
 —
6. **How many organizations in total use this LMS, including associations?**
 —
7. **How many end users are registered in the single largest client implementation hosted by the company?**
 —
8. **How many end users are registered in the single largest client implementation hosted by the client?**
Not applicable
9. **How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?**
 —

10. Briefly describe the value proposition for this LMS as it applies to associations.

Educadium is an innovative company that helps associations and nonprofits develop their knowledge, skills, and resources online in order to fulfill their mission. We enable associations to create and deliver mission-critical course training, lesson plans, and educational materials at lower cost with higher user satisfaction. With Educadium's convenient learning management platform, you can create a branded site to manage online training and educational programs; distribute policies and documents; track and certify compliance efforts; and communicate better with important stakeholders and the community. Educadium minimizes IT and administrative overhead and offers new ecommerce opportunities for building revenue. Organizations can meet productivity and risk management goals related to professional development, facilities management, HR, and safety. Educadium is a responsive, service-oriented partner that supports nonprofit leaders and associations with affordable, web-based products and customized programs that address their unique needs.

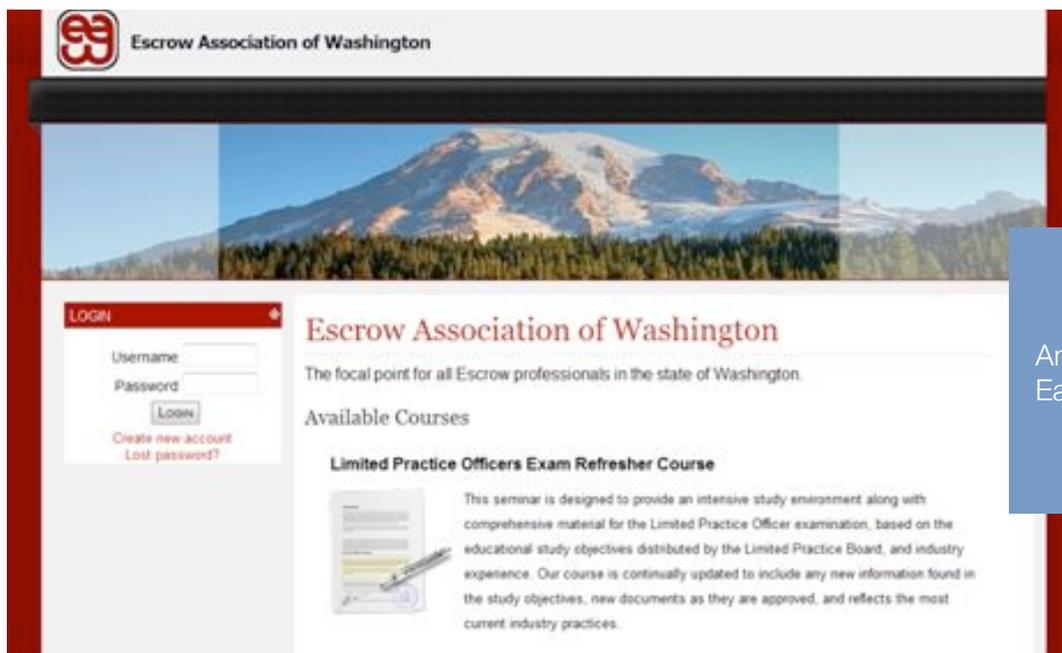
11. What approximate percentage of your client implementations fall into the following size

categories based on registered end users?

-
- 499 or fewer registered end users
- 500 to 2,499 registered end users
- 2,500 to 4,999 registered end users
- 5,000 to 9,999 registered end users
- 10,000 to 24,999 registered end user
- 25,000 or more registered end users

12. What approximate percentage of your association implementations fall into the following size categories based on the number of individual members in the association?

- 1,000 or less
5%
- 1,001 to 5,000
30%
- 5,001 to 10,000
25%
- 10,001 to 25,000
25%
- 25,001 to 50,000
10%
- 50,001 to 100,000
5%
- More than 100,000
0%



An association's EasyCampus site

13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?

-
- Less than 100
- 101 to 200
- 201 to 500
- 501 to 1,000
- 1,001 to 5,000
- More than 5,000

14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.

Nonprofits, associations, health care, financial services, education, tutoring, utilities, trade contractors, religion, trucking, consulting, government, HR.

15. Please list the company's top *association* clients.

American Dietetic Association • Western Electrical Contractors Association • Independent Electrical Contractors • American Wine Society • Texas Youth Football Association • NW Public Power Association • Escrow Association of Washington • Washington Onsite Sewage Association • National Association of Certified Mediators

16. Please list the company's other (non-association) top clients.

Jamaica Hospital/MediSYS • Chemeketa College • Northwest Renewable Energy Institute • InCharge Debt Solutions • Summer Advantage • Southpoint Community Church • Railroad Retirement Board

17. Provide a URL for more information about the LMS.

<http://www.educadium.com/products.html>

18. Provide any other information or notes relevant to the "General LMS Information" section.

A demo site with a student view is available at:

- *<http://campus.educadium.com/sunset/>*
- *Username: student*
- *Password: student*

Self-paced courses and bundles with sample branding are available for view inside the EasyCampus demonstration site. A free trial site for up to 25 users and five courses can be created by clicking "Free School" on the Educadium home page.

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

60

Typical

30

Simple

1

2. Briefly describe the implementation process. *Following contract signing, the client is given an Educadium project manager, who will schedule a kickoff meeting to review the set up and any custom elements, such as theming, course layout, or engineering. The client is given a project management portal to track implementation progress and sign offs. Additional webinar training, as part of a subscription package or special services, is also delivered in a timely manner.*
3. Briefly describe the *company* personnel (by role) involved in the LMS implementation. *Depending on the requirements, client implementations involve a client manager, project manager, professional services manager, and support engineers.*

4. Please specify the location (by time zone) of company personnel involved in implementation.

—

5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.

Decision maker for formal sign offs; project management for business requirements and coordination; various production and engineering personnel if required or supplied by the client. Educadium works with organizations and associations of all sizes and can accommodate client personnel with varied technical backgrounds.

6. Provide any other information or notes relevant to the “LMS Implementation” section.

Educadium offers a 60-day limited warranty on all Professional Services and integration projects. We stand behind our work.

• 5,000

—

• 10,000

—

• 25,000

—

• Unlimited

—

2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

• 500

\$10,628

• 2,500

—

• 5,000

—

• 10,000

—

• 25,000

—

• Unlimited

—

3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

• 500

\$6,814

• 2,500

—

company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

5. Briefly describe the pricing model for the LMS.

Educadium has designed a technologically advanced, low-cost SaaS model, which translates into greater value and lower pricing for associations. Subscriptions can be purchased monthly or annually and correspond to LMS features, total number of registered users and storage used. Add-ons, enhanced support, and professional services are available for all subscribers. A free version, which can be upgraded, is available for up to 25 users.

6. Briefly describe the payment schedule.

EasyCampus subscriptions are prepaid. Monthly and annual subscription payments via credit card or PayPal are available. For qualified organizations, manual invoicing (check or credit cards) is available for annual accounts. Annual hosting subscription discounts are available. For orders of more than \$5000, 50% of the contract value for custom Professional Services is due upon signing. EasyCampus Add-On payments are due at signing or at website purchase.

7. Briefly describe pricing for additional services.

Educadium charges \$150/hour for software engineering and Professional Services (2012). Discounts are available for lower-level production work, training, and selected projects. Additional services and pricing are found on the EasyCampus Add-On store: <http://www.educadium.com/easycampus/add-ons.html>. Services include:

- *Enhanced voice support subscriptions*
- *Enhanced hosting subscriptions*
- *Professional services (by the hour)*
- *Custom URL services*
- *Course production (SCORM, Flash)*
- *Other optional learning modules*
- *Training*

8. Provide any other information or notes relevant to the “Pricing” section.

Pricing estimates assume a Premium package subscription with initial theming and course template design. All LMS subscriptions and software are hosted by Educadium. For updated pricing for more than 500 users, please visit www.educadium.com or email info@educadium.com.

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?

NA. Educadium’s LMS is a cloud-hosted platform managed by Educadium.

2. Briefly describe the technical framework and code structure of the LMS.

Educadium’s EasyCampus LMS is a globally available, multi-tenant SaaS platform. It uses a LAMP stack that incorporates Moodle, third-party and custom code. Hosting is through a custom cloud configuration offered through the Amazon EC2 Cloud and CDN infrastructure. Worldwide DNS services are provided by Zerigo. All volumes are backed up daily and security best practices have been implemented. More information is available upon request.

3. Briefly describe the LMS’s ability to share data for the purposes of migration and integration.

Educadium can assist with content migration and custom integrations, including single sign-ons. More information is available upon request.

4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.

EasyCampus has been engineered for large-scale, global instances in excess of 50,000 registered users per campus. There are no minimum system loads. Backups occur on a daily basis. More information is available upon request.

5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
In 2012, each subscription package includes storage limits: Standard (10GB/month); Preferred (25GB/month); and Premium (50GB/month). Additional storage can be purchased a la carte: 10GB/month for 12 months for \$395. Bandwidth is included but must conform to reasonable usage per Educadium's Terms of Use (site total not to exceed 250MB/user/month). High-bandwidth and streaming options are available upon request, and Educadium welcomes video-intensive customers.
6. Provide any other information or notes relevant to the "Technology" section.
More information about EasyCampus technology and cloud-hosted infrastructure is available on the Educadium website: www.educadium.com/easycampus/infrastructure.html.

System Requirements

1. What are the technical requirements for an end user to access the LMS?
The Educadium EasyCampus LMS platform is a hosted, browser-based service and requires no special software. For browsers, we recommend Firefox 3.5+ or IE 8, or 9. We no longer support IE 6. Though not optimized for other browsers, the EasyCampus LMS will also work with Chrome and Safari. There may be minor visual differences among different browsers, but it shouldn't affect performance or functionality. Tablet and mobile access (e.g., iPad) are available but performance may vary depending on device. For best results, users are encouraged to access the EasyCampus LMS through a high-speed broadband service with adequate audio and video capabilities, including Flash 9+ or HTML 5. Educadium will perform well on either a Mac or Windows-based computer.
2. What are the technical requirements for an administrator to access the LMS?
The technical requirements for an EasyCampus administrator and end user are the same.

3. Is the end-user view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the administrator view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the "System Requirements" section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
—
2. Briefly describe the typical types of integration for the LMS.
Single sign-on for registration and course enrollment; e-commerce and reporting projects; website and LMS integration.
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
Educadium EasyCampus middleware (a SOAP Web services interface) is available for standard and non-standard data integration projects. An updated API will also be available in late 2012.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
Based on initial requirements, Educadium engineers work with client engineers to determine the log-in and user identification sequence between the various databases. At all times, we work to ensure security between the two sites for the duration of the user session.
5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect ✓
 - Elluminate
 - Genesys
 - GoToWebinar ✓

- Microsoft Live Meeting
 - ReadyTalk
 - WebEx ✓
 - Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify) ✓
Big Blue Button, WiziQ.
6. With which of the following association management systems (AMSES) has the LMS been integrated for a client implementation?
- Aptify (Aptify)
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid) ✓
 - CRM for Members (ProTech)
 - iMIS (Advanced Systems International)
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap)
 - netFORUM (Avecetra)
 - Office Manager (internet4associations)
 - Personify (TMA Resources)
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS ✓
 - The LMS has never been integrated with an AMS.
 - Other (please specify) ✓
AMS integration projects available upon request.
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
- ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal ✓
 - Ektron
 - Joomla! ✓
 - Microsoft SharePoint Server
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS ✓
 - The LMS has never been integrated with a CMS.
 - Other (please specify) ✓
Business Catalyst.
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
-
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
- Yes. —*
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
- Yes. Articulate, Raptivity, iSpring, and most other of the most popular course-authoring tools.*
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
- Yes. ExamView.*
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
- Yes. Educadium offers proprietary evaluation, assessment, and survey tools and can integrate other tools upon request.*
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
- Yes. —*
14. Provide any other information or notes relevant to the “Integration and Interoperability” section.
-

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium ✓
 - Medbiquitous
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - Section 508 ✓
 - The LMS does not produce content that conforms to any of these guidelines or standards.
 - Other (please specify)
2. Can the LMS play content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium ✓
 - Medbiquitous
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
3. Provide any other information or notes relevant to the “Standards and Guidelines” section.

EasyCampus conforms to most popular standards and guidelines.

Hosting

1. Is the LMS available as a *company-hosted* solution?

Yes
2. How many LMS installations are hosted by the *company*?

—
3. Is the LMS available as a *client-hosted* solution?

No
4. How many LMS installations are hosted by the *client*?

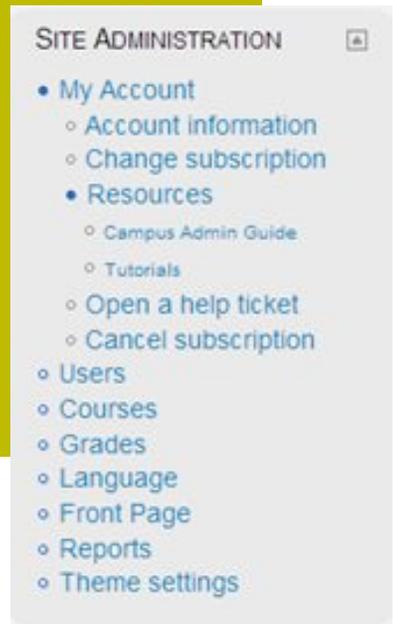
Not applicable

5. How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify) ✓
Cloud-based hosting via Amazon Web Services.
6. If the company’s LMS hosting is provided by a partner or partners, please list the name(s).
Not applicable
7. Briefly describe the company’s preferred or recommended hosting option.
Educadium’s EasyCampus SaaS hosting offers tremendous value for customers of all sizes and capabilities. There are three primary hosting options: Standard, Preferred, and Premium, which can be purchased and set up by the client from Educadium’s website. Custom-created installations are also available. Subscriptions can be purchased monthly or annually and correspond to features, total number of registered users and storage used. Add-ons, enhanced support, training, and professional services are available for all subscribers.
8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
Educadium has an annual record of more than 99.99% uptime. Routine maintenance and feature upgrades are handled through the Educadium Support team and support processes. Upcoming issues are communicated directly to clients via Email and RSS feeds on their site.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing
 - Yes, when requested for an additional fee ✓
 - No
 - Not applicable because the company does not host LMS installations

10. Provide any other information or notes relevant to the “Hosting” section.

Stand-alone volumes, custom backup strategies, and https secure serving are available upon request.

A view of the administrative panel in Easy Campus



Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
Yes
6. Provide any other information or notes relevant to the “Personalization” section.
Educadium's EasyCampus is a highly customizable, role-based LMS for administrators and end-users.

customized (e.g., handled entirely via cascading style sheets).

Yes. Educadium's EasyCampus offers a standard logo-uploading tool and 20+ color themes for branding purposes. Custom theming, including website matching, and CSS development is available as an optional Professional Service during set up or afterwards.

2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).
Yes. —
3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.
Yes. Administrators can use role-based blocks (standard or custom) to define how various end-user roles see the landing pages and course pages.
4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.
Yes. —

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
Yes. Administrators have access to a site landing page (or home page) which they can customize by role using blocks and settings.
6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.
Yes. —
7. Provide any other information or notes relevant to the “Interface Configuration” section.
—

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally

located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

Yes

3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
Yes
5. Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes
6. In how many countries has the LMS been implemented for clients?
30
7. Please list the countries where the LMS has been implemented for a client.
Customized projects have been implemented around the world on all continents including: Mexico, UK, Canada, and Australia.
8. In how many languages has the LMS been implemented for clients?
—



Easy Campus provides support for many languages.

9. Please list the languages in which the LMS has been implemented for a client.

The Educadium LMS has been implemented in popular languages such as Spanish, German, Greek and French, among many others.

10. How many language packs are available for the *end-user* view of the LMS?

75

11. Please list the languages for which a language pack is available for the *end-user* view.

Afrikaans, Asturianu, Bosanski, Català, Čeština, Cymraeg, Dansk, Deutsch, Deutsch, Dzongkha, English, Español – Argentina, Español - España, Español - Mexico, Español - Internacional, Eesti, Euskara, Filipino, Suomi, Français Canada, Français, Gaeilge, Galego, Hrvatski, magyar, Indonesian, Íslenska, Italiano, Latin, Laotian, Lietuvių, Bahasa Melayu, Nederlands, Norsk, Norsk, Norsk, Polski, Portugese Brasil, Portugese Portugal, Slovenčina, Slovenščina, Samoan, Soomaali, Shqip, Srpski, Svenska, Tamil, Thai, Tagalog, Tongan, Vietnamese, isiZulu, 10+ other languages.

12. How many language packs are available for the *administrator* view of the LMS?

75

13. Please list the languages for which a language pack is available for the *administrator* view.

Afrikaans, Asturianu, Bosanski, Català, Čeština, Cymraeg, Dansk, Deutsch, Deutsch, Dzongkha, English, Español – Argentina, Español - España, Español - Mexico, Español - Internacional, Eesti, Euskara, Filipino, Suomi, Français Canada, Français, Gaeilge, Galego, Hrvatski, magyar, Indonesian, Íslenska, Italiano, Latin, Laotian, Lietuvių, Bahasa Melayu, Nederlands, Norsk, Norsk, Norsk, Polski, Portugese Brasil, Portugese Portugal, Slovenčina, Slovenščina, Samoan, Soomaali, Shqip, Srpski, Svenska, Tamil, Thai, Tagalog, Tongan, Vietnamese, isiZulu, 10+ other languages.

14. Provide any other information or notes relevant to the “Internationalization and Localization” section.

As a global hosted platform, the Educadium EasyCampus LMS provides support for learners in different geographic areas and in different languages. More than 70 language packs are provided for site creation. Help ticket systems offer multi-lingual translation support. Educadium employs a multi-national team.

Search and Catalogs

- How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs.
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
- What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users ✓
 - The LMS does not support search by end users.
 - Other (please specify) ✓
Custom search capabilities available on a custom basis.
- What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs
 - Search general site content ✓

- Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify) ✓
Advanced and third-party search capabilities available on a custom basis.
4. Provide any other information or notes relevant to the "Search and Catalogs" section.
-

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education ✓
 - Third-party "off-the-shelf" courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course.
 - The end user spends a specified minimum amount of time in the course. ✓

- The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user's status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify) ✓
Course completion is managed by the use of a certificate the user generates. This certificate can be locked using various criteria such as overall grade, time spent in course, or grades on specified activities. In this sense, it's an automated process. Please note that course completion can be further controlled by page-locking if desirable (i.e., a student cannot move ahead to a certain section until s/he has completed by grade or access) an activity in a previous section.
3. Does the LMS provide the ability to author learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
Authored content can be imported. However, several learning activity and assessment modules offer the ability to create learning content (e.g., quizzes). Moreover, EasyCampus course templates can be authored based on criteria which create a number of fill-in-the-blank learning objects on pre-created course pages. These templates can be edited heavily by users or modified using on-screen editors and simple forms. A unique campus and course-creation wizard is included.

EasyCampus

Course wizard

Step 1 > Step 2 > Step 3 > Step 4 > Step 5

In less than 5 minutes, you can create an EasyCampus course.

Course title* i

Course ID i

Course description* i

Course welcome i

EasyCampus provides a course wizard to speed the course creation process.

EasyCampus supports self-paced courses with video content.

The screenshot shows a course page with a navigation menu at the top: HOME, MODULE 1, MODULE 2, MODULE 3, MODULE 4, MODULE 5, MODULE 6, MODULE 7, MODULE 8, RESOURCES, CERTIFICATE. The main content area is titled "Workplace Project Management" and includes a video player showing a man speaking. To the left of the video are two boxes: "DIRECTIONS" with instructions to use the Main Menu and a link to begin, and "IMPORTANT!" with a note about Flash player requirements and a download button for Adobe Flash Player. To the right of the video is a "NOTE" box stating that this is a self-paced course with no active instructor presence and that technical support should be directed to the help ticketing system.

4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
Note that on request, an Educadium HTML 5 player can be made available to customers who need this for iPad tablets, etc.
5. Does the LMS support offline authoring of learning content?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
Educadium's EasyCampus import tools allow for uploading and placement of externally authored learning content. Educadium Professional Services can assist with offline authoring of learning content as required.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Check in/check out functionality
Standard
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Completely custom
 - Ability to monitor progress on tasks
Completely custom
 - Ability to add internal comments (viewable only by other administrators)
- to content
Semi-standard
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
- Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
8. Can the LMS generate printer-friendly content?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
PDF files can be added as course content so users can easily download or print them.
9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
Custom and third-party DRM solutions available.
10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Browser-delivered online content ✓
 - Downloadable version ✓
 - CD or DVD
 - HTML ✓
 - SWF ✓
 - PDF ✓
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
The Educadium EasyCampus LMS is a flexible platform and supports most popular tools. Our Professional Services group has worked successfully and trained clients on a variety of authoring tools, including Articulate, iSpring, and Raptivity.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
—

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Third-party
 - Personnel management (for scheduling instructors and facilitators)
Third-party
 - Facility management (for scheduling rooms)
Third-party
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Third-party
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Semi-standard
 - Customizable e-mail messages and notifications to administrators
Semi-standard
2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
Yes. An optional attendance Add-On facilitates classroom and conference management.
3. Provide any other information or notes relevant to the “In-person, Place-based Courses” section.
Educadium has implemented Add-On and standard solutions for place-based and hybrid courses.

Webinars

1. Does the LMS provide integrated Webinar functionality?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
The Premium LMS subscription packages offers Conference, a live whiteboarding and desktop-sharing too, as a standard feature at no extra charge. The EasyCampus LMS platform can also be loosely or tightly integrated with a variety of third-party webinar and whiteboarding solutions for single sign-on and scheduling.
2. Briefly describe the company’s preferred or recommended Webinar software.
Included with its LMS, Educadium offers a lightweight, affordable webinar and whiteboarding solution called Conference as part of its Premium subscription package and sold as an Add-On. This Conference tool allows for screensharing, VOIP conferences, webcams, and presentations for up to 25 users per session. For more intensive webinar requirements, Educadium recommends webinar software based on clients’ specific business and learning requirements. GoToMeeting, WebEx, Adobe Connect Pro and other software have been used successfully with EasyCampus.
3. Provide any other information or notes relevant to the “Webinars” section.
Please contact info@educadium.com for more information about webinar solutions and step guides.

Users can self-register in EasyCampus.

Sunset TRUCKING

You are logged in as Demo Admin (Logout)

SITE ADMINISTRATION

- My Account
- Users
 - Browse list of users
 - Add user editors
 - ADD A NEW USER**
 - Unlink user profile
 - User profile fields
- Permissions
- Courses
- Grades
- Language
- Front Page
- Reports
- Theme settings

Sunset TRUCKING DRIVER TRAINING

View examples of self-paced courses and EasyCampus features. Your EasyCampus can and will look different. Contact [Educadium](#) for custom requirements.

Click on a course or a course bundle to experience the class as a learner. Use the enrollment code ABC123 to get into the course bundle without payment required. Use the enrollment code 123ABC for the individual courses.

SAFETY MATTERS!

NIGHTMARES OF TRUCK

TRUCKING INDUSTRY NEWS

YRC Worldwide workers face cuts from pension fund

Pension fund cuts benefits for YRC workers

Central States pension plan cuts benefits to YRC Worldwide union employees

YRC unit plans to hire 100 salespeople

YRC Worldwide national subsidiary plans to hire 100 salespeople

ROSTER

Roster

Sunset TRUCKING

You are logged in as Demo Admin (Logout)

SITE ADMINISTRATION

- My Account
- Users
 - Browse list of users
 - Add user editors
 - Unlink user profile
 - User profile fields
- Permissions
- Courses
- Grades
- Language
- Front Page
- Reports
- Theme settings

General

Username:

Authentication method: Manual accounts

New password:

Force password change:

First name:

Last name:

Email address:

Email display: Allow only other course members to see my email address

Email activated: This email address is enabled

Email format: Pretty HTML, formal

Email digest type: No digest (single email per forum post)

Forum auto-subscribe: Yes, when I post, subscribe me to that forum

Forum tracking: No, don't keep track of posts I have seen

When editing text: Use HTML editor (some browsers only)

AJAX and Javascript: No, use basic web features

Screen reader: No

City/town:

Select a country:

Timezone: Server's local time

Preferred language: English (en_us)

Description:

Name:

Picture of

Current picture: None

Delete:

New picture (Max size: 40MB):

Picture description:

Interests

List of interests:

Optional

Web page:

ICQ number:

Skype ID:

AIM ID:

Yahoo ID:

MSN ID:

ID number:

Institution:

Department:

Phone:

Mobile Phone:

Address:

Other fields

State:

Zip:

There are required fields in this form marked *

Administrators can create new users in EasyCampus.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	id	username	email	password	firstname	lastname	idnumber	institution	department	phone1	phone2	city	url	icq	skype
2	2	superadmin	support@educadum	Super	Admin							Everywhere			
3	3	campusad	noreply2@educadum	Demo	Admin					555-555-5555		educadum			
4	4	student	email@dem	changeme	Demo	Student				555-555-5555		Portland			

Administrators can easily create multiple new users via an upload in EasyCampus.

EasyCampus Demo > Administration > Users > Accounts > Upload users

Sunset TRUCKING

Upload users

Upload

File (Max size: 40MB)

CSV delimiter

Encoding

Preview rows

UPLOAD USERS

There are required fields in this form marked*.

Registration

1. How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify) ✓
Single sign-on solution with another platform.
2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
4. Does the LMS provide self-serve password recovery help for end users?
Yes
5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
No
7. Can the fields for end user profiles be added, edited, and deleted?
Yes
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
Yes

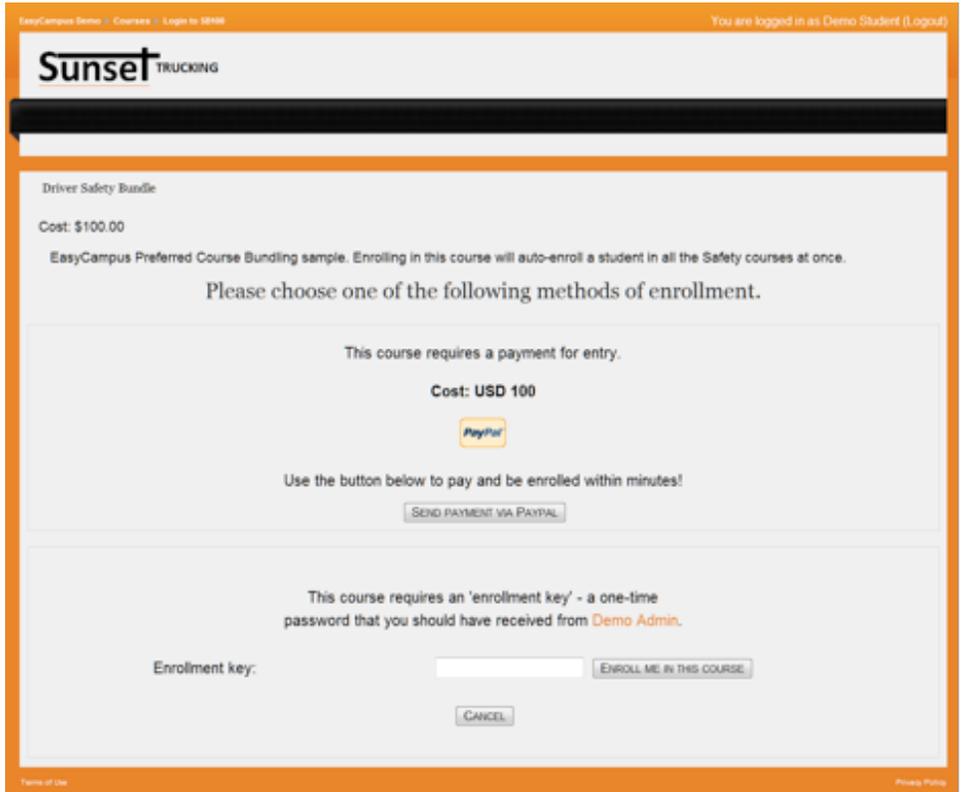
10. Provide any other information or notes relevant to the “Registration” section.

For custom registration projects, Educadium developers are familiar with single sign-on support, popular association/student information systems, and authentication mechanisms including Shibboleth and LDAP.

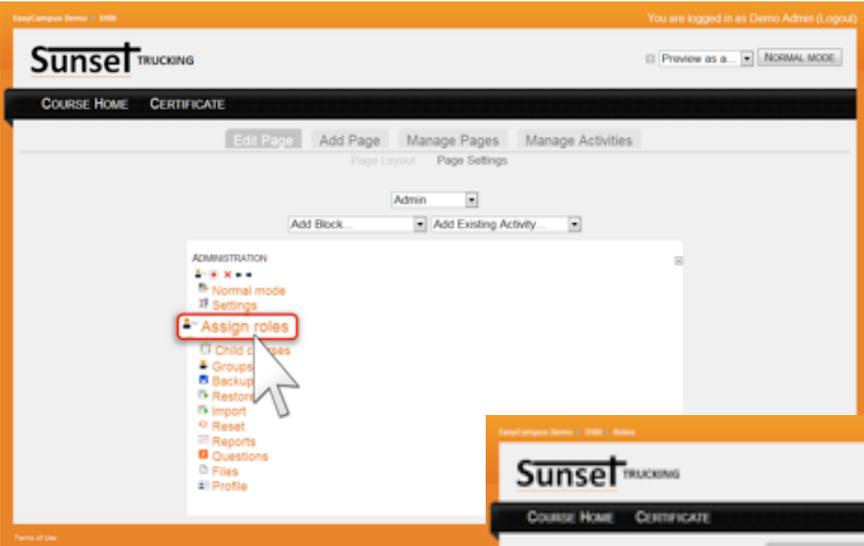
Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes
3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis ✓
 - Other (please specify)
4. Can enrollments occur based on end user-specific criteria?
 - The end user’s role in the system ✓
 - The end user’s score on an assessment
 - The end user’s completion of prerequisites for a particular course
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify) ✓
Custom enrollment criteria available as a Professional Service.

Users can pay via e-commerce or use a key to enroll in courses in EasyCampus.



Administrators can use roles in EasyCampus to help manage enrollments.



5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?

Yes

6. Provide any other information or notes relevant to the "Enrollment" section.

—

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?

Yes

2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?

No

3. To what types of learning content can credit be assigned?
- Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)

4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?

- Automatically upon end user completion of the content
- By the end user claiming the credit ✓
- By an administrator awarding the credit to end users one by one
- By an administrator performing a bulk upload
- By the end user claiming the credit and an administrator approving the claim
- The LMS does not support credit for this type of learning content.
- Other (please specify)

5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?

- By the end user claiming the credit
- By an administrator awarding the credit to end users one by one
- By an administrator performing a bulk upload
- By the end user claiming the credit and an administrator approving the claim
- The LMS does not support credit for this type of learning content.
- Other (please specify) ✓

Offline assignments are tracked and graded by the teacher/administrator. These grades can be used as the sole means of awarding a CEU stamped certificate, or can be used in conjunction with other parameters.

6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?

- By the user claiming the credit
- By the user claiming the credit and an administrator approving the claim
- The LMS does not support credit for this type of learning content.

- Other (please specify) ✓
A particular activity such as a PDF article can be given an access lock. This lock means that the user has clicked the article but not necessarily that s/he has read it. However, the course can be set not to progress unless that article is accessed.
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
- Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis
 - No
 - Other (please specify) ✓
Course-by-course options available on a custom basis.
9. Does the LMS help *end users* track their own continuing education or certification requirements?
—
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines)
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
- No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
No
12. Can end users view and print their own transcripts?
No
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
Yes. Course-based ePortfolios are available for end-users and robust third-party integration is available with third-party applications.
14. How many clients use the LMS to manage continuing education or certification?
—
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE) ✓
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university ✓
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify) ✓
Competency and expertise tracking.

16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.
Most Educadium clients use the LMS for continuing education and certification purposes. Additional continuing education and certification tools are available on a semi-custom basis.

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another may only require users to achieve a 70% to pass)?
Yes
4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
 - Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
 - Per question ✓
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option ✓
 - Based on which distracter the end user selected ✓
 - Per assessment ✓
 - Based on the end user’s overall performance on the assessment ✓
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
Yes
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
No
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
 - Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)

12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment)
 - The LMS does not provide for time limits for assessments.
 - Other (please specify) ✓
- Additional time limit and tracking tools available on a custom basis.*
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/ false or yes/ no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order) ✓
 - Hotspot questions (where users must select the correct area of a graphic) ✓
 - Drag-and-drop questions ✓
 - Other (please specify)
18. Provide any other information or notes relevant to the “Assessments” section.
Non-standard assessment features are available on a custom basis.

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
- Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
Yes

5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row) ✓
 - Matrix of choices (multiple answers per row) ✓
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields ✓
 - Date fields ✓
 - Time fields
 - Demographic information
 - Other (please specify)

11. Provide any other information or notes relevant to the “Evaluations” section.

Question banks are available as a custom survey project or within the EasyCampus quiz-builder system.

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
No
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users’ profiles or store additional metadata on courses)
 - Other (please specify) ✓

Ad-hoc report tools available on a custom basis.
5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML)
 - Other (please specify) ✓

Exporting of report data in nicely formatted available on a custom basis.

6. How many standard, pre-configured reports are available in the LMS?
5
7. List and briefly describe the standard, pre-configured reports available in the LMS.
End User Report, E-Commerce/Tuition Report, Course Overview, Logs, Statistics.
8. Briefly describe the process for creating ad-hoc reports in the LMS.
—
9. How many custom reports does the company typically develop for a client implementation of the LMS?
—
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
Educadium has developed custom reports for a variety of clients. Custom registration fields as well as course and assessment data can be presented in on-screen and downloadable formats.
11. Provide any other information or notes relevant to the “Reporting” section.
Item analysis data for assessments is available on a custom basis. Optional Add-Ons have additional reporting capabilities (e.g., activity time tracking).

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client’s different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓

- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
- Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
- Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
- Each site in a single client implementation can have its own set of customized reports. ✓
- Other (please specify)

2. How many clients have a multiple-site implementation of the LMS?
—
3. On average, how many sites are part of a client’s multiple-site implementation of the LMS?
—
4. Provide any other information or notes relevant to the “Support for Multiple Sites” section.

Educadium offers EasyCampus Network, a multi-site, peer-to-peer administration tool. Educadium also offers a “site cloning” service to help create branded copies of master sites that could include standard course content to multiple clients.

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Standard
 - End user-to-administrator e-mail
Standard

- Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Completely custom
 - Live chats (for multiple end users)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Completely custom
 - Live voice-over-IP
Semi-standard
 - Virtual whiteboard
Semi-standard
 - Virtual presentations (e.g., PowerPoint-driven)
Semi-standard
 - Screencasting
Semi-standard
 - Application-sharing
Third-party
 3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No. Custom development required.
 4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
The Educadium EasyCampus LMS offers a number of messaging and communications tools. Custom integration is also available for third-party solutions. Educadium’s screencasting and whiteboarding tools (aka Conference) are available for Premium subscribers or as an optional Add-On license.
- Ability to associate a wiki with a course
Standard
 - Single-point Web camera capability
Semi-standard
 - Multiple-point Web camera capability
Semi-standard
 - Networking (e.g., ability for end users to connect with one another)
Third-party
 - Ability for each registered end user to have a blog
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard

- Handles transactions for physical items (e.g., books or CDs)
Completely custom
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Semi-standard
 - Handles payment by invoice (manual intervention needed)
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
-
- Handles sales tax, including variations based on the state or region
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
 - Multiple shipping options can be configured for physical goods
 - Customizable e-mail message to users making the purchase
 - Automatic e-mail message on purchase to administrators
 - Customizable e-mail message to administrators
 - Automatically maintains order status that can be checked by end user
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Semi-standard
 - Handles discounts (e.g., by accepting discount codes)
Semi-standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net ✓
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments ✓
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify) ✓
Support for payment gateways offered on a custom basis.

Educadium offers free online support for Easy Campus.

5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.

Yes

6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.

Educadium offers a built-in CampusPay system for selling and accounting for tuition-based courses via credit cards and PayPal. Payments (less a transaction fee) are sent monthly to clients. A Custom Tuition Payment Add-On and other shopping cart options are also available as semi-standard solutions.

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?

Yes

8. Provide any other information or notes relevant to the "E-commerce" section.

—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Semi-standard
 - Live telephone support for administrators
Semi-standard
 - E-mail support for end users
Standard
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Standard
 - Self-serve, searchable knowledge base for administrators
Standard

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Help tickets, webinars (standard).
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Semi-standard
 - Scheduled online training (e.g., Webinars) for administrators
Semi-standard
 - Scheduled in-person training at client offices for end users
Semi-standard
 - Scheduled in-person training at client offices for administrators
Semi-standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Semi-standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
 3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Depending on the subscription package, telephone support for end users is available Monday-Friday 8am--6pm EST.
 4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Depending on the subscription package, telephone support for administrators is available Monday-Friday 8am--6pm EST.
 5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Educadium support personnel endeavor to answer all help tickets and support questions within one business day.
 6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Educadium support personnel endeavor to answer all help tickets and support questions within one business day.
 7. Briefly describe the company's typical ongoing communication with its LMS clients.
Educadium communicates regularly with its EasyCampus LMS clients. This includes newsletters, blogs, Twitter feeds, Facebook, and RSS feeds.
 8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
All EasyCampus end users receive free and unlimited access to help tickets for communications with Educadium Support personnel.
 9. Provide any other information or notes relevant to the "Support and Training" section.
Educadium is proud to offer an extensive LMS help network and optional live training for campus administrators and end-users. Free materials include a campus administrator's guide, step guides, online videos, a training campus with courses, and a Customer Support Knowledge Base.

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)

2. What approximate percentage of your client implementations to date have involved custom programming work?

—

3. Briefly describe the typical custom programming services provided for client implementations of the LMS.

Educadium provides a range of affordable custom programming and engineering services. Common services include: Data integration for single-sign and authentication; customized learning activities and reporting; e-commerce. All work is performed in the United States by Educadium staff.

4. Briefly describe the process for used for planning and implementing custom programming work.

As an advanced software-as-a-service (SaaS) provider, Educadium's development team embraces a proven development methodology for mission-critical applications. For custom programming work, Educadium Professional Services provides highly customized solutions that fit targeted needs. Our project managers collaborate with clients on business requirements, working closely with in-house engineers and production personnel to manage budgets and timetables. Every custom programming project includes a 60-day limited warranty to ensure specified functionality and customer satisfaction.

5. Please specify the location (by time zone) of personnel involved in custom programming.

—

6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - Other (please specify)

7. Please specify the location (by time zone) of personnel involved in custom content development.

—

8. Provide any other information or notes relevant to the "Custom Programming and Content Development" section.

Additional information and examples of custom programming and content development are available upon request.

iCohere iCohere

LMS Version: 10

Value proposition: *iCohere enables implementation of collaborative and self-paced courses and educational virtual conferences.*

Top clients (associations): *NAEYC • Learning Forward • ASAE • AACN*

Top clients (non-associations): *NIH • Case Western Reserve U • USFS • The Library of Congress*

URL for more information about the LMS:
http://www.icohere.com/elearning_communities.htm

Three-year pricing: *\$60,000 to \$300,000*

Hosting: *By company or by client*



Industry focus: health care and education



iCohere

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Walnut Creek, CA 94596

202.870.6146

sales@icohere.com

<http://www.icohere.com>





Our Take on iCohere Some Highlights

iCohere was social before social was cool. The company's founders, Pascal and Soren Kaplan, built the iCohere platform specifically to support collaboration-driven learning communities.

Not surprisingly, given the company's emphasis on communities of practice and learning events, the iCohere platform environment feels less like a traditional learning management system, in which the presentation of content objects is the focus, and more like a grouping of related interactions. iCohere has leveraged this approach to offer not only traditional learning management capabilities but also to expand rapidly into the market for virtual conference platforms.

- The iCohere system features integrated discussion boards, chat, announcements, learner blogs, and basic social networking tools that facilitate the learning community approach.
- The system also features an integrated Web/video conferencing system with voice-over-IP (VoIP), video, desktop sharing, closed captioning, and session recording. A standard license includes an unlimited-use 200-seat room.
- The system offers basic project management capabilities that allow teams to assign tasks and subtasks along with dependencies, responsibilities, and due dates.
- The company has an embedded video player option that allows for unlimited video uploads by users (additional fee applies).
- Included free with annual subscriptions, iCohere Mobile provides users with access to almost everything in an iCohere site through a normal phone Web browser.
- Version 10 of iCohere added a well-rounded assessment capability that supports organizing tests by categories (e.g., that map to standards), the creation of question banks, and the ability to tag questions and indicate their level of difficulty. Reports, for both learners and administrators, provide detailed feedback and allow for item analysis to identify any bum questions.
- Version 10 also strengthened the system's ability to support client branding.

As one company representative put it, "If you are not into collaborative learning, iCohere is not the right choice for you." If your focus is on learning events and community (rather than on-demand content), iCohere should be on your list to consider.

General Company Information

1. When was the company founded?
1995
2. How many employees does the company currently have?
20
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
iCohere is an affordable, highly configurable professional learning & collaboration platform for online events, eLearning and professional communities. Beyond technology, we offer facilitation strategies, action plans and consulting services to help you create valuable online communities.
5. Provide the company's contact information.
*1220 Oakland Blvd., Suite 210
Walnut Creek, CA 94596
USA
lance@icohere.com
202-870-6146*
6. Provide the URL for the company's Web site.
http://www.icohere.com
7. Provide any other information or notes relevant to the "General Company Information" section.
iCohere has built hundreds of online communities for large and small organizations including associations, government agencies, non-profits and corporations. Most importantly, we are still committed to our founding principles.
 - *200+ organization clients*
 - *350,000 clients*
3. When was the first version of the LMS initially released?
1/1/2001
4. Briefly describe the upgrade cycles for the LMS.
We provide upgrades every ~4 months.
5. How many associations use this LMS?
12
6. How many organizations in total use this LMS, including associations?
200
7. How many end users are registered in the single largest client implementation hosted by the company?
200,000
8. How many end users are registered in the single largest client implementation hosted by the client?
100,000
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
300,000
10. Briefly describe the value proposition for this LMS as it applies to associations.
iCohere enables implementation of collaborative and self-paced courses and educational virtual conferences.
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
50%
 - 500 to 2,499 registered end users
25%
 - 2,500 to 4,999 registered end users
25%
 - 5,000 to 9,999 registered end users
0%
 - 10,000 to 24,999 registered end users
0%
 - 25,000 or more registered end users
0%

General LMS Information

1. What is the name of the LMS product?
iCohere
2. Provide the product version described in this survey response.
10

12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
- 1,000 or less
10%
 - 1,001 to 5,000
15%
 - 5,001 to 10,000
20%
 - 10,001 to 25,000
20%
 - 25,001 to 50,000
20%
 - 50,001 to 100,000
10%
 - More than 100,000
5%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
- Less than 100
10%
 - 101 to 200
15%
 - 201 to 500
20%
 - 501 to 1,000
20%
 - 1,001 to 5,000
20%
 - More than 5,000
15%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
Health care and Education are our two largest areas.
15. Please list the company's top *association* clients.
NAEYC • Learning Forward • ASAE • AACN
16. Please list the company's other (non-association) top clients.

NIH • Case Western Reserve U • USFS • The Library of Congress

17. Provide a URL for more information about the LMS.
http://www.icohere.com/elearning_communities.htm
18. Provide any other information or notes relevant to the "General LMS Information" section.
—

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)
 - Complex
90
 - Typical
30
 - Simple
10
2. Briefly describe the implementation process.
Instructional design; Learning object implementation; Collaboration process design; Site configuration.
3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.
Training manager; Instructional designer; Project manager.
4. Please specify the location (by time zone) of company personnel involved in implementation.
-7 and -5 UTC

5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
Project manager; Instructors; Executive Director.
6. Provide any other information or notes relevant to the “LMS Implementation” section.

—

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$20,000
 - 2,500
\$40,000
 - 5,000
\$60,000
 - 10,000
\$80,000
 - 25,000
\$100,000
 - Unlimited
Not applicable
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$60,000
 - 2,500
\$120,000
 - 5,000
\$180,000
 - 10,000
\$240,000
 - 25,000
\$300,000
 - Unlimited
Not applicable
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$60,000
 - 2,500
\$120,000
 - 5,000
\$180,000
 - 10,000
\$240,000
 - 25,000
\$300,000
 - Unlimited
Not applicable
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$60,000
 - 2,500
\$120,000
 - 5,000
\$180,000
 - 10,000
\$240,000
 - 25,000
\$300,000
 - Unlimited
Not applicable

company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

- 500
\$80,000
 - 2,500
\$144,000
 - 5,000
\$215,000
 - 10,000
\$300,000
 - 25,000
\$350,000
 - Unlimited
Not applicable
5. Briefly describe the pricing model for the LMS.
iCohere is priced based on the total number of enabled users. Clients can generate multiple iCohere sites. Users can be enabled/disabled at any time.
 6. Briefly describe the payment schedule.
Under \$10,000 total fees due up front. Otherwise 1/3 up front, 1/3 mid-way, 1/3 at implementation completion.
 7. Briefly describe pricing for additional services.
We provide a full range of customization services including programming and design, plus instructional design. General rates are \$140 / hour for production support, \$160 for web or program development.
 8. Provide any other information or notes relevant to the “Pricing” section.
—

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Windows Server, MS SQL Server.

2. Briefly describe the technical framework and code structure of the LMS.
Proprietary.
3. Briefly describe the LMS’s ability to share data for the purposes of migration and integration.
Web-based XML interface for moving data between applications.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
Our implementation is very scalable, SaaS architecture. Hosted at PEER1.
5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
None.
6. Provide any other information or notes relevant to the “Technology” section.
iCohere is a Cloud service.

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
All modern web browsers supported across Windows & Mac. Mobile devices through mobile web browser.
2. What are the technical requirements for an *administrator* to access the LMS?
All modern web browsers supported across Windows & Mac.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the “System Requirements” section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
5%
2. Briefly describe the typical types of integration for the LMS.
External database or AMS (member database) systems.
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
XML-based web services.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
Requirements; Specification; Project Plan; Contract; Implementation.
5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect
 - Elluminate
 - Genesys
 - GoToWebinar
 - Microsoft Live Meeting
 - ReadyTalk
 - WebEx
 - Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify) ✓
iCohere includes a bundled high-end webinar system.
6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
 - Aptify (Aptify)
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid)
 - CRM for Members (ProTech)
 - IMIS (Advanced Systems International)
 - IRMembership (IRM Systems)
- Members360 (Affiniscape)
- netFORUM (Avecetra)
- Office Manager (internet4associations)
- Personify (TMA Resources)
- TIMSS (TMA Resources)
- Wild Apricot (Wild Apricot)
- Completely custom (non-commercial) AMS ✓
- The LMS has never been integrated with an AMS.
- Other (please specify)
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
 - ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS. ✓
 - Other (please specify)
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
No
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
Yes. Various e-commerce systems.
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
Yes. MS Office, Camtasia, Articulate.

11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.

Yes. SurveyMonkey, other internet tools.

However, note that iCohere 10 INCLUDES an assessment module so third-part testing tools are not required.

12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.

Yes. iCohere includes a high-end bundled survey tool.

13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.

No

14. Provide any other information or notes relevant to the “Integration and Interoperability” section.

—

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?

- AICC
- IMS Global Learning Consortium
- Medbiquitous
- SCORM 1.1
- SCORM 1.2
- SCORM 2004
- Section 508 ✓
- The LMS does not produce content that conforms to any of these guidelines or standards.
- Other (please specify)

2. Can the LMS play content that conforms to guidelines or standards?

- AICC
- IMS Global Learning Consortium
- Medbiquitous
- SCORM 1.1
- SCORM 1.2

- SCORM 2004
- The LMS does not play content that conforms to any of these guidelines or standards. ✓
- Other (please specify)

3. Provide any other information or notes relevant to the “Standards and Guidelines” section.

—

Hosting

1. Is the LMS available as a *company-hosted* solution?

Yes

2. How many LMS installations are hosted by the *company*?

6

3. Is the LMS available as a *client-hosted* solution?

Yes

4. How many LMS installations are hosted by the *client*?

200

5. How does the company provide LMS hosting?

- On servers managed directly by the company ✓
- On servers managed by a partner
- Not applicable because the company does not host installations of the LMS
- Other (please specify)

6. If the company’s LMS hosting is provided by a partner or partners, please list the name (s).

PEER 1.

7. Briefly describe the company’s preferred or recommended hosting option.

SaaS.

8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.

We have virtually no unscheduled downtime. Upgrades and maintenance are scheduled on weekends.

9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing
 - Yes, when requested for an additional fee ✓
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the “Hosting” section.

Cloud hosted service.

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users’ prior activities, profile data, or role in the system?
No
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
No
6. Provide any other information or notes relevant to the “Personalization” section.
—

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
Yes. —
2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).
No
3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.
Yes. —
4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.
No
5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
Yes. —
6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.
No
7. Provide any other information or notes relevant to the “Interface Configuration” section.
—

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
No
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
No
5. Can administrators change the default time zone used for formatting dates and times in the LMS?
No
6. In how many countries has the LMS been implemented for clients?
12
7. Please list the countries where the LMS has been implemented for a client.
UK, various countries in Europe, Africa, Asia.
8. In how many languages has the LMS been implemented for clients?
5
9. Please list the languages in which the LMS has been implemented for a client.
English, French, Portuguese, Spanish, German.
10. How many language packs are available for the *end-user* view of the LMS?
5

11. Please list the languages for which a language pack is available for the *end-user* view.
English, French, Portuguese, Spanish, German.
12. How many language packs are available for the *administrator* view of the LMS?
5
13. Please list the languages for which a language pack is available for the *administrator* view.
English, French, Portuguese, Spanish, German.
14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
—

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog.
 - Administrators can create multiple catalogs.
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in).
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll).
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog
 - Search across multiple catalogs
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for other end users
 - The LMS does not support search by end users.
 - Other (please specify)

The screenshot displays the OvationNet AI Workshop interface. The main content area is titled 'Weekly Activities' and shows a table for 'Week 1'. A red circle highlights the first task in the table: '1. Presentation: A Time to Reflect'. Below the table, there is a list of tasks: '1. Welcome to the workshop!', '2. Welcome to the workshop!', '3. Weekly Activities', '4. Weekly Activities', '5. Posting to a Discussion', '6. Using the Contribute Form', '7. Posting Options', '8. Workshop intro', '9. Weekly Live Meetings', '10. The Learning Library', '11. Learning Lines', '12. The Directory', '13. Quiz Meetings', '14. My Messages', '15. My Settings', and '16. Enjoy the workshop!'. The interface also includes a navigation menu on the left, a user profile for David Cooperider, and a list of tasks below the table.

iCohere
course
overview

3. What types of search are available to administrators in the LMS?
 - Search within a single catalog
 - Search across multiple catalogs
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for end users
 - Search for other administrators
 - The LMS does not support search by administrators.
 - Other (please specify)
4. Provide any other information or notes relevant to the "Search and Catalogs" section.

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
2. By which criteria can online courses be marked completed?
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education ✓
 - Third-party "off-the-shelf" courses ✓
 - Other (please specify)
- The end user views all screens in the course. ✓
- The end user spends a specified minimum amount of time in the course. ✓
- The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
- An administrator marks the end user's status in the course completed. ✓

- Online courses cannot be marked completed in the LMS.
 - Other (please specify)
3. Does the LMS provide the ability to author learning content?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
—
 4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
—
 5. Does the LMS support offline authoring of learning content?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
—
 6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Check in/check out functionality
Standard
 - Ability to review content before it is published
Semi-standard
 - Ability to assign tasks to administrators
Standard
 - Ability to monitor progress on tasks
Standard
 - Ability to add internal comments (viewable only by other administrators) to content
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 8. Can the LMS generate printer-friendly content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
Web browser printing function, or PDF/Word.
 9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
—

10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Browser-delivered online content ✓
 - Downloadable version ✓
 - CD or DVD ✓
 - HTML ✓
 - SWF ✓
 - PDF ✓
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

The screenshot displays the iCohere document library interface. The main content area shows a search results table for 'Find Documents' with the following data:

Contributor	Date	Type	Title	Views	Delete
# 3178	Leon Pointret 04/11/05 03:00 PM	pdf 379K	What Is AI? Suggested reading for Week 1 Full reference: A Positive Revolution in Change: Appreciative Inquiry by David L. Cooperrider and Diana Whitney	238	
# 3094	Lindsey Godwin 05/08/06 02:16 PM	pdf 821K	Week 1 Activity Worksheets Week 1 Activity worksheets to the Paired AI Interviews	283	
# 3216	Lindsey Godwin 01/29/07 03:16 PM	pdf 37K	Workshop Syllabus yllabus for the workshop, including an outline of readings, learning presentations and learning activities for the 6 weeks	141	

The interface includes a sidebar with navigation options like 'Weekly Activities', 'Directory', 'Chat Rooms', and 'Find Documents'. The top navigation bar shows 'Find Documents' and a search input field. The bottom of the page features a 'LOGOUT' button and a search bar.

iCohere
document
library

16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
Articulate, Camtasia.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
—

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard

- Waitlisting
Semi-standard
- Personnel management (for scheduling instructors and facilitators)
Unavailable
- Facility management (for scheduling rooms)
Unavailable
- Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Unavailable
- Automatic e-mail messaging and notification to end users
Standard
- Automatic e-mail message and notification to administrators
Standard
- Customizable e-mail messages and notifications to users
Standard
- Customizable e-mail messages and notifications to administrators
Standard

2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
Yes. We have many clients using iCohere in this way for multi-day educational conferences with sessions, racks, archives, discussions, etc. This is an area of major strength for us.
3. Provide any other information or notes relevant to the "In-person, Place-based Courses" section.
—

Webinars

1. Does the LMS provide integrated Webinar functionality?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party

- Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
Integrated for scheduling, login, reporting. Unlimited back-to-back meetings. Open to students. Breakout sessions. Instant meetings.
2. Briefly describe the company's preferred or recommended Webinar software.
Proprietary embedded.
 3. Provide any other information or notes relevant to the "Webinars" section.
200-seat room unlimited use comes with every license.

Registration

1. How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify) ✓
Enabling registration as the result of an e-commerce purchase would require custom development.
2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
4. Does the LMS provide self-serve password recovery help for end users?
Yes

5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
7. Can the fields for end user profiles be added, edited, and deleted?
Yes
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
Yes
10. Provide any other information or notes relevant to the "Registration" section.
—

Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify) ✓
Enabling enrollment as the result of an e-commerce purchase and enabling self-enrollment with administrator approval would require custom configuration.
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes

3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level
 - By course group
 - On a course-by-course basis
 - On an end user-by-end user basis
 - Other (please specify)
4. Can enrollments occur based on end user-specific criteria?
 - The end user's role in the system ✓
 - The end user's score on an assessment ✓
 - The end user's completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify) ✓
Several of the above through custom configuration.
5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes
6. Provide any other information or notes relevant to the "Enrollment" section.
Some of these capabilities require specification by client and custom development/configuration of their iCohere system.

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
Yes
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
Yes
3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓

- By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
- By the user claiming the credit ✓
 - By the user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
- Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
- Yes, on a sitewide basis
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines)
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No ✓
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
- Yes
12. Can end users view and print their own transcripts?
- Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
- No
14. How many clients use the LMS to manage continuing education or certification?
- 25
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME)
 - Continuing legal education (CLE)
 - Continuing professional education (CPE)
 - Certificate of successful completion
 - Credit towards completing or maintaining a certification, licensure, or other credential

- Credit towards a degree at a college or university
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify) ✓
WASC accreditation.
16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.
-

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify) ✓
Flexible web forms.
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another may only require users to achieve a 70% to pass)?
Yes
4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
 - Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment) ✓
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
 - Per question ✓
 - Based on whether the end user answered the questions correctly
 - Per distracter, or answer option
 - Based on which distracter the end user selected
 - Per assessment
 - Based on the end user’s overall performance on the assessment
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
No
8. Does the LMS automatically link assessment data to the performance reports available in the system?
No
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
No
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
No
11. Can the LMS require end users who initially fail to retake an assessment?
 - Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.

- The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented
 - By randomizing the order in which distracters, or answer options, are presented
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes) ✓
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.

- Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions)
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order)
 - Hotspot questions (where users must select the correct area of a graphic)
 - Drag-and-drop questions
 - Other (please specify)
18. Provide any other information or notes relevant to the "Assessments" section.
—

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
No
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
Yes

5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
No
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
No
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row)
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields ✓
 - Date fields ✓
 - Time fields ✓

- Demographic information
- Other (please specify)

11. Provide any other information or notes relevant to the “Evaluations” section.

—

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports ✓
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users’ profiles or store additional metadata on courses)
 - Other (please specify)
5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)

6. How many standard, pre-configured reports are available in the LMS?
20
7. List and briefly describe the standard, pre-configured reports available in the LMS.
Logins, Discussions, Documents, All Activities (each with various settings).
8. Briefly describe the process for creating ad-hoc reports in the LMS.
Point & click for selections.
9. How many custom reports does the company typically develop for a client implementation of the LMS?
0
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
Not applicable
11. Provide any other information or notes relevant to the “Reporting” section.
—

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client’s different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
 - Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓

- Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
50
 3. On average, how many sites are part of a client’s multiple-site implementation of the LMS?
3
 4. Provide any other information or notes relevant to the “Support for Multiple Sites” section.
—

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Standard
 - End user-to-administrator e-mail
Standard
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Standard

- Live chats (for multiple end users)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard
 - Live voice-over-IP
Standard
 - Virtual whiteboard
Standard
 - Virtual presentations (e.g., PowerPoint-driven)
Standard
 - Screencasting
Standard
 - Application-sharing
Standard
 - Ability to associate a wiki with a course
Standard
 - Single-point Web camera capability
Standard
 - Multiple-point Web camera capability
Standard
 - Networking (e.g., ability for end users to connect with one another)
Standard
 - Ability for each registered end user to have a blog
Standard
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Wikis planned, currently third-party.
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
—
- ### E-commerce
1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Standard
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Complete registration and payment processing to PayPal.

2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles sales tax, including variations based on the state or region
Standard
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Semi-standard
 - Customizable e-mail message to users making the purchase
Semi-standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Standard
 - Automatically maintains order status that can be checked by end user
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
- Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net
 - BluePay
 - CCAvenue
 - CyberSource ✓
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow
 - PayPal Website Payments ✓
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify) ✓
All of these can be supported if they have web APIs.
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
No preference.

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?

Yes

8. Provide any other information or notes relevant to the “E-commerce” section.

—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Live telephone support for end users
Standard
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Standard
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Standard
 - Self-serve, searchable knowledge base for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Standard
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Standard
 - Scheduled in-person training at client offices for administrators
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
In-person trainings are customized & billable.
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Must be contracted for -- 8am to 8pm U.S. Eastern daily. 24 hour and/or international support also available.
4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
8am to 8pm U.S. Eastern daily. 24 hour and/or international support also available.
5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
8am to 8pm U.S. Eastern daily. 24 hour and/or international support also available.
6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
8am to 8pm U.S. Eastern daily. 24 hour and/or international support also available.

7. Briefly describe the company's typical ongoing communication with its LMS clients.
iCohere Users Group (iCUG) site is very active. Also via email & phone as needed.
8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
—
9. Provide any other information or notes relevant to the "Support and Training" section.
—

6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel
 - Yes, through a partner ✓
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.
-7, -6, and -5 UTC
8. Provide any other information or notes relevant to the "Custom Programming and Content Development" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
10%
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
Custom features; database integration; payment integration; registration systems.
4. Briefly describe the process for used for planning and implementing custom programming work.
Requirements; specification; contract; implementation.
5. Please specify the location (by time zone) of personnel involved in custom programming.
-7 and -5 UTC

InReach CEMS InReach



Industry focus: legal, healthcare, and financial services

LMS Version: *InReach 2012*

Value proposition: *The InReach continuing education management system (CEMS) was designed specifically for professional associations and to handle accredited continuing education content.*

Top clients (associations): *State Bar of California • Texas Medical Association • New York State Society of CPAs*

Top clients (non-associations): *No non-association client information was provided by the company.*

URL for more information about the LMS:

<http://www.inreachce.com/solutions/inreach-ce-management-system>

Three-year pricing: *No pricing information was provided by the company.*

Hosting: *By company only*

InReach

5700 S Mopac, Suite C310
Austin, Texas 78749

512.381.1570

info@inreachce.com

INREACH

CONTINUING EDUCATION SOLUTIONS



Our Take on InReach CEMS

Some Highlights

President Brian Giuffrida describes InReach’s typical customers as landlocked—caught up in instructor-led, place-based learning—but looking to break out and extend the reach of their continuing education offerings. That focus on CE is reflected in the name of the company’s platform: InReach CEMS. As InReach sees it, their continuing education management system is learner-driven (the user choosing her own education options), rather than top-down, like in corporate LMS market where management prescribes training for employees.

- InReach learning portals, serving self-selecting users, are basically content catalogs, and the experience searching or browsing the content is comparable to the online shopping experience we’ve come to expect from Amazon.com, eBay, and the like.
- InReach believes all an association’s educational options—online and off—should be available in one place, and the system elegantly supports managing and displaying the same topic in multiple formats. Whereas others systems we’ve seen tend to handle different formats (classroom and recorded Webinar) by creating two different activities, or courses, InReach CEMS supports the creation of a single activity that is associated with multiple delivery options.
- InReach stresses its customer service to its clients and their customers. Support for end users via telephone, e-mail, and live chat is standard practice. The company offers high-end production services for audiocasts, telephone seminars, Webinars, and Webcasts (and can capture not just talking heads but audience participation) and turns recordings around quickly (post-production is usually complete 24 to 48 hours after an event is captured).
- InReach’s relies exclusively on revenue-share pricing model, and it offers clients the ability to share their content with other InReach clients—the association that created the content and the one that sells it to their learners split the profits.
- As you might expect from a company whose business model is based on revenue-sharing, InReach CEMS offers full-featured e-commerce.
- InReach-managed programs can be tracked minute by minute, user by user, and can make use of attention checks and unique letter code streams to comply with requirements around issuing credit.
- InReach CEMS is mobile-ready—on tablets, the platform and content look the same to learners as on a laptop, and on smart phones, to accommodate the smaller screen size, learners choose to view either slides or video (but not both).

We see InReach as a particularly good fit for associations that are open to the revenue-share model, that want to take advantage of InReach’s production service options, and that work in the financial services, healthcare, and legal fields—where the company has deep experience with the relevant accrediting bodies and related requirements and where the associations stand to benefit most from the added distribution channel being part of the InReach ecosystem offers.

General Company Information

1. When was the company founded?
1999
2. How many employees does the company currently have?
35
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
The InReach hosted Continuing Education Management System and services: InReach develops and manages everything an organization needs to create a top-shelf online CE offering — from end-user support and leading-edge software to a vast array of computer applications and a sophisticated content distribution network.
5. Provide the company's contact information.
*5700 S Mopac, Suite C310
Austin, Texas 78749
USA
Info@inreachce.com
(512) 381-1570*
6. Provide the URL for the company's Web site.
http://www.inreachce.com
7. Provide any other information or notes relevant to the "General Company Information" section.
Designed to manage the entire lifecycle of Continuing Education content, the InReach system operates transparently — and effortlessly — behind an organization's web site, enabling them to maintain brand identity and a direct relationship with their audience.
4. Briefly describe the upgrade cycles for the LMS.
InReach uses an Agile development methodology and releases software updates quarterly.
5. How many associations use this LMS?
150
6. How many organizations in total use this LMS, including associations?
200
7. How many end users are registered in the single largest client implementation hosted by the company?
225,000
8. How many end users are registered in the single largest client implementation hosted by the client?
Not applicable
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
3,000,000
10. Briefly describe the value proposition for this LMS as it applies to associations.
The InReach continuing education management system (CEMS) was designed specifically to handle accredited continuing education content for professional associations.
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
5%
 - 500 to 2,499 registered end users
5%
 - 2,500 to 4,999 registered end users
5%
 - 5,000 to 9,999 registered end users
45%
 - 10,000 to 24,999 registered end users
25%
 - 25,000 or more registered end users
15%

General LMS Information

1. What is the name of the LMS product?
InReach Continuing Education Management System (CEMS)
2. Provide the product version described in this survey response.
InReach 2012
3. When was the first version of the LMS initially released?
1/1/2000

12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
- 1,000 or less
2%
 - 1,001 to 5,000
10%
 - 5,001 to 10,000
20%
 - 10,001 to 25,000
40%
 - 25,001 to 50,000
20%
 - 50,001 to 100,000
5%
 - More than 100,000
3%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
-
- Less than 100
 - 101 to 200
 - 201 to 500
 - 501 to 1,000
 - 1,001 to 5,000
 - More than 5,000
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
Legal, healthcare, financial services (banking, accounting). The vast majority of our customers (over 95%) are professional associations.
15. Please list the company's top *association* clients.
State Bar of California • Texas Medical Association • New York State Society of CPAs
16. Please list the company's other (non-association) top clients.
—
17. Provide a URL for more information about the LMS.
<http://www.inreachce.com/solutions/inreach-ce-management-system>
18. Provide any other information or notes relevant to the "General LMS Information" section.
<http://www.inreachce.com/solutions-overview>

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex	45
Typical	30
Simple	14
2. Briefly describe the implementation process.
Client services works with customer to determine scope. A launch schedule is created/agreed upon. Catalog development and production work ensue. Customer training one week prior to launch. Catalog is reviewed, goes live.
3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.
*Product management
Clients services
Operations/production
Professional services
Marketing*

4. Please specify the location (by time zone) of company personnel involved in implementation.

-5 UTC

5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.

Executive director

CE management

Webmaster/IT

6. Provide any other information or notes relevant to the "LMS Implementation" section.

The vast majority of the implementation falls to InReach. We work to ensure that the customer only needs to invest minimum time/effort.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

—

- 500
- 2,500
- 5,000
- 10,000
- 25,000
- Unlimited

2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of

registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

—

- 500
- 2,500
- 5,000
- 10,000
- 25,000
- Unlimited

3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

5. Briefly describe the pricing model for the LMS.

InReach's fundamental business model is based on a revenue sharing arrangement that minimizes our clients' initial capital outlay and reduces their financial risk. It also maximizes the potential of InReach's technology, services, and experience by aligning the interests of InReach with those of our clients. InReach's average client engagement is greater than eight years and we credit that highly valued distinction to the partnership orientation created by our business model. Simply put,

InReach and our clients succeed together. While InReach manages all manner of CE material, InReach's pricing model centers on the delivery of online programs. Typically, InReach retains a minority percentage of the revenue generated by our clients' webcasts, webinars, and audiocasts. InReach's revenue covers all technology development and management, as well as the services required to edit and deliver the program, including both client and end-user support. For in-person events and other CE material (e.g., CDs, DVDs, electronic documents, and publications), InReach has a nominal fixed rate per item to cover our cost of serving customers with all offline (i.e., phone-in, fax-in, and mail-in) registrations and transactions. InReach does not have recurring maintenance fees; however, customers must ensure a nominal monthly minimum (typically, about two to three program sales) to help InReach cover our ongoing expenses for technology development and maintenance, hosting, and customer service. Implementation is achieved for a one-time start-up fee of \$995. For that initial commitment, InReach will perform all of the work required to put new clients' continuing education programs online, including:

- *Application and e-commerce setup*
- *Conversion of existing media*
- *Catalog and certificate branding and customization*
- *Content entry*
- *End-user support process setup*
- *Client site navigation assistance*
- *System training*

6. Briefly describe the payment schedule.
—
7. Briefly describe pricing for additional services.
—
8. Provide any other information or notes relevant to the "Pricing" section.
—

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating

system and database configurations supported?

Not applicable

2. Briefly describe the technical framework and code structure of the LMS.
InReach was developed based on Microsoft development tools including the .NET Framework and SQL Server.
3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.
The LMS supports a fully documented Application Programming Interface that is available through a SOAP-based web service.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
Scalability is a hallmark of the InReach service. InReach has hundreds of clients that serve millions of end-users across many industries. In addition to iconic commercial clients in the financial services industry, InReach's clients include 42 of the 50 state bar associations, all of the state banking associations, the marquee state accounting associations, and a large portion of the healthcare community. Membership at many of our largest clients exceeds a quarter of a million professionals with mandatory education requirements. With year-end accreditation periods being typical, the InReach service has reliably delivered millions of hours of education to thousands of simultaneous users and has hosted single events that exceed 28,000 participants. This scalability is achieved through state of the art technology and infrastructure. Our data center operations span multiple, independent facilities and our Content Delivery Network offers 16 domestic and 16 international points of presence. In addition to scalability, the architecture of InReach's data center and network operations provide reliability, redundancy, and performance. With the InReach system, clients enjoy access to all of the system's features, adding or subtracting functionality as requirements dictate using simple selections in the system's administrative interface.

5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
—
6. Provide any other information or notes relevant to the “Technology” section.
—

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
Internet Explorer 8.x or later on Vista
Internet Explorer 8.x or later on Windows XP
Firefox 3.x on Vista
Firefox 3.x on Windows XP
Safari 5.x or later on Mac OSX
Chrome on Vista or later
2. What are the technical requirements for an *administrator* to access the LMS?
Internet Explorer 8.x or later on Vista
Internet Explorer 8.x or later on Windows XP
Firefox 3.x on Vista
Firefox 3.x on Windows XP
Safari 5.x or later on Mac OSX
Chrome on Vista or later
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the “System Requirements” section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
25
2. Briefly describe the typical types of integration for the LMS.

3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
API based on SOAP-based web services.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
—
5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect
 - Elluminate
 - Genesys
 - GoToWebinar
 - Microsoft Live Meeting
 - ReadyTalk
 - WebEx
 - Completely custom (non-commercial) Webinar system ✓
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify)
6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
 - Aptify (Aptify) ✓
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid)
 - CRM for Members (ProTech)
 - iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap)
 - netFORUM (Avecetra) ✓
 - Office Manager (internet4associations)
 - Personify (TMA Resources)
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS
 - The LMS has never been integrated with an AMS.
 - Other (please specify)

7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?

- ACGI CMS Anywhere
- BrowserCMS
- DotNetNuke
- Drupal
- Ektron ✓
- Joomla!
- Microsoft SharePoint Server
- Results Direct CMSPlus
- Completely custom (non-commercial) CMS
- The LMS has never been integrated with a CMS.
- Other (please specify)

8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.

No

9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.

Yes. —

10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.

—

11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.

Yes. —

12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.

Yes. —

13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify

which content libraries.

Yes. The InReach system has its own content library.

14. Provide any other information or notes relevant to the “Integration and Interoperability” section.

—

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?

- AICC
- IMS Global Learning Consortium
- Medbiquitous
- SCORM 1.1
- SCORM 1.2
- SCORM 2004
- Section 508
- The LMS does not produce content that conforms to any of these guidelines or standards. ✓
- Other (please specify)

2. Can the LMS play content that conforms to guidelines or standards?

—

- AICC
- IMS Global Learning Consortium
- Medbiquitous
- SCORM 1.1
- SCORM 1.2
- SCORM 2004
- The LMS does not play content that conforms to any of these guidelines or standards. ✓
- Other (please specify)

3. Provide any other information or notes relevant to the “Standards and Guidelines” section.

InReach does not currently support AICC or SCORM, but support for these standards is currently in development. InReach does, however, produce all of its content in industry-standard formats.

Hosting

1. Is the LMS available as a *company-hosted* solution?
Yes
2. How many LMS installations are hosted by the *company*?
210
3. Is the LMS available as a *client-hosted* solution?
No
4. How many LMS installations are hosted by the *client*?
Not applicable
5. How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner ✓
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
6. If the company's LMS hosting is provided by a partner or partners, please list the name(s).
Rackspace.
7. Briefly describe the company's preferred or recommended hosting option.
Not applicable
8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
System downtime is for planned maintenance only. Maintenance is typically scheduled for early mornings on Saturday or Sunday was system usage is limited or non-existent. These maintenance outages are scheduled and customers are notified in advance.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing ✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations

10. Provide any other information or notes relevant to the "Hosting" section.
—

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes
2. Can end users specify their preferred language (which may differ from the default site language)?
No
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Not applicable
4. Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
Yes
6. Provide any other information or notes relevant to the "Personalization" section.
—

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
Yes. The look and feel are automatically customized based on the device the end user accesses from, but the branding remains consistent with the InReach customer's brand/ the brand of the association providing the CE to the end-user.

2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).
Yes. —
3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.
No
4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.
Yes. —
5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
No
6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.
Yes. —
7. Provide any other information or notes relevant to the “Interface Configuration” section.
—

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
No
2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
No
3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
No
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
No
5. Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes
6. In how many countries has the LMS been implemented for clients?
2
7. Please list the countries where the LMS has been implemented for a client.
US & Canada.
8. In how many languages has the LMS been implemented for clients?
1
9. Please list the languages in which the LMS has been implemented for a client.
English.
10. How many language packs are available for the *end-user* view of the LMS?
0
11. Please list the languages for which a language pack is available for the *end-user* view.
Not applicable
12. How many language packs are available for the *administrator* view of the LMS?
0
13. Please list the languages for which a language pack is available for the *administrator* view.
Not applicable

Browse by
Delivery Type ▾

Search...



Hello, **Guest**
Sign in ▾

0
Cart

Featured Products

Prescribing for Pain: Expectations of Florida's Medical Licensing Boards

Florida Specific CME 1 Credits

Documentation and Procedures for Effective Pain Management

Pain Management 1 Credits

Domestic Violence with a Special Focus on Human Trafficking

Public Health 2 Credits

Prevention of Medical Errors

Practice Operations 2 Credits



Available As:



Presented by the Chair of the Florida Board of Medicine for Florida-licensed physicians, this course addresses the laws and rules established for allopathic and osteopathic physicians who prescribe controlled substances, particularly for chronic, non-malignant pain.

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Announcement

Welcome to FMA's new education center. If it's your first time to visit this site and you are a FMA member, simply login as a **returning customer**. Enter the e-mail address used for the FMA website in the login field and your last name (Case-sensitive. e.g. Smith) as your password. Then, take advantage of FMA member discounts for all of our courses.

If you aren't a FMA member, please register as a new customer.

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- | | |
|--|---|
| Billing (6) | Legal (18) |
| Cancer (9) | Medicare (3) |
| Coding (2) | Non-Physician Practitioners (1) |
| Collections (1) | Pain Management (9) |
| Communications (6) | Physician Health (15) |
| Continuing Education (4) | Practice Management (10) |
| Documentation (2) | Practice Operations (5) |
| Education (3) | Primary Care (18) |
| EMR/EHR (1) | Public Health (11) |
| Ethics (41) | Risk Management (7) |
| Florida Specific CME (5) | Substance Abuse (10) |
| Fraud & Abuse Compliance (5) | Technology (2) |
| Leadership (10) | Tobacco Cessation (2) |

Contact us at (877) 880-1335
Email us at support@inreachce.com



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A branded InReach site for an association

14. Provide any other information or notes relevant to the “Internationalization and Localization” section.

—

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog
 - Search across multiple catalogs
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for other end users
 - The LMS does not support search by end users.
 - Other (please specify)
3. What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for end users ✓
 - Search for other administrators

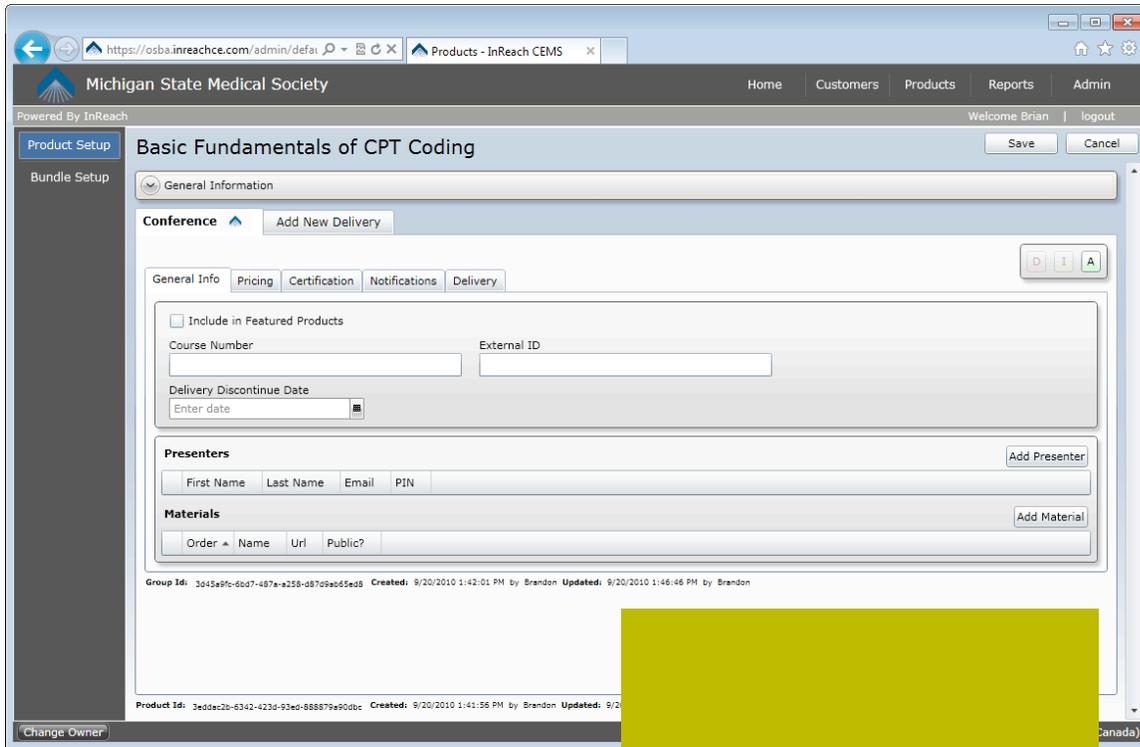
- The LMS does not support search by administrators.
- Other (please specify)

4. Provide any other information or notes relevant to the “Search and Catalogs” section.

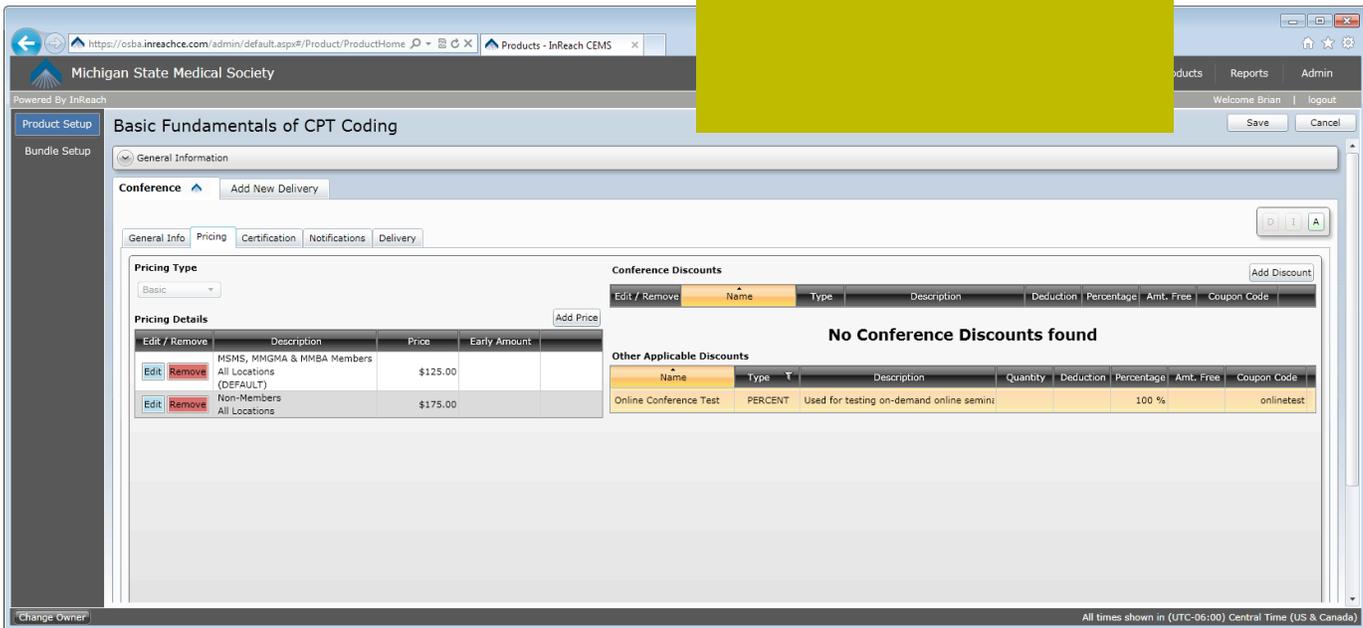
—

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education ✓
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)



Administrator views of creating a product in InReach



3. Does the LMS provide the ability to author learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
—
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
—
5. Does the LMS support offline authoring of learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
—
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Check in/check out functionality
Standard
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Unavailable
- Ability to monitor progress on tasks
Unavailable
- Ability to add internal comments (viewable only by other administrators) to content
Standard
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
8. Can the LMS generate printer-friendly content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
—
9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
—
10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓

11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
 - Browser-delivered online content ✓
 - Downloadable version ✓
 - CD or DVD ✓
 - HTML ✓
 - SWF
 - PDF ✓
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
InReach course description and submission form.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
—

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard

- Waitlisting
Standard
 - Personnel management (for scheduling instructors and facilitators)
—
 - Facility management (for scheduling rooms)
—
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
—
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
—
2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
Yes. —
 3. Provide any other information or notes relevant to the “In-person, Place-based Courses” section.
—

Webinars

1. Does the LMS provide integrated Webinar functionality?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar

software (e.g., single sign-on).

2. Briefly describe the company’s preferred or recommended Webinar software.
InReach webinar technology.
3. Provide any other information or notes relevant to the “Webinars” section.
—

Registration

1. How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
4. Does the LMS provide self-serve password recovery help for end users?
Yes
5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
7. Can the fields for end user profiles be added, edited, and deleted?
Yes
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes

9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?

No

10. Provide any other information or notes relevant to the “Registration” section.

—

Enrollment

1. How can end users be enrolled in courses in the LMS?
- By self-enrollment ✓
 - By enrollment code or key
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?

Yes

3. How administrators configure enrollment options?

- Sitewide ✓
- At the catalog level ✓
- By course group ✓
- On a course-by-course basis ✓
- On an end user-by-end user basis ✓
- Other (please specify) ✓

Member vs non member.

4. Can enrollments occur based on end user-specific criteria?

-
- The end user’s role in the system
- The end user’s score on an assessment
- The end user’s completion of prerequisites for a particular course
- The LMS does not support enrollment based on end user-specific criteria.
- Other (please specify)

5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?

Yes

6. Provide any other information or notes relevant to the “Enrollment” section.

—

The screenshot shows the InReach LMS administrator interface. The main content area displays a list of 403 results for a product. A modal window titled "Registrants" is open, showing a table of registrants for the product "Alternative and Supplementary Will Provisions".

Registrant	Member ID	Web Minutes	Completion Date	Price Description	Total Paid	Status
Presler, Timothy	0006715	58	3/28/2011	Non-Member Price	\$65.00	Sold
Varnese, John	0044176	58	4/30/2011	OSBA Member Price	\$45.00	Sold

An administrator view of an enrollment list for an InReach product

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?

Yes

2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?

Yes

3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement)
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload

- By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)

6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?

Not applicable

- By the user claiming the credit
 - By the user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?

Yes
 8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
 - Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
 9. Does the LMS help *end users* track their own continuing education or certification requirements?

- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline) ✓
 - No
 - Other (please specify) ✓
Automatic notification is in the works.
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
Yes. They can also print receipts, materials, certificates of completion, earned credit information.
14. How many clients use the LMS to manage continuing education or certification?
64
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE) ✓
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify)
16. Provide any other information or notes relevant to the "Managing Continuing Education and Certification" section.
—

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course)
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another may only require users to achieve a 70% to pass)?
Yes

4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
- Yes, after an end user submits her answer to each question
 - Yes, after an end user completes the entire assessment
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment) ✓
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
- Per question
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option
 - Based on which distracter the end user selected
 - Per assessment ✓
 - Based on the end user's overall performance on the assessment
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
- Yes*
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
- No*
8. Does the LMS automatically link assessment data to the performance reports available in the system?
- Yes*
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
- No*
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
- Yes*
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
-
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
-
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
- Yes*
15. Does the LMS provide for automatic randomization of assessments?
-
- By randomizing which questions are included in the assessment
 - By randomizing the order in which questions are presented
 - By randomizing the order in which distracters, or answer options, are presented
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
-
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of

- time from the start of the assessment (e.g., 20 minutes)
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013)
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment)
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order)
 - Hotspot questions (where users must select the correct area of a graphic)
 - Drag-and-drop questions
 - Other (please specify)
18. Provide any other information or notes relevant to the “Assessments” section.
- InReach offers feedback/answer justifications at the end of an evaluation. If the participant does not pass the evaluation, they can take the test again.*

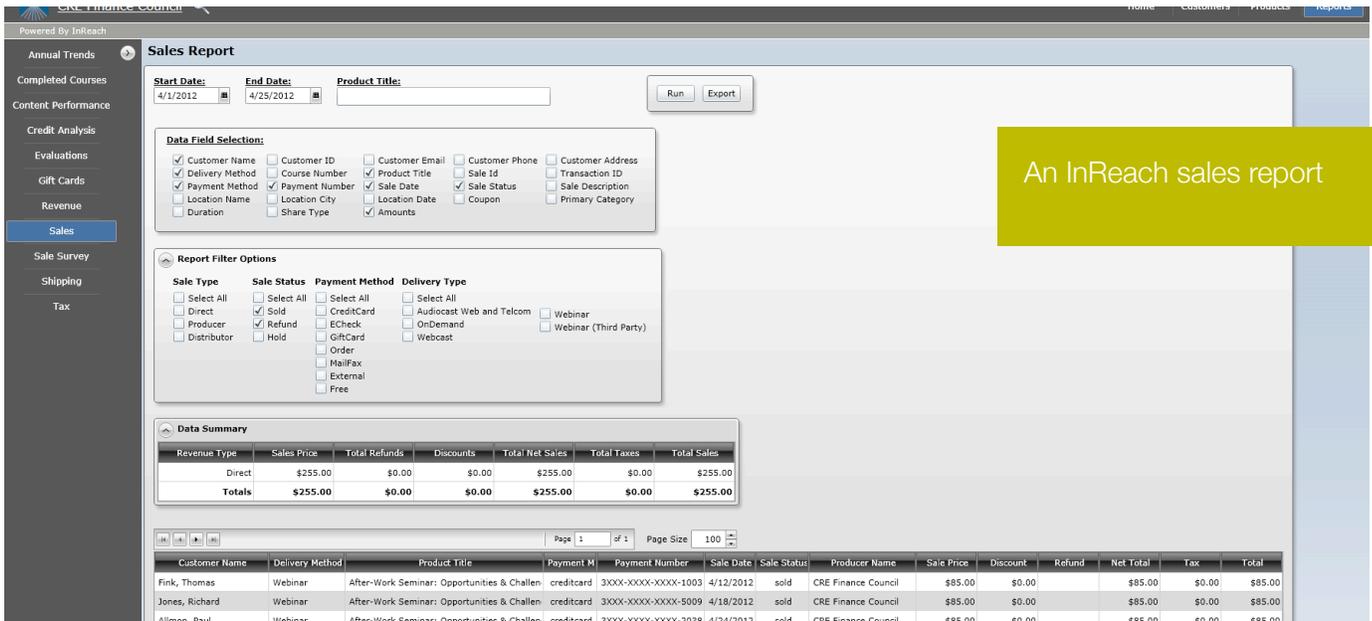
Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course)
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
No
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
—
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
—
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
—
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013)
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated)
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)

10. Which types of questions does the LMS make available for use in evaluations?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row)
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales)
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields
 - Date fields
 - Time fields
 - Demographic information
 - Other (please specify)
11. Provide any other information or notes relevant to the “Evaluations” section.
-

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
—
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
—
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports ✓
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
5. How are the LMS reports made available?
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users’ profiles or store additional metadata on courses) ✓
 - Other (please specify)
5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
11
7. List and briefly describe the standard, pre-configured reports available in the LMS.
Annual trends, completed courses, content performance, credit analysis, Evaluations (date range, status, delivery type), gift card usage, revenue, sales (wide variety of sales information), sales survey, shipping report, tax report.
8. Briefly describe the process for creating ad-hoc reports in the LMS.
—
9. How many custom reports does the company typically develop for a client implementation of the LMS?
—
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
Varies.
11. Provide any other information or notes relevant to the “Reporting” section.
The InReach Continuing Education Management System offers a broad range of reporting tools from real-time attendance lists and program performance metrics to survey results and revenue generated from the resale of your content.



Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters,

departments, or programs) from a single implementation?

- The LMS does not provide for multiple sites from a single client implementation.
- Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
- Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
- Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish).
- Each site in a single client implementation can draw from the same master list of

courses (to avoid the need to recreate them in each site). ✓

- Each site in a single client implementation can have its own set of customized reports. ✓
- Other (please specify)

2. How many clients have a multiple-site implementation of the LMS?

5

3. On average, how many sites are part of a client's multiple-site implementation of the LMS?

30

4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.

InReach clients typically have single sites that include cross site functionality allowing InReach clients to share, and profit from resources.

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- End user-to-end user e-mail

- End user-to-administrator e-mail

Standard

- Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
—
 - Live chats (for multiple end users)
—
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Standard: live chat to support.
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Ability to organize end users in groups for collaborative work
Unavailable
 - Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Unavailable
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard
 - Live voice-over-IP
Standard
 - Virtual whiteboard
—
 - Virtual presentations (e.g., PowerPoint-driven)
Standard
 - Screencasting
Standard
 - Application-sharing
—

- Ability to associate a wiki with a course
—
 - Single-point Web camera capability
Standard
 - Multiple-point Web camera capability
Standard
 - Networking (e.g., ability for end users to connect with one another)
Unavailable
 - Ability for each registered end user to have a blog
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
—

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Standard
 - Automatically handles payment by credit card (no manual intervention needed)
Standard

- Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles sales tax, including variations based on the state or region
Standard
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Standard
 - Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Standard
 - Automatically maintains order status that can be checked by end user
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
 - Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net ✓
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify)

5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
InReach.
7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
Yes
8. Provide any other information or notes relevant to the "E-commerce" section.
The InReach Continuing Education Management System provides a sophisticated shopping cart with multiple options for promoting content. The InReach system securely supports all online transactions, while services team handles users' offline transactions (i.e., mail-in, fax-in, and POs).

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Live telephone support for end users
Standard
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Standard
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Unavailable
 - Self-serve, searchable knowledge base for administrators
Standard
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Live Chat.
 - Self-serve online training (e.g., tutorials) for end users
Unavailable
 - Self-serve online training (e.g., tutorials) for administrators
Semi-standard
 - Scheduled online training (e.g., Webinars) for end users
Unavailable
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Semi-standard
 - Scheduled in-person training at client offices for administrators
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Unavailable
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
The system is intuitive for end-users, rarely requires any training.
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
24/7.
4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
24/7.

5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
24/7.
 6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
24/7.
 7. Briefly describe the company's typical ongoing communication with its LMS clients.
Regular phone conversations, email, site visits.
 8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
Our clients maintain communication with their end-users--except in the case of support. InReach provides all technical support to our client's end-users.
 9. Provide any other information or notes relevant to the "Support and Training" section.
—
5. Please specify the location (by time zone) of personnel involved in custom programming.
-5 UTC
 6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - Other (please specify)
 7. Please specify the location (by time zone) of personnel involved in custom content development.
-6 UTC
 8. Provide any other information or notes relevant to the "Custom Programming and Content Development" section.
InReach provides production services for audiocasting, webinars, and webcasts. InReach provides capture and broadcast services and does all post-event editing, digitization, and encoding to produce a variety of on-demand programming.

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
—
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
—
4. Briefly describe the process for used for planning and implementing custom programming work.
—

TOPYX

Interactyx Limited

Interactyx

3461 Bonita Bay Blvd., Suite 207
Bonita Springs, FL 34134

888.575.2266

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<http://www.interactyx.com>

LMS Version: 3.06

Value proposition: *TOPYX is an affordable eLearning 2.0 Software as a Service (SaaS) solution with integrated social learning, mobile learning and eCommerce functionality fulfilling the modern, social eLearning needs for association members. We wrap internal and external collaboration tools around the training platform, subject areas and courses plus. Association course developers have access to an embedded course authoring tool with an LCMS content library to leverage existing assets in new course development and material maintenance.*

Top clients (associations): *North American State Boaters Law Administrators • National 4-H Foundation • Rotary International • Big Brothers Big Sisters • National Association of Social Workers • National Homeowners Association - Minnesota • Highway Safety Research Center*

Top clients (non-associations): *Morton Salt • McAfee, Inc. • Godfather's Pizza • Girl Scout Cookies • Kubota Tractor • Edwards Lifesciences • Sealed Air Corporation • Tupperware Brands • Baylor University • University of Chicago • Lincoln Technical Institute*

URL for more information about the LMS:
<http://www.interactyx.com>

Three-year pricing: \$58,500

Hosting: *By company only*

INTERACTYX

TOPYX®



Our Take on TOPYX

Some Highlights

TOPYX, billed as a “social LMS,” blends features of a traditional LMS with social learning resources, including Web conferencing, chat, calendaring, polls, blogs, shout boxes, and pictures. TOPYX supports social learning from the site level down to the individual course level.

- TOPYX offers social networking plug-ins for Twitter, Facebook, LinkedIn, etc.
- If m-learning is important for your audiences, TOPYX can deliver content to most mobile devices, and Interactyx continues to add to the platform’s mobile abilities—for example, the company plans to offer delivery via text message for automatic notifications from TOPYX in the first quarter of 2013.
- Interactyx is experienced in single sign-on. SSO integration with an AMS can range from simple—where a user signed into the association management system is passed to the LMS without having to sign in again—to complex—where the catalog in TOPYX is suppressed in favor of the AMS interface.
- TOPYX costs \$19,500 per year, regardless of other parameters (like number of users or bandwidth usage), making the platform the least expensive company-hosted system profiled in this report for unlimited users. What’s more, for organizations that don’t have staff to administer the LMS, Interactyx can play that role—admin services cost \$9,500 per year.
- Fourteen language packs are available for TOPYX, and other languages—and any left-to-right or up-and-down language can be added.
- Since our last report, TOPYX has added the management of credits and certifications, filling in the one area where we’d felt the system was weak.
- While Interactyx can do custom work for clients, the company philosophy is to try to develop even requested features in a universal way so they can be added to the base code to benefit all clients. Interactyx actively solicits client participation in the product road map. Badges are planned for 2013, as is work with Tin Can.

Although Interactyx can’t claim deep experience with associations, it has a growing association client list. Given the platform’s full features and affordable, no-surprises pricing, associations with a focus on social learning would be remiss not to consider TOPYX.

General Company Information

1. When was the company founded?
1995
2. How many employees does the company currently have?
15
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
TOPYX® is an award-winning social learning management system (LMS), software-as-a-service (SaaS) eLearning solution which engages learners and provides collaborative learning environments for businesses, associations, non-profits and eCommerce needs of any size organization throughout the world. We have integrated best-in-class social learning tools into easy-to-use LMS functionality to create an engaging, collaborative online learning environment. We believe that your social learning system needs to be inclusive. With TOPYX, there are no per user fees or fees for usage, no matter how many users you may have. Visit our website <http://interactyx.com> to see how TOPYX can help you reach your goals.
5. Provide the company's contact information.
*3461 Bonita Bay Blvd., Suite 207
Bonita Springs, FL 34134
USA
jodi.harrison@interactyx.com
888 575-2266*
6. Provide the URL for the company's Web site.
<http://www.interactyx.com>
7. Provide any other information or notes relevant to the "General Company Information" section.
Interactyx Limited is a global eLearning software company providing engaging and interactive learning experiences to learners, businesses, academic departments, associations and nonprofit organizations of any size. Since 1995, Interactyx has worked with educational programs to develop engaging learning management solutions. Interactyx, the developer

of TOPYX, is at the forefront of developing eLearning and social learning management system solutions that engage learners and enhance collaborative learning environments. TOPYX has gained acceptance as an innovative, affordable solution to deliver a complete eLearning software solution meeting the needs of today's learner that is the best value in social learning software.

General LMS Information

1. What is the name of the LMS product?
TOPYX
2. Provide the product version described in this survey response.
3.06
3. When was the first version of the LMS initially released?
1/5/2009
4. Briefly describe the upgrade cycles for the LMS.
Quarterly
5. How many associations use this LMS?
10
6. How many organizations in total use this LMS, including associations?
150
7. How many end users are registered in the single largest client implementation *hosted by the company*?
120,000
8. How many end users are registered in the single largest client implementation *hosted by the client*?
Not applicable
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
500,000
10. Briefly describe the value proposition for this LMS as it applies to associations.
TOPYX is an affordable eLearning 2.0 Software as a Service (SaaS) solution with integrated social learning, mobile learning and eCommerce

functionality fulfilling the modern, social eLearning needs for association members. We wrap internal and external collaboration tools around the training platform, subject areas and courses plus. Association course developers have access to an embedded course authoring tool with an LCMS content library to leverage existing assets in new course development and material maintenance.

11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
- 499 or fewer registered end users
5%
 - 500 to 2,499 registered end users
35%
 - 2,500 to 4,999 registered end users
30%
 - 5,000 to 9,999 registered end users
20%
 - 10,000 to 24,999 registered end users
5%
 - 25,000 or more registered end users
5%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
- 1,000 or less
0%
 - 1,001 to 5,000
50%
 - 5,001 to 10,000
0%
 - 10,001 to 25,000
0%
 - 25,001 to 50,000
0%
 - 50,001 to 100,000
0%
 - More than 100,000
50%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
- Less than 100
50%
 - 101 to 200
0%
 - 201 to 500
0%
 - 501 to 1,000
0%
 - 1,001 to 5,000
0%
 - More than 5,000
50%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
-
15. Please list the company's top *association* clients.
- North American State Boaters Law Administrators • National 4-H Foundation • Rotary International • Big Brothers Big Sisters • National Association of Social Workers • National Homeowners Association - Minnesota • Highway Safety Research Center*
16. Please list the company's other (non-association) top clients.
- Morton Salt • McAfee, Inc. • Godfather's Pizza • Girl Scout Cookies • Kubota Tractor • Edwards Lifesciences • Sealed Air Corporation • Tupperware Brands • Baylor University • University of Chicago • Lincoln Technical Institute*
17. Provide a URL for more information about the LMS.
- <http://www.interactyx.com> – a demo site can also be provided.*
18. Provide any other information or notes relevant to the "General LMS Information" section.
- TOPYX social LMS has been recognized with some of the highest social learning and learning management innovation awards in the industry:*

- *Elearning! Magazine - Best of Elearning! Award Winner for 2011, 2010, and 2009*
- *Brandon Hall's Multi-Gold Winner for Excellence in Technology*
- *Brandon Hall and CLO Magazine - Named One of the Top Five Emerging LMS Vendors*
- *ASTD International Conference & Exposition 2010 - Editor's Choice*
- *Southwest Florida Regional Technology Partnership's winner of the fourth annual technology awards in the "Innovention" category*

- *Project planning and new client site is created upon the execution of the subscription.*
- *Kick off meeting is scheduled to do introductions, discuss the process, requirements and customer service.*
- *Kick off meetings have all members of the team present from both sides; it is determined at that time who meets when along the schedule.*
- *Weekly status meetings are scheduled and conducted until the completion of the project or for as long as the client wishes.*
- *Two four hour "train-the-trainer" sessions are included in the subscription price.*
- *The final two weeks of the implementation focus on usability and acceptance testing.*

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

180

Typical

49

Simple

21

2. Briefly describe the implementation process. *The implementation methodology is focused teaching the Association team to become self-sufficient by participation and contributing on all aspects of the project. Our implementation managers are also your on-going customer service representative, so they have intimate knowledge of your configuration to quickly address issues. Project Management Approach:*

3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.
 - *New customer - Sales team and possibly the development team*
 - *Kick-off - sales team, implementation team, possibly the development team*
 - *On-going day to day - Implementation team, customer service team, sales team and possibly the development team*
4. Please specify the location (by time zone) of company personnel involved in implementation. *-9, -8, -7, -6, -5, and 0 UTC*
5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
 - *Program Manager / Administrator*
 - *Functional SME's/instructors as needed*
 - *Security Admin as needed*
 - *Marketing contact for branding*
6. Provide any other information or notes relevant to the "LMS Implementation" section.

—

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$19,500
 - 2,500
\$19,500
 - 5,000
\$19,500
 - 10,000
\$19,500
 - 25,000
\$19,500
 - Unlimited
\$19,500
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$58,500
 - 2,500
\$58,500
 - 5,000
\$58,500
 - 10,000
\$58,500
 - 25,000
\$58,500
 - Unlimited
\$58,500
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
Not applicable
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
Not applicable
5. Briefly describe the pricing model for the LMS.
TOPYX is sold as a software-as-a-service subscription model with an annual unlimited user instance at an affordable fixed price All social networking components within its communities are included in the annual subscription. Extra features include:
 - *eCommerce*
 - *Languages*
 - *SSO set-up*
 - *White Labeling*
 - *Extra skins - TOPYX comes with one skin*

6. Briefly describe the payment schedule.
The payment schedule is a pre-paid annual subscription with initial payment due at contract signing and annual renewal is due on the anniversary date of the subscription. Non-profit pricing is available. Multi-year discounts and price projects are also available.
7. Briefly describe pricing for additional services.
Additional TOPYX features will be offered on an annual subscription basis, such as virtual classroom and certification modules. Any custom programming is charged at \$1,000 per day. There is no additional charge for customer support.
8. Provide any other information or notes relevant to the “Pricing” section.
Implementation services are included in price of the annual subscription.

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Not applicable
2. Briefly describe the technical framework and code structure of the LMS.
The technical framework is mainly Microsoft based with IIS 6.0, MS SQL Server DB 2008, ASP.Net and PHP. PHP is the main non-Microsoft technology that is utilized in TOPYX back-end infrastructure. The entire front-end user interface is developed in VB ASP.NET.
3. Briefly describe the LMS’s ability to share data for the purposes of migration and integration.
All LMS data can be shared via a XML or CSV file extracts. All reporting information is available via Excel spreadsheet, XML data dumps or API. TOPYX supports Single Sign-on via a standard script that securely passes data parameters to authenticate users from source system.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
TOPYX has no limits to number of users or

content in the system. We are continually evaluating the capacity of our infrastructure with regard to the demands being placed on the system. We upgrade the system whenever it is appropriate.

5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
TOPYX has no restrictions.
6. Provide any other information or notes relevant to the “Technology” section.
—

System Requirements

1. What are the technical requirements for an end user to access the LMS?
As a hosted SaaS solution, TOPYX only requires a browser to use and manage the system. It is recommended that all users and administrators access TOPYX with a high-speed internet connection and up-to-date browser - Internet Explorer 7 or above, Firefox 2.x or above, Safari and Chrome are supported. The minimum requirements are as follows:
 - *For Windows: Intel® Pentium® II 450MHz, AMD Athlon™ 600MHz or faster processor (or equivalent); 128MB of RAM; recommended 128MB of VRAM*
 - *For Macintosh: PowerPC® G3 500MHz or faster processor, Intel Core™ Duo 1.33GHz or faster processor; 128MB of RAM; recommended 128MB VRAM*
 - *For Linux: Modern processor (800MHz or faster), 512MB of RAM, 128MB of graphics memory; recommended 128MB VRAM**Depending on the type of content uploaded to TOPYX, the users might require additional software to be able to view the content (e.g. Microsoft Word, a media player for movies, Flash player etc.).*
2. What are the technical requirements for an administrator to access the LMS?
As a hosted SaaS solution, TOPYX only requires a browser to use and manage the system. It is recommended that all users and administrators

access TOPYX with a high-speed internet connection and up-to-date browser - Internet Explorer 7 or above, Firefox 2.x or above, Safari and Chrome are supported. The minimum requirements are as follows:

- For Windows: Intel® Pentium® II 450MHz, AMD Athlon™ 600MHz or faster processor (or equivalent); 128MB of RAM; recommended 128MB of VRAM
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- For Linux: Modern processor (800MHz or faster), 512MB of RAM, 128MB of graphics memory; recommended 128MB VRAM

Depending on the type of content uploaded to TOPYX, the users might require additional software to be able to view the content (e.g. Microsoft Word, a media player for movies, Flash player etc.).

3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the “System Requirements” section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
60%
2. Briefly describe the typical types of integration for the LMS.
The typical integration is with single sign-on integration which is estimated to be completed within standard five implementation days. Examples include:
 - *Active directory*

- *Membership software*
 - *CRM*
 - *Reporting tools*
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
HTTP / HTTPS.
 4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
1) Analyze. 2) Design. 3) Integrate. 4) Test. 5) Deploy.
 5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect ✓
 - Elluminate
 - Genesys
 - GoToWebinar ✓
 - Microsoft Live Meeting ✓
 - ReadyTalk
 - WebEx ✓
 - Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify) ✓
TOPYX has a standard integration to WiZiQ.
 6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
 - Aptify (Aptify)
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid) ✓
 - CRM for Members (ProTech)
 - iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscape)
 - netFORUM (Avecetra) ✓
 - Office Manager (internet4associations)
 - Personify (TMA Resources)
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)

- Completely custom (non-commercial) AMS ✓
 - The LMS has never been integrated with an AMS.
 - Other (please specify) ✓
I4A, Workday.
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
- ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server ✓
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS ✓
 - The LMS has never been integrated with a CMS.
 - Other (please specify)
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
- No*
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
- Yes. TOPYX has a proprietary e-commerce system as part of the solution. The embedded eCom engine and shopping cart all customized to your organization - major credit/debit cards and pay pal if needed.*
- PayPal
 - oGone
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
- Yes. Uduku is integrated within TOPYX. Adobe Presenter, Articulate, Camtasia, Captivate,*

Lectora, iSpring and Toolbook have all been tested. Advanced Distributed Learning Institute's (ADL) Academic Advanced Distributed Learning Co-Lab (AADLC) that TOPYX, after rigorous testing, successfully achieved certification in its latest edition - ADL's Sharable Content Object Reference Model (SCORM®) 2004 Learning Management System (LMS) Certification which represents a collection of standards and specifications for a comprehensive suite of eLearning capabilities that enable interoperability, accessibility and reusability of Web based learning content. No known limitations. The player is SCORM 1.2 and 2004 certified.

11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
- Yes. TOPYX is integrated with Quizzing functionality. Pre-test and post-tests can be added to any course within Course Management functionality. The Quizzing functionality supports multiple choice, short answer, fill in the blank and T/F question types. No other assessment tools have been integrated.*
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
- Yes. Survey Monkey and can do others. Plus TOPYX has a built in tool.*
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
- Yes. SkillSoft, MindLeaders, Element K, EJ4, Harvard Business, Cengage plus more.*
14. Provide any other information or notes relevant to the "Integration and Interoperability" section.
-

Standards and Guidelines

- Does the LMS produce content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards.
 - Other (please specify)
- Can the LMS play content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004 ✓

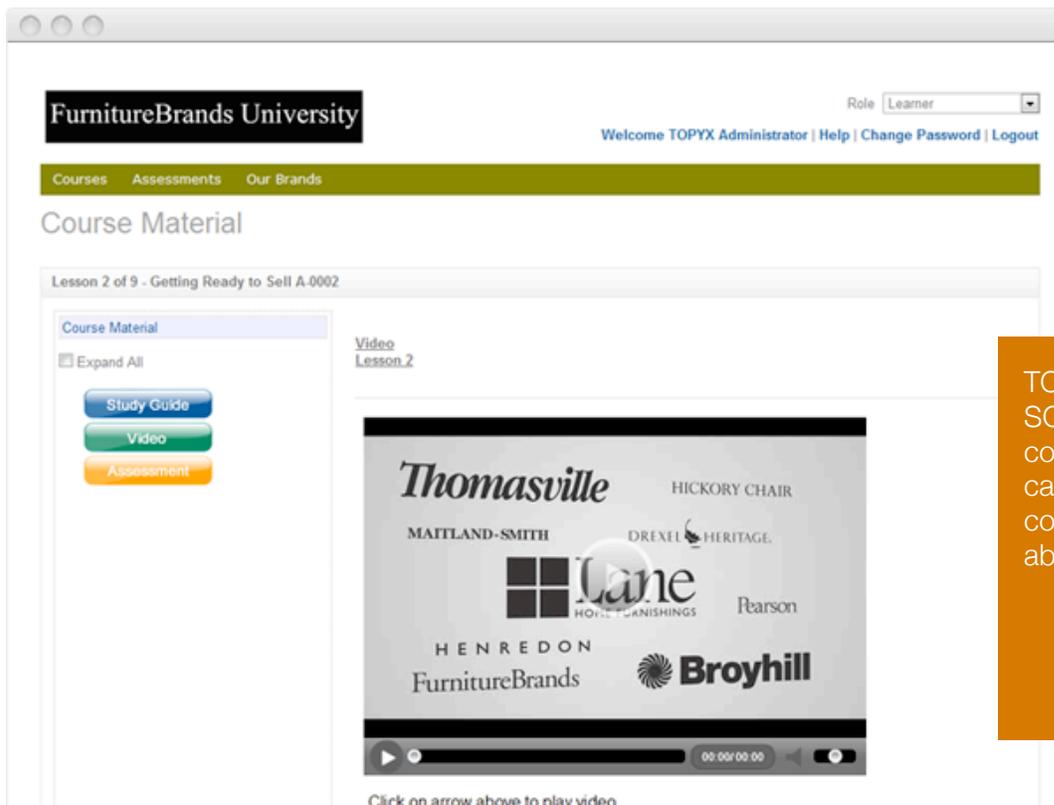
- The LMS does not play content that conforms to any of these guidelines or standards.
- Other (please specify)

- Provide any other information or notes relevant to the “Standards and Guidelines” section.

Course Material uploads are limited to Instructors and Administrators. Any document, audio, video or SCORM content can be added. Learners can post/share materials in communities.

Hosting

- Is the LMS available as a *company-hosted* solution?
Yes
- How many LMS installations are hosted by the *company*?
150
- Is the LMS available as a *client-hosted* solution?
No



TOPYX's SCORM-certified content player can deliver content in just about any format.

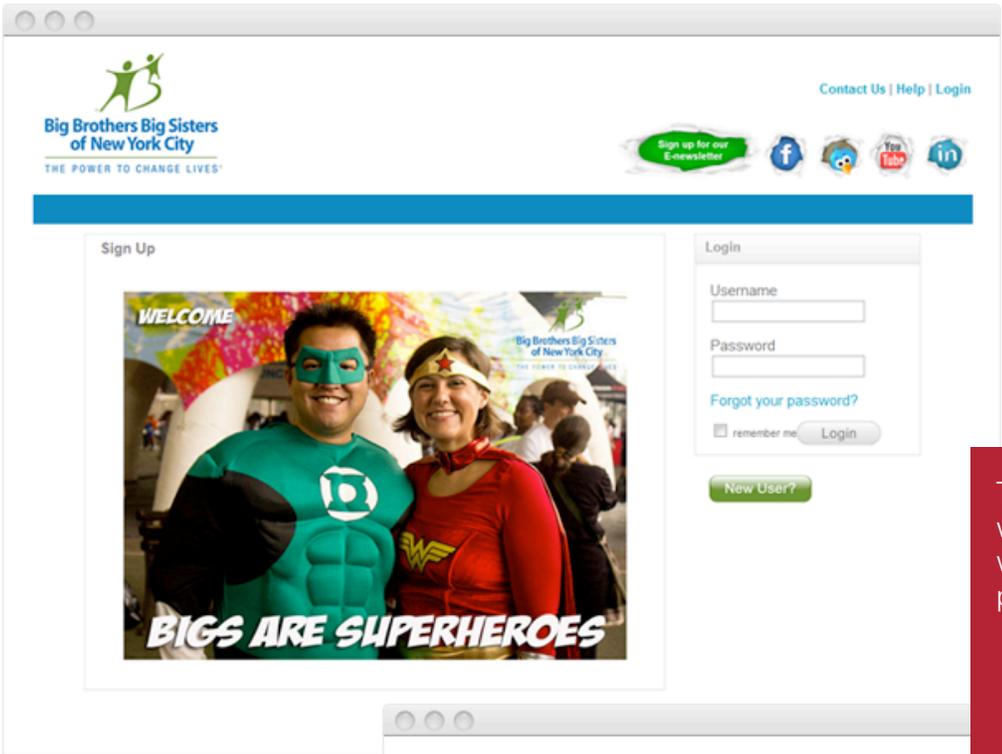
4. How many LMS installations are hosted by the *client*?
Not applicable
5. How does the company provide LMS hosting?
 - On servers managed directly by the company
 - On servers managed by a partner ✓
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
6. If the company's LMS hosting is provided by a partner or partners, please list the name (s).
Rackspace, Inc. - www.rackspace.com
7. Briefly describe the company's preferred or recommended hosting option.
Interactyx provides daily back-ups for all TOPYX customers through its Rackspace hosting agreements at its Plano, TX and London, England facilities. Each facility acts as the hot back-up for the other hosting facility.
8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
Our solution uptime has exceeded 99.7% availability since TOPYX inception in January, 2009.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing
 - Yes, when requested for an additional fee ✓
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the "Hosting" section.
All courses and course material can be staged within the hosted system until the point when an instructor or administrator decided to "Publish" the course or material for availability via the catalog.

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
No
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
Yes
6. Provide any other information or notes relevant to the "Personalization" section.
TOPYX is versatile enough to provide separate catalog, material and community views depending on training type and user type. This capability limits the learner's visibility to subject areas, courses and content based upon the User Group(s) that Administrators or Instructors can define and assign.

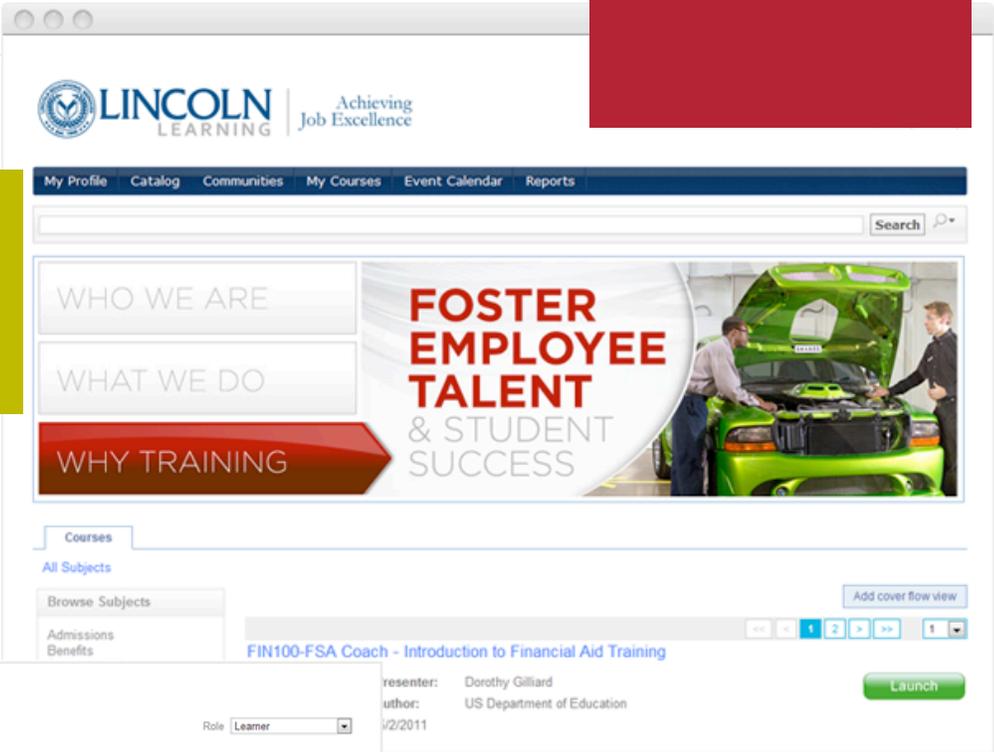
Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
Yes. Handled via cascading style sheets.



TOPYX allows you to welcome your learners with a customized log-in page.

TOPYX social LMS has an intuitive, simple, customizable interface.



Marketing tiles can be used throughout the TOPYX learning management system.

2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).

Yes. Admin, Managers and Instructors have unique views and reporting dashboards.

3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.

Yes. The end-user can customize their profile and add a description of their experience, pictures, and access to external social networking sites such as Linked In, Facebook, Twitter and Skype.

4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.

Yes. TOPYX is versatile enough to provide separate catalog, material and community views depending on training type and user type. This capability limits the learner's visibility to subject areas, courses and content based upon the User Group(s) that Administrators or Instructors can define and assign. The community levels and collaborative tools within the communities are configurable and can be enabled or disabled by the site administrator. TOPYX core collaboration offering provides Microsoft with an integrated suite of tools to enhance the members learning and knowledge sharing experience including:

- *Shoutout Box*
- *Members*
- *IM / Video Chat*
- *Events*
- *Forums*
- *Polls*
- *Blogs*
- *Articles*
- *Document Posting*

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS

customizable? If yes, briefly describe how the content for the *end-user* view is customized.

Yes. TOPYX supports seven levels of communities within its solution:

- *Site- available to all users for general purpose knowledge and collaboration*
- *Subject Matter- Private communities that require Moderator or Administrator approval for member admittance*
- *Program -Admitted to Community upon program registration or Moderator / Administrator Approval*
- *Course- Admitted to Community upon course registration or Moderator / Administrator Approval*
- *Content - Private communities require Moderator or Administrator approval for member admittance*
- *Learning Paths - Admitted to Community by Moderator / Administrator Approval*
- *User Group - Admitted to Community upon registration or Moderator / Administrator Approval*

6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.

Yes. Yes, the administrator can Moderate community members and content. In addition, they have access to all site reporting.

7. Provide any other information or notes relevant to the "Interface Configuration" section.

—

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term "student" with the term "learner" throughout the site)?

Yes

2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

Yes

3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?

Yes

4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?

No

5. Can administrators change the default time zone used for formatting dates and times in the LMS?

Yes

6. In how many countries has the LMS been implemented for clients?

10

7. Please list the countries where the LMS has been implemented for a client.

United States, United Kingdom, France, Canada, Netherlands, Saudi Arabia, Russia, Germany, Spain, Mexico.

8. In how many languages has the LMS been implemented for clients?

14

9. Please list the languages in which the LMS has been implemented for a client.

English (US), English (UK), Dutch, Spanish, French, Italian, German, Russian, Chinese, Polish, Korean, Japanese, Thai, Portuguese - plus we can add any left to right or up and down language.

10. How many language packs are available for the *end-user* view of the LMS?

14

11. Please list the languages for which a language pack is available for the *end-user* view.

Same as above. Language packs for all Left-Right

and Top-Bottom language are available through TOPYX.

12. How many language packs are available for the *administrator* view of the LMS?

14

13. Please list the languages for which a language pack is available for the *administrator* view.

Same as above. Language packs for all Left-Right and Top-Bottom language are available through TOPYX.

14. Provide any other information or notes relevant to the “Internationalization and Localization” section.

—

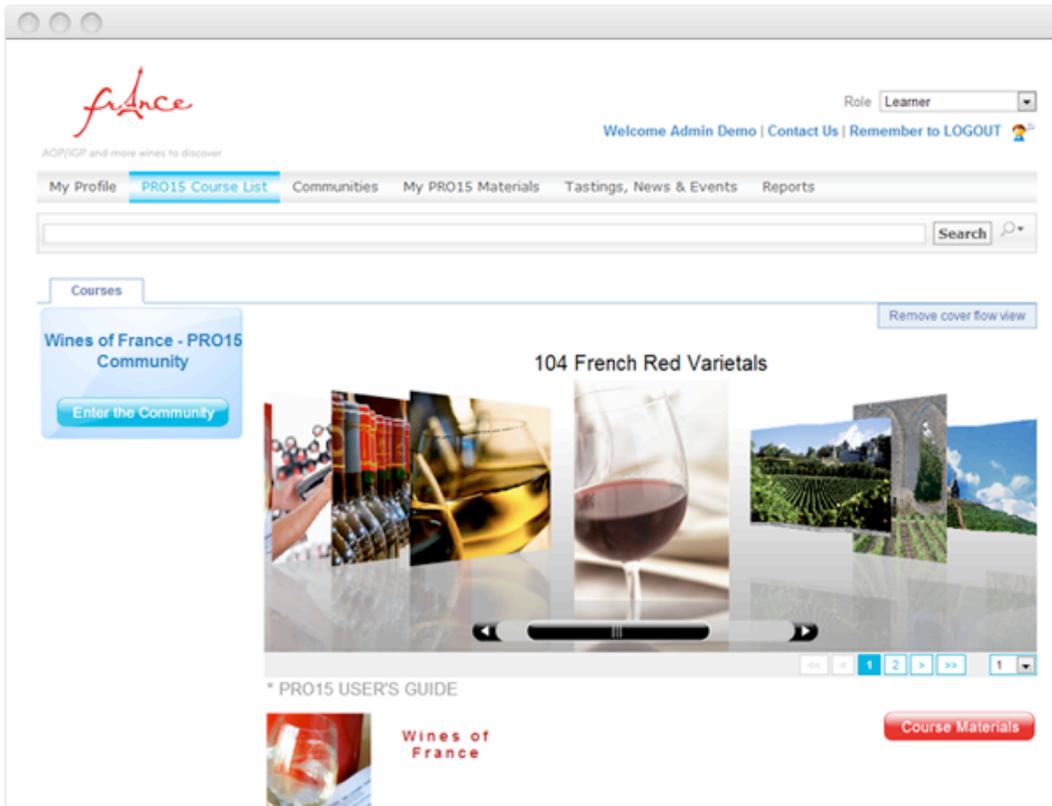
Search and Catalogs

1. How do content catalogs function in the LMS?

- Administrators can create a single catalog. ✓
- Administrators can create multiple catalogs. ✓
- A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
- End users can view and search catalogs before authenticating (logging in). ✓
- A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
- The LMS does not support catalogs.
- Other (please specify)

2. What types of search are available to *end users* in the LMS?

- Search within a single catalog ✓
- Search across multiple catalogs
- Search general site content ✓
- Search within communication and collaboration tools (e.g., discussion boards) ✓
- Search for other end users
- The LMS does not support search by end users.
- Other (please specify)



TOPYX can display content in an easy-to-use cover flow.

3. What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify)
4. Provide any other information or notes relevant to the “Search and Catalogs” section.

Community search will be available 4Q2012.

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓

- Facilitated online courses (excluding Webinars) ✓
- Real-time Webinars ✓
- Recorded or on-demand Webinars ✓
- Audio or video podcasts ✓
- Member-only discussion boards ✓
- Electronic study guides ✓
- E-learning programs combined with classroom-based learning (blended learning) ✓
- Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
- Educational simulations or games ✓
- CD-ROM or DVD-based education
- Third-party “off-the-shelf” courses ✓
- Other (please specify)

2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓

- The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user's status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)
3. Does the LMS provide the ability to author learning content?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
TOPYX is content agnostic any document, audio, video or SCORM content works on the platform. Any SCORM course authoring tool works. Any third party vendor content created in SCORM works.
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
It supports the integration through its WYSIWYG editors.
5. Does the LMS support offline authoring of learning content?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
- If yes, briefly describe how the LMS supports offline authoring.
—
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Check in/check out functionality
Standard
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Standard
 - Ability to monitor progress on tasks
Unavailable
 - Ability to add internal comments (viewable only by other administrators) to content
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
8. Can the LMS generate printer-friendly content?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
—

9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
Instructors can be limited by the admin and learners need approval from instructors, managers or admin.
10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Browser-delivered online content ✓
 - Downloadable version ✓
 - CD or DVD
 - HTML ✓
 - SWF ✓
 - PDF ✓
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).

Udutu, Articulate, Captivate, Camtasia, Lectora, iSpring and Toolbook among others.

20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
-

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Administrative calendar for courses
Standard
- End user calendar for viewing course options and schedules
Standard
- Waitlisting
Standard
- Personnel management (for scheduling instructors and facilitators)
Standard
- Facility management (for scheduling rooms)
Unavailable
- Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Unavailable
- Automatic e-mail messaging and notification to end users
Standard
- Automatic e-mail message and notification to administrators
Standard
- Customizable e-mail messages and notifications to users
Standard
- Customizable e-mail messages and notifications to administrators
Standard

2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.

Yes. Instructor-led classroom training capabilities are handled by Course Sessions. The functionality includes:

- *Session Name/Location*
- *Session Capacity*
- *Beginning & End Dates for Registration*
- *Waitlist capabilities*
- *Start and End Dates for the Session*
- *Long and Short Descriptions of the Session (with any potential links to relevant material)*

3. Provide any other information or notes relevant to the "In-person, Place-based Courses" section.
-

Webinars

1. Does the LMS provide integrated Webinar functionality?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
TOPYX has a webinar tool as an add-on feature or integrates with most popular third party vendors.
2. Briefly describe the company's preferred or recommended Webinar software.
TOPYX's own integrated virtual classroom has the following real-time learning functionality: audio, video and text chat; content sharing; web sharing; YouTube link; interactive white-boarding and recording capabilities for widely dispersed audiences.
3. Provide any other information or notes relevant to the "Webinars" section.
-

Registration

1. How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
4. Does the LMS provide self-serve password recovery help for end users?
Yes
5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
7. Can the fields for end user profiles be added, edited, and deleted?
Yes
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
Yes

10. Provide any other information or notes relevant to the “Registration” section.
—

Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes
3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level ✓
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis ✓
 - Other (please specify)
4. Can enrollments occur based on end user-specific criteria?
 - The end user’s role in the system ✓
 - The end user’s score on an assessment
 - The end user’s completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)
5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes

6. Provide any other information or notes relevant to the “Enrollment” section.

—

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?

Yes

2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user’s state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?

Yes

3. To what types of learning content can credit be assigned?
- Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?

- Automatically upon end user completion of the content ✓
- By the end user claiming the credit
- By an administrator awarding the credit to end users one by one ✓
- By an administrator performing a bulk upload
- By the end user claiming the credit and an administrator approving the claim
- The LMS does not support credit for this type of learning content.
- Other (please specify)

5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?

- By the end user claiming the credit
- By an administrator awarding the credit to end users one by one ✓
- By an administrator performing a bulk upload ✓
- By the end user claiming the credit and an administrator approving the claim ✓
- The LMS does not support credit for this type of learning content.
- Other (please specify)

6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?

- By the user claiming the credit
- By the user claiming the credit and an administrator approving the claim ✓
- The LMS does not support credit for this type of learning content.
- Other (please specify)

7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?

Yes

8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
- Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users) ✓
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline)
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing

education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.

Yes. —

14. How many clients use the LMS to manage continuing education or certification?
25
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE)
 - Continuing professional education (CPE) ✓
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify)
16. Provide any other information or notes relevant to the "Managing Continuing Education and Certification" section.
—

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
- Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓

- Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another may only require users to achieve a 70% to pass)?
Yes
 4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
 - Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment) ✓
 - No
 - Other (please specify)
 5. How does the LMS provide for automatic feedback for assessments?
 - Per question ✓
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option ✓
 - Based on which distracter the end user selected ✓
 - Per assessment ✓
 - Based on the end user's overall performance on the assessment ✓
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
 6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
 7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
Yes
 8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
 9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
Yes
 10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
 11. Can the LMS require end users who initially fail to retake an assessment?
 - Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
 12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
 13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
 14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
 15. Does the LMS provide for automatic randomization of assessments?
 - By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)

16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions)
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order) ✓
 - Hotspot questions (where users must select the correct area of a graphic)
 - Drag-and-drop questions
 - Other (please specify)
18. Provide any other information or notes relevant to the “Assessments” section.
-
2. How does the LMS allow evaluations to be used?
- Ability to offer an evaluation as a standalone item (i.e., not associated with an online course)
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
- Yes*
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
- No*
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
- No*
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
- Yes*
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
- Yes*
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
- Yes*
9. Does the LMS provide for time limits for evaluations?
- For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?

Yes

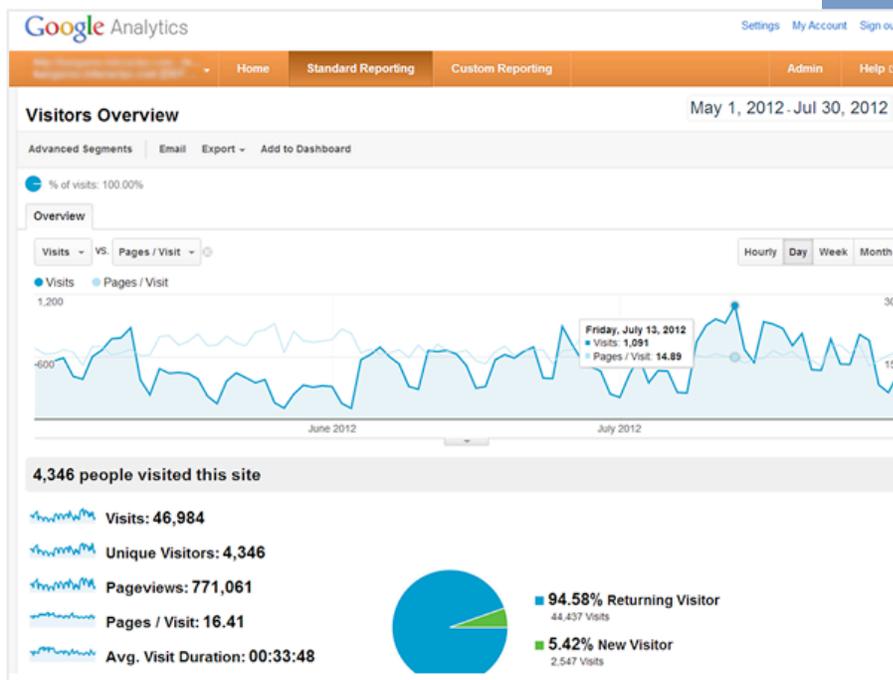
10. Which types of questions does the LMS make available for use in evaluations?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row)
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields)
 - Number fields
 - Date fields
 - Time fields
 - Demographic information
 - Other (please specify)
11. Provide any other information or notes relevant to the “Evaluations” section.
-

2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
- Yes*
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
- Yes*
4. How does the LMS provide reports?
- Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports ✓
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users’ profiles or store additional metadata on courses) ✓
 - Other (please specify)

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?

Yes



Integrated Google Analytics reporting provides more insight into TOPYX visitors and activity.

5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
56
7. List and briefly describe the standard, pre-configured reports available in the LMS.
 - *General Usage Report - number of courses, learners, instructors, material - general overview of your site*
 - *Catalog Report - number of items, number of subscribers, number courses using this material, % users completed*
 - *Course Report - number of people taking course, number passed and failed*
 - *Learner Report - a list of your learners and if they have passed or failed their courses*
 - *Registration Report - report which can be filtered by User, User Group, Course, Subject, Material, Date that will show when a user registered for a course and if they registered themselves or by an administrator*
 - *Material Completion Report - report which can be filtered by User, User Group, Course, Subject, Material, Date showing if a user has completed their course materials, when they started and the date they completed it, if a score is associated this will be shown her too*
 - *Login Activity Report - reporting the history of a user's login activity including the date they logged in and how long for*
 - *Learner Report Card - available for each course a learner takes, showing their results from quizzes and assignments, if they completed the course material, their final mark and the average and median final marks of the class*
8. Briefly describe the process for creating ad-hoc reports in the LMS.
Ad-hoc reports are created for customers via their implementation managers.
9. How many custom reports does the company typically develop for a client implementation of the LMS?
0
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
Not applicable
11. Provide any other information or notes relevant to the "Reporting" section.
—

Support for Multiple Sites

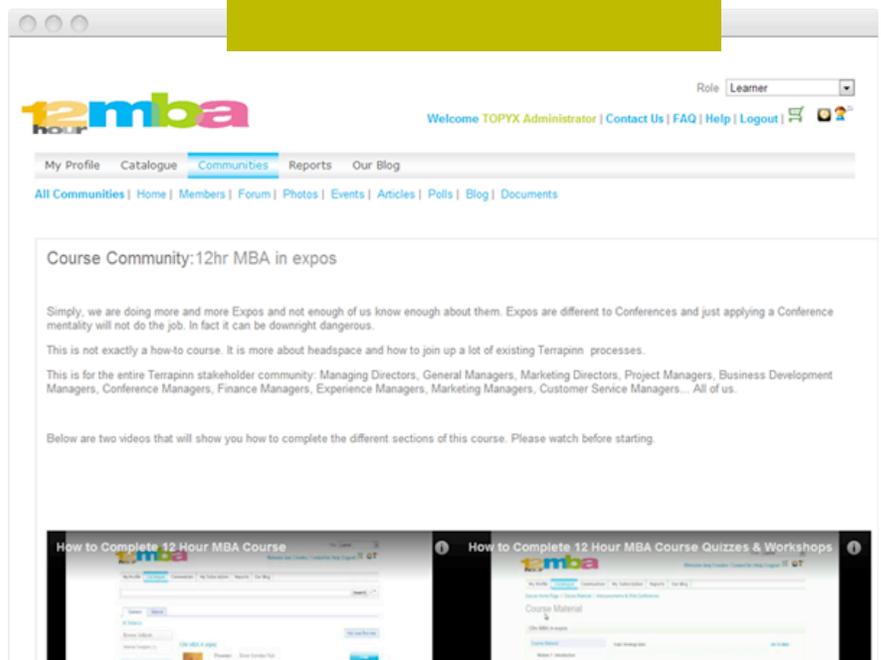
1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
 - Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓

- Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site).
 - Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify) ✓
User Groups & unique skins are available allowing for unique branding, catalogs, communities, user groups, email, languages, etc.
2. How many clients have a multiple-site implementation of the LMS?
40
 3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
3
 4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.
About 25% of current TOPYX clients have more than one skin for their sites.
- criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Standard
 - Live chats (for multiple end users)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Standard

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Completely custom
 - End user-to-administrator e-mail
Completely custom
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on

Communities in TOPYX can enhance collaboration.



- Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard
 - Live voice-over-IP
Standard
 - Virtual whiteboard
Standard
 - Virtual presentations (e.g., PowerPoint-driven)
Standard
 - Screencasting
Standard
 - Application-sharing
Standard
 - Ability to associate a wiki with a course
Completely custom
 - Single-point Web camera capability
Standard
 - Multiple-point Web camera capability
Standard
 - Networking (e.g., ability for end users to connect with one another)
Standard
 - Ability for each registered end user to have a blog
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
Yes. It can with a custom integration quoted at the time.
4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
TOPYX has seven levels of community within the platform:
- *Site*
 - *Subject*
 - *Program*
 - *Course*

- *Material*
- *User Group*
- *Learning Paths*

With many options available

- *Blogs*
- *Forums*
- *Photos*
- *Shoutbox*
- *Events*
- *Polling*
- *Articles*
- *Documents*
- *Chat*
- *Sharing of Facebook, Skype, Twitter, ooVoo, LinkedIn*

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Completely custom
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Unavailable
 - Handles payment by invoice (manual intervention needed)
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles sales tax, including variations based on the state or region
Unavailable
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Unavailable
 - Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Completely custom
 - Customizable e-mail message to administrators
Completely custom
 - Automatically maintains order status that can be checked by end user
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Unavailable
 - Handles discounts (e.g., by accepting discount codes)
Standard
- Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow
 - PayPal Website Payments ✓
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify) ✓
oGone and we can add any cart with an API.
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
TOPYX is integrated with its proprietary e-commerce application and is the recommended solution for our customers.

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?

Yes

8. Provide any other information or notes relevant to the “E-commerce” section.

TOPYX supports:

- *Free options*
- *Subscriptions*
- *Coupons*
- *Multi-currency*
- *Up selling*
- *Plus many marketing features*

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Live telephone support for end users

Semi-standard

- Live telephone support for administrators

Standard

- E-mail support for end users

Standard

- E-mail support for administrators

Standard

- Self-serve, searchable knowledge base for end users

Standard

- Self-serve, searchable knowledge base for administrators

Standard

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Self-serve online training (e.g., tutorials) for end users

Standard



- Self-serve online training (e.g., tutorials) for administrators

Semi-standard

- Scheduled online training (e.g., Webinars) for end users

Semi-standard

- Scheduled online training (e.g., Webinars) for administrators

Standard

- Scheduled in-person training at client offices for end users

Completely custom

- Scheduled in-person training at client offices for administrators

Completely custom

- Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users

Completely custom

- Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators

Completely custom

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Monday through Friday 8am to 8 pm Eastern, excluding holidays.
 4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Monday through Friday 8am to 8 pm Eastern, excluding holidays.
 5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Monday through Friday 8am to 8 pm Eastern, excluding holidays.
 6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Monday through Friday 8am to 8 pm Eastern, excluding holidays.
 7. Briefly describe the company's typical ongoing communication with its LMS clients.
Weekly meetings through implementation and as requested thereafter. Quarterly "check-ins."
 8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
—
 9. Provide any other information or notes relevant to the "Support and Training" section.
—
2. What approximate percentage of your client implementations to date have involved custom programming work?
15%
 3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
Custom sign-on requirements / reporting. Styling. Games.
 4. Briefly describe the process for used for planning and implementing custom programming work.
 - *Initial discovery meeting*
 - *Estimate including - time, delivery and pricing*
 - *Approval & 50% deposit*
 - *Start*
 - *Test*
 - *Delivery/sign-off*
 - *Final payment*
 5. Please specify the location (by time zone) of personnel involved in custom programming.
-8, -7, -6, -5, +5, +5:30, +5:45, and +6 UTC
 6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel
 - Yes, through a partner ✓
 - No
 - Other (please specify)
 7. Please specify the location (by time zone) of personnel involved in custom content development.
-8, -7, -6, and -5 UTC
 8. Provide any other information or notes relevant to the "Custom Programming and Content Development" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)

Latitude Learning LMS

Latitude Learning



Industry focus: training companies, original equipment manufacturers, franchisers, external training

LMS Version: 2.6

Value proposition: *The LMS was built for training companies to deliver their training and certification programs to students, as opposed to an HR Department's mission of training internal employees. The LMS is affordable and adaptable enough to meet the unique needs of the various associations' constituents. It also contains the features and functions required for an association to deliver training and certification of its members.*

Top clients (associations): *American Board of Emergency Medicine • Pet Industry Distributors Association • Canadian Psychological Association • American Society of Naval Engineers • Bureau of Education and Research • Associated Labor Union - Trade Union Congress of the Philippines*

Top clients (non-associations): *Brainlab • Chrysler • Ingram Micro • Insperity • Inteva Products • Memorial Hermann Medical Center • Nissan Forklift • Primrose Schools • Salient Systems • Victory Packaging*

URL for more information about the LMS:
<http://www.latitudelearning.com>

Three-year pricing: \$6,000 to \$175,000

Hosting: *By company or by client*

Latitude Learning

**100 East Michigan Avenue
Suite 200
Saline, MI 48176**

734.585.7422

info@LatitudeLearning.com

<http://www.latitudelearning.com>



Our Take on Latitude Learning LMS

Some Highlights

Unlike typical corporate learning management systems, the Latitude Learning LMS was created from the ground up to train external audiences, like association members and franchisees, rather than employees or other internal audiences. Still, Latitude staff note the one constant in the company's work is that every organization needs the LMS to act differently. So Latitude Learning focuses on adaptability: The Pet Industry Distributors Association uses the LMS to deliver training to their members' customers, the American Board of Emergency Medicine uses the system for high-stakes certification, and other associations use it for more "traditional" education purposes.

- The Latitude Learning LMS supports complex organizational structures via sophisticated parental hierarchies. Branding and content can be defined at the portal level down to the user attribute level. This flexibility easily accommodates chapter-based branding, for example.
- The certification engine makes it possible to specify prerequisites, equivalencies, electives, and mandatory classes along with performance data to create certifications and curriculum.
- Clients can modify workflows in the LMS; for example, registration can be streamlined or collect detailed user data. Widgets are used to integrate with external systems.
- An impersonation feature allows associations to provide great customer service by seeing what their users are seeing. An audit trail keeps track of actions taken by an administrator impersonating a user versus by the user herself.
- To avoid reinventing the wheel and focus on other features, Latitude Learning has embedded Ektron for rich content management functionality and has a partnership with Centra to offer integrated virtual classrooms. While the LMS can integrate with other Webinar systems, the Centra integration automates tasks like recording attendance.
- Latitude Learning offers its LMS customers over 75 free e-learning courses in coaching skills, customer service, project management, and other subjects and provides an e-learning course debugger for adding other SCORM-compliant content.
- Useful in compliance situations for non-SCORM content, learners can be asked to certify their completion of a task the LMS cannot automatically verify—e.g., reading an article or practicing a physical hands-on task.
- The company has added a number of new features to address client interest in accessing information that doesn't reside in the LMS from the LMS—for example, a new resource type in the LMS allows administrators to link to any URL.
- The LMS has strong mobile capability—it works "as is" on tablets with the exception of a tab-based feature which uses Flash, but Latitude Learning has developed a non-Flash alternative. CSS automatically modifies the LMS interface for different devices. So although the application has not been optimized for display on smartphones, it is accessible.
- Latitude Learning offers a bevy of FAQs, free weekly training Webinars, and a library of training videos.
- True to its flexibility credo, Latitude Learning offers its LMS as either software as a service or on a client-hosted open-source basis for a flat fee of \$19,500.

The full feature set of the Latitude Learning LMS lets it support multinational firms' global training needs, and its adaptability means that smaller associations can make it work for them too. Best of all, Latitude Learning offers its LMS for free for up to 100 users, allowing you to fully vet the system for yourself.



General Company Information

1. When was the company founded?
1995
2. How many employees does the company currently have?
30
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
*1) Latitude Learning LMS
2) LatitudeU
3) Question Bank*
5. Provide the company's contact information.
*100 East Michigan Avenue, Suite 200
Saline, MI 48176
USA
info@LatitudeLearning.com
734.585.7422*
6. Provide the URL for the company's Web site.
http://www.latitudelearning.com
7. Provide any other information or notes relevant to the "General Company Information" section.
Latitude Learning LLC is the developer and host of the world class learning management system (LMS), LatitudeLearning.com. Initially built for global Fortune 50 companies, LatitudeLearning.com is a scalable, robust and highly functional cloud-based LMS available for companies to effectively manage their training programs. Go to www.latitudelearning.com/freelms for a free, no obligation, 100-user Latitude Learning LMS. Additional information is available at www.latitudelearning.com.

General LMS Information

1. What is the name of the LMS product?
The Latitude Learning LMS
2. Provide the product version described in this survey response.
2.5.1.62626
3. When was the first version of the LMS initially released?
01/01/2001

4. Briefly describe the upgrade cycles for the LMS.
We use a continuous build process which results in a new release approximately every other week.
5. How many associations use this LMS?
7
6. How many organizations in total use this LMS, including associations?
2,000
7. How many end users are registered in the single largest client implementation hosted by the company?
1,000,000
8. How many end users are registered in the single largest client implementation hosted by the client?
1,000,000
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
3,000,000
10. Briefly describe the value proposition for this LMS as it applies to associations.
The LMS was built for training companies to deliver their training and certification programs to students, as opposed to an HR Department's mission of training internal employees. The LMS is affordable and adaptable enough to meet the unique needs of the various associations' constituents. It also contains the features and functions required for an association to deliver training and certification of its members.
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
94%
 - 500 to 2,499 registered end users
2%
 - 2,500 to 4,999 registered end users
1%
 - 5,000 to 9,999 registered end users
1%
 - 10,000 to 24,999 registered end users
1%

- 25,000 or more registered end users
1%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
- 1,000 or less
0%
 - 1,001 to 5,000
0%
 - 5,001 to 10,000
0%
 - 10,001 to 25,000
50%
 - 25,001 to 50,000
50%
 - 50,001 to 100,000
0%
 - More than 100,000
0%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
- Less than 100
0%
 - 101 to 200
0%
 - 201 to 500
0%
 - 501 to 1,000
0%
 - 1,001 to 5,000
0%
 - More than 5,000
100%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
Training companies • Original equipment manufacturers • Franchisers • External training
15. Please list the company's top *association* clients.
American Board of Emergency Medicine • Pet Industry Distributors Association • Canadian

Psychological Association • American Society of Naval Engineers • Bureau of Education and Research • Associated Labor Union - Trade Union Congress of the Philippines

16. Please list the company's other (non-association) top clients.
Brainlab • Chrysler • Ingram Micro • Insperity • Inteva Products • Memorial Hermann Medical Center • Nissan Forklift • Primrose Schools • Salient Systems • Victory Packaging
17. Provide a URL for more information about the LMS.
<http://www.latitudelearning.com>
18. Provide any other information or notes relevant to the "General LMS Information" section.
This LMS Is available as a SaaS (software as a service) application.

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)
- Complex
180
Typical
30
Simple
1
2. Briefly describe the implementation process.
- 1) *Identify the targeted performance metric for improvement*
 - 2) *Analyse the relationship between performance metric and training*
 - 3) *Define the training objective*

- 4) Determine how to organize the people
 - 5) Determine how to organize the knowledge
 - 6) Determine how to track progress
 - 7) Set-up LMS
 - 8) Migrate historical data
 - 9) User acceptance test
 - 10) Launch production LMS
3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.
Project manager. Architect. Developer. Business Analyst.
 4. Please specify the location (by time zone) of company personnel involved in implementation.
-5 UTC
 5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
Training coordinators. LMS Administrators.
 6. Provide any other information or notes relevant to the "LMS Implementation" section.
—

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$3,000

- 2,500
\$12,500
 - 5,000
\$22,000
 - 10,000
\$40,000
 - 25,000
\$75,000
 - Unlimited
—
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$6,000
 - 2,500
\$27,500
 - 5,000
\$52,000
 - 10,000
\$90,000
 - 25,000
\$175,000
 - Unlimited
—
 3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$19,500
 - 2,500
\$19,500

- 5,000
\$19,500
 - 10,000
\$19,500
 - 25,000
\$19,500
 - Unlimited
\$19,500
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$19,500
 - 2,500
\$19,500
 - 5,000
\$19,500
 - 10,000
\$19,500
 - 25,000
\$19,500
 - Unlimited
\$19,500
5. Briefly describe the pricing model for the LMS.
SaaS version: \$2-4 per active user per year. Enterprise version: \$19,500 license plus optional implementation services.
6. Briefly describe the payment schedule.
Set-up cost: 50% upfront, 50% at completion. Annually pre-pay access fees.
7. Briefly describe pricing for additional services.
Professional services - \$140 per hour. Customer support - fixed price support contracts available.
8. Provide any other information or notes relevant to the “Pricing” section.
—

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Windows Server, SQL Server.
2. Briefly describe the technical framework and code structure of the LMS.
.NET, ASPX, SQL Server.
3. Briefly describe the LMS’s ability to share data for the purposes of migration and integration.
Extensive library of web services for real-time integration.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
The LMS is used by several Global 1000 firms to manage training on a global basis. It has been tested in our performance lab to handle over 100,000 concurrent users.
5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
No known limits.
6. Provide any other information or notes relevant to the “Technology” section.
—

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
LMS usage requires a commercial browser (IE, Chrome, Safari, Firefox, etc.), Java and at least a dial-up internet connection. Other technical requirements or limitation may occur based on any e-learning courses loaded by the administrator.
2. What are the technical requirements for an *administrator* to access the LMS?
LMS administration requires a commercial browser (IE, Chrome, Safari, Firefox, etc.), Java and at least a dial-up internet connection.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes

4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.

Yes

5. Provide any other information or notes relevant to the “System Requirements” section.

—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?

10%

2. Briefly describe the typical types of integration for the LMS.

1. Automated User Management.

2. eLearning Course Launch.

3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.

FTP, SOAP, Web Services.

4. Briefly describe the process used for planning and implementing integration between the LMS and another system.

Agile Methodology.

5. With which of the following Webinar systems has the LMS been integrated for a client implementation?

- Adobe Connect
- Elluminate
- Genesys
- GoToWebinar ✓
- Microsoft Live Meeting ✓
- ReadyTalk
- WebEx ✓
- Completely custom (non-commercial) Webinar system
- The LMS has never been integrated with a Webinar system.
- Other (please specify) ✓

Centra

6. With which of the following association management systems (AMSeS) has the LMS been integrated for a client implementation?

- Aptify (Aptify)
- Association Anywhere (ACGI)
- ClearVantage (Euclid)
- CRM for Members (ProTech)
- IMIS (Advanced Systems International)
- IRMembership (IRM Systems)
- Members360 (Affiniscape)
- netFORUM (Avecetra)
- Office Manager (internet4associations)
- Personify (TMA Resources)
- TIMSS (TMA Resources)
- Wild Apricot (Wild Apricot)
- Completely custom (non-commercial) AMS ✓
- The LMS has never been integrated with an AMS.
- Other (please specify)

7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?

- ACGI CMS Anywhere
- BrowserCMS
- DotNetNuke
- Drupal
- Ektron ✓
- Joomla!
- Microsoft SharePoint Server
- Results Direct CMSPlus
- Completely custom (non-commercial) CMS
- The LMS has never been integrated with a CMS.
- Other (please specify)

8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.

Yes. eXact Learning.

9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.

Yes. PayPal Merchant Services.

10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
Yes. Articulate, Captivate, Uduku.
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
Yes. Questionmark Perception.
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
Yes. Person Vue.
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
Yes. Skillsoft, Kesdee, Compliance Online, Care2Learn.
14. Provide any other information or notes relevant to the “Integration and Interoperability” section.
—

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards.
 - Other (please specify)
2. Can the LMS play content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
3. Provide any other information or notes relevant to the “Standards and Guidelines” section.
—

Hosting

1. Is the LMS available as a *company-hosted* solution?
Yes
2. How many LMS installations are hosted by the *company*?
2,000
3. Is the LMS available as a *client-hosted* solution?
Yes
4. How many LMS installations are hosted by the *client*?
2
5. How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
6. If the company’s LMS hosting is provided by a partner or partners, please list the name (s).
Not applicable
7. Briefly describe the company’s preferred or recommended hosting option.
LMS available through LatitudeLearning.com on a Software-as-a-service basis. Latitude hosting also available for client-specific implementations.

8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
Routine maintenance scheduled in off hours, usually Saturday nights.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing
 - Yes, when requested for an additional fee
✓
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the “Hosting” section.
—

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users’ prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
Yes

6. Provide any other information or notes relevant to the “Personalization” section.
Ektron’s CMS is integrated into the LMS for complete personalization capability.

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
Yes. Every LMS has its own set cascading style sheets and custom HTML web parts that are accessible via the LMS to the LMS Administrator. These plus a library of webservices and Ektron’s CMS can be used to create a highly customized user experience.
2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).
Yes. Every LMS has its own set cascading style sheets and custom HTML web parts that are accessible via the LMS to the LMS Administrator. These plus a library of webservices and Ektron’s CMS can be used to create a highly customized user experience.
3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.
Yes. Each LMS portal include a configuration file which controls user navigation and access to the LMS functions.
4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.
Yes. Each LMS portal include a configuration file which controls user navigation and access to the LMS functions.

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
Yes. Each LMS portal has it's own set of custom HTML web parts. Plus Ektron's CMS can be activated. Our library of web services can then be used to create a unique user experience.
 6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.
Yes. Each LMS portal has it's own set of custom HTML web parts. Plus Ektron's CMS can be activated. Our library of web services can then be used to create a unique user experience.
 7. Provide any other information or notes relevant to the "Interface Configuration" section.
—
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
Yes
 5. Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes
 6. In how many countries has the LMS been implemented for clients?
90
 7. Please list the countries where the LMS has been implemented for a client.
North America, South America, Europe, ASia, Middle East and Africa.
 8. In how many languages has the LMS been implemented for clients?
13
 9. Please list the languages in which the LMS has been implemented for a client.
English (US), French (Canada), Spanish (Mexico), French, Spanish (Spain), Dutch, German, Italian, Russian, Polish, Japanese, Korean, Chinese (Simplified).

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term "student" with the term "learner" throughout the site)?
Yes
 2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term "student" with the term "learner" throughout the site)?
Yes
 3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
10. How many language packs are available for the *end-user* view of the LMS?
13
 11. Please list the languages for which a language pack is available for the *end-user* view.
English (US), French (Canada), Spanish (Mexico), French, Spanish (Spain), Dutch, German, Italian, Russian, Polish, Japanese, Korean, Chinese (Simplified).
 12. How many language packs are available for the *administrator* view of the LMS?
1
 13. Please list the languages for which a language pack is available for the *administrator* view.
English.
 14. Provide any other information or notes relevant to the "Internationalization and Localization" section.
LMS supports multiple currencies as well.

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users
 - The LMS does not support search by end users.
 - Other (please specify)
3. What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users
 - Search for other administrators
 - The LMS does not support search by administrators.
 - Other (please specify)
4. Provide any other information or notes relevant to the “Search and Catalogs” section.

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars)
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education ✓
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)
3. Does the LMS provide the ability to author learning content?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓

- If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
Assessment can be authored in the LMS.
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
A course shell is provided so rich media can be wrapped in a SCORM shell.
 5. Does the LMS support offline authoring of learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
Supports SCORM authoring tools. Includes test launch and debug tool for SCORM courses.
 6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Check in/check out functionality
Standard
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Unavailable
 - Ability to monitor progress on tasks
Unavailable
 - Ability to add internal comments (viewable only by other administrators) to content
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
 8. Can the LMS generate printer-friendly content?
 - Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
 9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
 10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
 - Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable

11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
-
- Browser-delivered online content
 - Downloadable version
 - CD or DVD
 - HTML
 - SWF
 - PDF
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
Articulate, Captivate, eXact Learning LCMS.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
-

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard

- Waitlisting
Standard
 - Personnel management (for scheduling instructors and facilitators)
Standard
 - Facility management (for scheduling rooms)
Standard
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Standard
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Standard
2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
No
 3. Provide any other information or notes relevant to the “In-person, Place-based Courses” section.
—

Webinars

1. Does the LMS provide integrated Webinar functionality?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar

software (e.g., single sign-on).

2. Briefly describe the company’s preferred or recommended Webinar software.
Centra.
3. Provide any other information or notes relevant to the “Webinars” section.
—

Registration

1. How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
4. Does the LMS provide self-serve password recovery help for end users?
Yes
5. Can administrators define new *end-user* roles with distinct rights and access in the site?
—
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
7. Can the fields for end user profiles be added, edited, and deleted?
Yes

8. Is the content of profile fields updatable by end users if allowed by administrator?

Yes

9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?

No

10. Provide any other information or notes relevant to the “Registration” section.

—

Enrollment

1. How can end users be enrolled in courses in the LMS?

- By self-enrollment ✓
- By enrollment code or key
- By an administrator enrolling end users one by one ✓
- By an administrator performing a bulk upload ✓
- As the result of an e-commerce purchase ✓
- By self-enrollment with administrator approval ✓
- Other (please specify)

2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?

No

3. How administrators configure enrollment options?

- Sitewide
- At the catalog level
- By course group
- On a course-by-course basis ✓
- On an end user-by-end user basis
- Other (please specify)

4. Can enrollments occur based on end user-specific criteria?

- The end user’s role in the system ✓
- The end user’s score on an assessment ✓
- The end user’s completion of prerequisites for a particular course ✓

- The LMS does not support enrollment based on end user-specific criteria.

- Other (please specify)

5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?

Yes

6. Provide any other information or notes relevant to the “Enrollment” section.

—

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?

Yes

2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user’s state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?

No

3. To what types of learning content can credit be assigned?

- Content delivered by the system (e.g., an online course that users access through the LMS) ✓
- Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
- Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement)

LATITUDE CG
Technology Driven Performance

Home | **My Learning Center** | Announcements | Approvals | Certification Rules | Certification Management | Courses | Course Support | Locations | Distributions | Facilities | User Groups | Interests | Organizations | Reports | Resources | Site Management | Users

Jeff Walter, Welcome to the Learning Center!

Home | My Details | Goals | Certification | Curriculum | History | My Employees | Approvals

Welcome

Welcome to Latitude's Learning Center...a great source of knowledge.

From here you can find courses you're interested in "Learning". You'll be given time to "Apply" acquired knowledge. Finally, you'll be able to further demonstrate your knowledge by "Teaching" others.

Featured Courses (10)

Live Courses (0) ● Future Training ● Recent Training

Self-Studies (0)

Interest List (26)

Mail Center (0)

LATITUDE LEARNING

Home » Courses » Search Courses

Search Courses

Access the numerous training offerings in the LMS. To search for a course, enter your search criteria and click Search. From the list of courses that displays, you can click the course name to view detailed information about the course.

Search

All Categories »

Page 1 of 10 | Prev 5 Pages | Prev Page | 1 2 3 4 5 | Next Page | Next 5 Pages »

Code	Name and Description	Delivery Method	Cost	Action
AA000	Rules of Behavior for Network Access 8 hour(s) Course on proper use of government computer networks.	Classroom	\$0.00	View Offerings Add Interest
AA001	Federal Information System Security Awareness Course on FIS security awareness. Required annually.	Classroom	\$0.00	View Offerings Add Interest
AA002	External Training Request Enroll in this course when you want to request training from an external provider. Please complete the attached External Training Request Form.	Self-Study	\$0.00	Enroll Enroll Others
AEDED01	Traffic Safety and Driver Education 8 hour(s)	Classroom	\$1,000.00	View Offerings Add Interest
		Assessment	\$0.00	Enroll Enroll Others
	ance of internal customer service, and communication with internal customers...	eLearning - Preapproved	\$0.00	Enroll Enroll Others
	cts	Classroom	\$0.00	View Offerings Add Interest
		Classroom	\$1,000.00	View Offerings Add Interest
	ware	Classroom	\$1,000.00	View Offerings Add Interest
		Classroom	\$1,000.00	View Offerings Add Interest

LATITUDE LEARNING

Home » Curriculum

My Curriculum Status

The requirements and status of courses needed to achieve specific skill areas and levels.

Home | My Details | Certification | **Curriculum** | History

Program : 2012 | Go »

Skill Profile: Technical Competencies | User: |

Individual Curriculum Completion Status

Skill Area	Electrical	Engine	Safety
Journeyman	1	0	0
Master	0	0	0

Current View: Individual Curriculum Completion Status

Completed | In Progress | Failed | Pending

Electrical

Click me to view or edit details.

Journeyman Met

- Electric Journeyman
- Introduction to Electronics

Master Goal

- Electric Master
- Advanced Electronics
- Conflict Management
- Facilitating Improvement

Engine

Click me to view or edit details.

Journeyman

- Engine Journeyman
- 21 CFR Part 11 Auditing
- But I Don't Have Customers
- Four Steps to Presentations that Motiv

Master

- Engine Master
- Kyocera FS-C8500DN Service Basics
- Kyocera FS-C8500DN Service Assess

Safety

Click me to view or edit details.

Journeyman

- Safety Journeyman
- OSHA Safety
- Safety Program Assessment
- Traffic Safety and Driver Education

Master

- Safety Master
- Facilitating Improvement
- Effective Project Management
- Continuous Improvement in the Workpl
- Teamwork Challenges

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A manager's course enrollment workflow in Latitude Learning LMS using the Enroll Others option

[LOGOUT](#) [REMOVE IMPERSONATION](#)
Joe Student / PSP-TEST-STORE



You are here: [Home](#) » [Employees](#) Better people. Better pets.

Success Starts Here

Pet retailers across North America use Pet Store Pro to give their stores a competitive edge.

- Click on the Home tab to access free resources for pet store owners and managers.
- Click on the My Details tab to update your account information.
- Click on the My Employees tab to manage employee training.

Home My Details My Employees

Manage an Individual Employee's Training

- Click on Employee Information to update name, e-mail or password
- Click on Assigned Chapters to add or remove assignments and track employee progress.
- Click on Completed Chapters to view final performance and print certificates

Employee Information + Show

Assigned Chapters - Hide

Birds
Print Certificate



Started: ✔
Completed: ✔

Test Status: ✘
Score: 0%

Date Taken: 1/24/2011

Remove Chapter

Cats
Print Certificate



Started: ✔
Completed: ✘

Test Status: ✘
Score: ...

Remove Chapter

Available Chapters - Hide

Assign a chapter by dragging the icon to the Assigned Chapters section.

Birds



Cats



Dogs



Freshwater Fish



Lizards



Saltwater Fish



A customized manager's course enrollment workflow in use at PetStorePro, a product of the Pet Industry Distributors Association, powered by Latitude Learning LMS

[LOGOUT](#) [REMOVE IMPERSONATION](#)
Joe Student / PSP-TEST-STORE



You are here: [Home](#) » [Employees](#) Better people. Better pets.

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- Click on the My Employees tab to manage employee training.

Home My Details My Employees

Manage an Individual Employee's Training

- Click on Employee Information to update name, e-mail or password
- Click on Assigned Chapters to add or remove assignments and track employee progress.
- Click on Completed Chapters to view final performance and print certificates

Employee Information + Show

Assigned Chapters - Hide

Birds
Print Certificate



Started: ✔
Completed: ✔

Test Status: ✘
Score: 0%

Date Taken: 1/24/2011

Remove Chapter

Cats
Print Certificate



Started: ✔
Completed: ✘

Test Status: ✘
Score: 4%

Remove Chapter

Available Chapters - Hide

Assign a chapter by dragging the icon to the Assigned Chapters section.

Birds



Cats



Dogs



Freshwater Fish



Lizards



Saltwater Fish



LATITUDE LEARNING

Course Search Advanced Search

Demo Admin - You are here: Home » Managed Students' Certification Status

Department Curriculum
Select the Program Year and Position Group to view the Department Curriculum Completion Status, including the tech trees for each skill area and level. Select the Skill Area to drill down to the Skill Levels and the courses within each Level. Select the Skill Level to set goals and create interest list requests for technicians.

Home | My Details | Certification | Curriculum | History | My Employees | Approvals

My Employees | User Group Participation | Department Certification | Department Curriculum

Search

(ST) Type: Service Technicians
(ST) User: (ST) < Department View >

(ST) Department Curriculum Completion Stat

(ST) Skill Area	Technician Certifications
Master Tech	2
Journeyman	3
Skilled	3

(ST) Current View: (ST) Department Curriculum Completion Status

Technician Certifications

Master Tech

(ST) Complete	(ST) Goal
Jones, Don	Doe3, John
Smith, David	

Journeyman

(ST) Complete	(ST) Goal

Quick Launch Courses

LMS Intro Course

LMS Admin Course

Done

Internet | Protected Mode: Off | 100%

A manager's course enrollment workflow in Latitude Learning LMS using the Manage Competencies option

Find: nissan Previous Next Options

(ST) Type: Service Technicians
(ST) User: Doe3, John

(ST) Return to Department View

(ST) Department Curriculum Completion Stat

(ST) Skill Area	Technician Certifications
Master Tech	2
Journeyman	3
Skilled	3

(ST) Current View: (ST) Individual Curriculum Completion Status - Doe3, John

(ST) Completed (ST) In Progress (ST) Disabled (ST) Pending

Technician Certifications

(ST) Submit All (ST) Reset All

Master Tech
Complete 3 ASE Certifications
(ST) Complete all Of the following courses

- [Automobile/Light Truck Engine Repair \(A1\)](#) | Self-Study | ASE | ASE01
- [ASE Automobile Service Consultant \(C1\)](#) | Self-Study | ASE | ASE02
- [Alternative Fuel Series \(F1\)](#) | Self-Study | ASE | ASE03
- [Electronic Diesel Engine Diagnosis Specialist Test \(L2\)](#) | Self-Study | ASE | ASE04
- [Undercar Specialist Designation \(X1\)](#) | Self-Study | ASE | ASE05
- [Damage Analysis and Estimating Certification \(B6\)](#) | Self-Study | ASE | ASE06

Required Master Technician Courses
(ST) Complete all of the following courses

- [Mast Basics](#) | eLearning - Preapproved | TECHNICIAN | MAST1
- [Forklift Basics](#) | eLearning - Preapproved | TECHNICIAN | FORKLIFT1
- [Nissan Electrical 1](#) | Class Room | TECHNICIAN | ELECTRIC1
- [Nissan Electrical 2](#) | Class Room | TECHNICIAN | ELECTRIC2
- [L01 L02 Presentation](#) | eLearning - Requires Approval | TECHNICIAN | L01L02
- [Advanced Fuel Systems Training](#) | Class Room | TECHNICIAN | ADVFUEL
- [1F1/1F2 Pre-Course Program](#) | eLearning - Preapproved | TECHNICIAN | PRE1F1/1F2

Done

Internet

- The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
 5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
 6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
 - By the user claiming the credit
 - By the user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
 7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?

Yes
 8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
 - Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
 9. Does the LMS help *end users* track their own continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines)
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline) ✓
 - No
 - Other (please specify)
 10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
 11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?

Yes
 12. Can end users view and print their own transcripts?

Yes

13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.

No

14. How many clients use the LMS to manage continuing education or certification?

10

15. What types of continuing education or certification do clients use the LMS to manage?

- Continuing education units (CE or CEU) ✓
- Continuing medical education (CME)
- Continuing legal education (CLE)
- Continuing professional education (CPE) ✓
- Certificate of successful completion ✓
- Credit towards completing or maintaining a certification, licensure, or other credential ✓
- Credit towards a degree at a college or university
- No clients are using the LMS to manage continuing education or certification.
- Other (please specify)

16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.

Certification engine allows certification requirements to include performance metrics (e.g. years experience, sales volume, customer satisfaction scores, etc.) as part of the certification rules.

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and

examinations)?

Yes

2. How does the LMS allow assessments to be used?

- Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
- Ability to associate an assessment with an online course ✓
- Ability to associate multiple assessments with a single online course
- Other (please specify)

3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another may only require users to achieve a 70% to pass)?

Yes

4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?

- Yes, after an end user submits her answer to each question
- Yes, after an end user completes the entire assessment ✓
- Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
- No
- Other (please specify)

5. How does the LMS provide for automatic feedback for assessments?

- Per question ✓
- Based on whether the end user answered the questions correctly
- Per distracter, or answer option
- Based on which distracter the end user selected
- Per assessment ✓
- Based on the end user's overall performance on the assessment
- The LMS does not provide for automatic feedback for assessments.
- Other (please specify)

6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
No
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
Yes
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes)
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013)
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions)
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order)

- Hotspot questions (where users must select the correct area of a graphic)
 - Drag-and-drop questions
 - Other (please specify)
18. Provide any other information or notes relevant to the “Assessments” section.
-

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
No
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes

9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013)
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
 10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row) ✓
 - Matrix of choices (multiple answers per row) ✓
 - Rating scale (e.g., Likert scales)
 - Text box (single field) ✓
 - Text boxes (multiple fields)
 - Number fields
 - Date fields
 - Time fields
 - Demographic information
 - Other (please specify)
 11. Provide any other information or notes relevant to the “Evaluations” section.
-

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes

3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?

Yes

4. How does the LMS provide reports?
- Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports ✓
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports ✓
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses)
 - Other (please specify)
5. How are the LMS reports made available?
- View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)

6. How many standard, pre-configured reports are available in the LMS?

20

7. List and briefly describe the standard, pre-configured reports available in the LMS.
- Course Reports. Correspondence Report. Completions Report. Incomplete Self Studies for a Location Report. Location Incomplete, No Show, Failed and Ineligible Report. Location Training History Report. Course Registration Report. Training Facility Report. Training Facility Schedule Report. Training Days Delivered Report. Training Schedule Search Report. Unprocessed Offerings Report. Instructor Usage Report. Active Users Report. Course Registration Summary Report. Certification Service Queue Status Report.*

Location Information Report. Total Active Certifications Report. User Certification, Curriculum and Course Completions Report. User Completion Report. User Information Report. User Login Activity Report. User Login Activity Report by Location Report. User Transcript Audit Report. Scorm Completion Discrepancy Report. Who Approved this Transcript Report. Orphaned Organization Report.

8. Briefly describe the process for creating ad-hoc reports in the LMS.
- 1. User selects data source for report. 2. User defines report format. 3. User defines user access rules.*
9. How many custom reports does the company typically develop for a client implementation of the LMS?
- 5
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
- Usually customized versions of existing reports to display only fields that are of interest to the client.*
11. Provide any other information or notes relevant to the "Reporting" section.
-

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
- The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓

- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
10
 3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
20
 4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.
—

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Semi-standard
 - End user-to-administrator e-mail
Semi-standard
 - Administrator-to-end user e-mail
Semi-standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Semi-standard
 - Live chats (for multiple end users)
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Completely custom
 - Discussion boards
Semi-standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Semi-standard
 - Live voice-over-IP
Completely custom
 - Virtual whiteboard
Semi-standard
 - Virtual presentations (e.g., PowerPoint-driven)
Semi-standard
 - Screencasting
Semi-standard
 - Application-sharing
Semi-standard
 - Ability to associate a wiki with a course
Semi-standard
 - Single-point Web camera capability
Semi-standard
 - Multiple-point Web camera capability
Semi-standard

- Networking (e.g., ability for end users to connect with one another)
Semi-standard
 - Ability for each registered end user to have a blog
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
 4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
—

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Completely custom
 - Handles transactions for physical items (e.g., books or CDs)
Completely custom
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Semi-standard
 - Handles payment by invoice (manual intervention needed)
Semi-standard
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
 - Handles sales tax, including variations based on the state or region
Semi-standard
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Semi-standard
 - Customizable e-mail message to users making the purchase
Semi-standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Semi-standard
 - Automatically maintains order status that can be checked by end user
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Semi-standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Semi-standard

- Handles discounts (e.g., by accepting discount codes)
Semi-standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments ✓
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify)
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
Prefer PayPal Merchant Services.

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
Yes
8. Provide any other information or notes relevant to the "E-commerce" section.
—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Completely custom
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Completely custom
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Semi-standard
 - Self-serve, searchable knowledge base for administrators
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Semi-standard

- Scheduled online training (e.g., Webinars) for administrators
Semi-standard
 - Scheduled in-person training at client offices for end users
Semi-standard
 - Scheduled in-person training at client offices for administrators
Semi-standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Semi-standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Based on client requirements.
 4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Monday through Friday 8 am to 5 pm EST.
 5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Based on client requirements.
 6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Monday through Friday 8 am to 5 pm EST.
 7. Briefly describe the company's typical ongoing communication with its LMS clients.
All LMS administrators receive weekly LMS Support updates via email, blog, RSS, Facebook, LinkedIn or Twitter. LMS administrators can contact support staff anytime during business

hours. LMS Status meetings scheduled weekly to annually depending on size of client.

8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
Generally our clients request that we do not communicate with the end user directly.
9. Provide any other information or notes relevant to the "Support and Training" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
5%
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
Most common customizations:
 - *Modify the LMS to capture and process client-specific data elements.*
 - *Adapt LMS to client's business processes.*
4. Briefly describe the process for used for planning and implementing custom programming work.
Latitude uses the Agile methodology for software development combined with our Continuous Integration Process. The Continuous Integration Process enables us to:
 - *Manage multiple versions of LMS source code*
 - *Automatically test source code changes within 10 minutes of posting the change*

- *Automatically recompile and regression test the entire LMS every night*
 - *Automatically deploy the LMS to QA and Production environments every night*
5. Please specify the location (by time zone) of personnel involved in custom programming.
-5 UTC
 6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - Other (please specify)
 7. Please specify the location (by time zone) of personnel involved in custom content development.
-7, -6, -5, and 0 UTC
 8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.
—

Learner Community LearnSomething



Industry focus: pharmacy and health care

LMS Version: NA

Value proposition: *Learner Community has been designed based on two decades of experience supporting associations. Two key ideas drive the development of Learner Community. First, we believe that the learning portal is just as important to the overall success of the learning program as the courses it contains. For both learner and administrator, the learning portal must be intuitive, easy-to-use, and complete. Therefore, we've made it easy for associations to build, deploy, and update a custom-branded portal using non-technical resources. We've also made sure the portal has all of the tools needed by associations administrators and learners to find, engage in, and track online learning, conference sessions, CE, and more. The second key idea that drives Learner Community is that the old notions of "courses" just don't work anymore. Associations need to be able to design, assemble, deploy, and then update learning experiences quickly and efficiently—and the old course development model is just too slow and expensive. Therefore, in Learner Community we've developed an object-oriented approach to building learning experiences that allows associations to leverage all of their existing sources of content—video, files, documents, exams, presentations, SCORM and AICC content, etc.—in new and exciting ways.*

Learnsomething
...it's more than our name

LearnSomething

2457 Care Drive
Tallahassee, FL 32308

202.957.7440

rburroughs@learnsomething.com

<http://www.learnsomething.com>

Top clients (associations): Alzheimer's Association • American Nurses Association - American Nurses Credentialing Center • American Society of Healthcare Risk Management • American Pharmacists Association • American Physical Therapy Association • American Society of Health System Pharmacists • American Association of Physical Medicine and Rehabilitation • ARMA International, • American Water Works Association • BoardSource • Community Anti-Drug Coalitions of America • Council on Social Work Education • Equipment Leasing and Finance Association • National Assoc. of Boards of Pharmacy • National Cancer Registrars Association • National Wildlife Federation • International Federation of Employee Benefits Plans • Institute of Food Technologists • Regulatory Affairs Professional Society • Society for Mining, Metallurgy & Exploration • Worldwide ERC • Specialty Pharma Association

Top clients (non-associations): A&P • Acme Stores • Bi-Lo • Brunos • Giant • Giant Food Stores • Stop n' Shop • Tops • Bartell Drug • Bashas • Big Y • BJ's • Brooks Pharmacy • Brookshire Brothers • Brookshire Grocery • Brown & Cole • Comprehensive Pharmacy Services • Costco • Drug Fair • CVS • Delhaize • FoodLion • Hannaford Bro. • Harveys • KashnKarry • Discount Drug Mart • Drug World • Duane Reed • Food City (KVAT) • Fry's Food • Gablers • Gemmel • Giant Eagle • Giant Food Stores • many more

URL for more information about the LMS:

<http://www.learnsomething.com/associations>

Three-year pricing: \$73,500 to \$508,500

Hosting: By company only





Our Take on Learner Community Some Highlights

Although Learner Community is new to this report, LearnSomething is not—the company and two earlier systems appeared in both previous versions of Association Learning Management Systems. Learner Community, released in the summer of 2011, represents the company’s latest thinking and grew out of its two decades of working with associations. Learner Community’s development is driven by two beliefs.

First, the learning portal is just as important to the overall success of the learning program as the courses it contains. For both learners and administrators, the portal has to be easy to use (a company representative said training for administrators usually takes eight hours or less because the system is intuitive), so Learner Community works as a content management system (CMS) as well as an LMS. As evidence that the platform has strong CMS functionality, LearnSomething’s main company Web site (www.learnsomething.com) is deployed using Learner Community.

Second, “courses” are passé. Associations need to be able to design, assemble, deploy, and then update learning activities quickly and efficiently—and the old course development model is too slow and expensive. Learner Community takes an object-oriented approach to building learning activities so associations can leverage their existing sources of content—video, files, documents, exams, presentations, SCORM and AICC content, etc.

Pricing for Learner Community comprises a license fee along with a \$1 transaction fee per course enrollment (whether it’s free or sold), which LearnSomething feels aligns costs with the value the system delivers to associations.

- Learner Community supports enrollment codes and adds the concept of an admin code related to an enrollment code. The admin code can be distributed to anyone who wants or needs to oversee use of a particular enrollment code.
- The catalogs for learning activities, which emphasize visual presentation in their use of iconography, are category-driven. When an administrator creates an activity, she tags it with a category name, and then the appropriate catalog or catalogs are dynamically updated.
- Administrators creating products in the system can add blocks and activities, nest blocks to control learners’ path, and set completion requirements (e.g., all activities in a block must be completed or any one or any two).
- Activity types currently include assessments, HTML content, AICC and SCORM packages, evaluations, and pause points—which lock the product for a length of time or until a particular and allow for learners to practice or implement what they’ve learned before continuing.

Given Learner Community is relatively young, it’s not surprising that the company is full of plans for additional features and functionalities. But what’s there now offers a lot for associations that want to control the Web site where learning is offered as well as the learning content.

General Company Information

1. When was the company founded?
1994
2. How many employees does the company currently have?
45
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
LearnSomething supports associations providing Learning Management Systems (LMS), Custom Content Development, and Off-the-Shelf Online courses.
5. Provide the company's contact information.
*2457 Care Drive
Tallahassee FL 32308
USA
rburroughs@learnsomething.com
202-957-7440*
6. Provide the URL for the company's Web site.
<http://www.learnsomething.com>
7. Provide any other information or notes relevant to the "General Company Information" section.
Through our support of hundreds of associations over almost twenty years, we've developed a deep understanding of the unique needs of associations. In addition, managing approximately 200,000 learning activities a month for ourselves and our clients, we have developed a first-hand understanding of the specific challenges and opportunities associations must consider as they deliver traditional, online, and blended accredited continuing education. We believe every learning activity is an important opportunity to engage members and volunteers, further your mission, and generate revenue. That's why we've built a world-class LCMS to support associations across the board. We've made it easy-to-use for administrators and learners alike while still providing the fully specialized suite of tools needed by a provider of accredited training.

General LMS Information

1. What is the name of the LMS product?
Learner Community
2. Provide the product version described in this survey response.
NA
3. When was the first version of the LMS initially released?
08/01/2011
4. Briefly describe the upgrade cycles for the LMS.
Learner Community was developed and is maintained using a state-of-the-art agile development methodology. This means we are constantly adding enhancements to the platform based on our association client needs. The platform is delivered as Software-as-a-Service (SaaS) meaning updates are available to all client in real-time.
5. How many associations use this LMS?
6
6. How many organizations in total use this LMS, including associations?
12
7. How many end users are registered in the single largest client implementation hosted by the company?
60,000
8. How many end users are registered in the single largest client implementation hosted by the client?
Not applicable
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
125,000
10. Briefly describe the value proposition for this LMS as it applies to associations.
Learner Community has been designed based on two decades of experience supporting associations. Two key ideas drive the development of Learner Community. First, we believe that the learning portal is just as important to the overall success of the learning program as the courses it

courses it contains. For both learner and administrator, the learning portal must be intuitive, easy-to-use, and complete. Therefore, we've made it easy for associations to build, deploy, and update a custom-branded portal using non-technical resources. We've also made sure the portal has all of the tools needed by associations administrators and learners to find, engage in, and track online learning, conference sessions, CE, and more. The second key idea that drives Learner Community is that the old notions of "courses" just don't work anymore. Associations need to be able to design, assemble, deploy, and then update learning experiences quickly and efficiently—and the old course development model is just too slow and expensive. Therefore, in Learner Community we've developed an object-oriented approach to building learning experiences that allows associations to leverage all of their existing sources of content—video, files, documents, exams, presentations, SCORM and AICC content, etc.—in new and exciting ways.

11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
- - 499 or fewer registered end users
 - 500 to 2,499 registered end users
 - 2,500 to 4,999 registered end users
 - 5,000 to 9,999 registered end users
 - 10,000 to 24,999 registered end users
 - 25,000 or more registered end users
12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
- 1,000 or less
0%
 - 1,001 to 5,000
0%
 - 5,001 to 10,000
50%
- 10,001 to 25,000
0%
 - 25,001 to 50,000
25%
 - 50,001 to 100,000
25%
 - More than 100,000
0%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
- Less than 100
50%
 - 101 to 200
0%
 - 201 to 500
0%
 - 501 to 1,000
0%
 - 1,001 to 5,000
0%
 - More than 5,000
50%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
- We have been industry leaders in the development of compliance training for the pharmacy professional and are widely recognized for our e-learning development services in that sector. We have made a concerted effort to provide services to healthcare associations.*
15. Please list the company's top *association* clients.
- Alzheimer's Association • American Nurses Association - American Nurses Credentialing Center • American Society of Healthcare Risk Management • American Pharmacists Association • American Physical Therapy Association • American Society of Health System Pharmacists • American Association of Physical Medicine and Rehabilitation • ARMA International, • American Water Works Association • BoardSource • Community Anti-*

Drug Coalitions of America • Council on Social Work Education • Equipment Leasing and Finance Association • National Assoc. of Boards of Pharmacy • National Cancer Registrars Association • National Wildlife Federation • International Federation of Employee Benefits Plans • Institute of Food Technologists • Regulatory Affairs Professional Society • Society for Mining, Metallurgy & Exploration • Worldwide ERC • Specialty Pharma Association

16. Please list the company's other (non-association) top clients.

A&P • Acme Stores • Bi-Lo • Brunos • Giant • Giant Food Stores • Stop n' Shop • Tops • Bartell Drug • Bashas • Big Y • BJ's • Brooks Pharmacy • Brookshire Brothers • Brookshire Grocery • Brown & Cole • Comprehensive Pharmacy Services • Costco • Drug Fair • CVS • Delhaize • FoodLion • Hannaford Bro. • Harveys • KashnKarry • Discount Drug Mart • Drug World • Duane Reed • Food City (KVAT) • Fry's Food • Gablers • Gemmel • Giant Eagle • Giant Food Stores • Happy Harrys • Harris Teeter • Hartig Drug Stores • Harvest Foods (Supermarket Investors, Inc.) • HEB • Hill and Knowlton • Horton & Converse • Hy-Vee • Ingles • Jordan Drug • King Kullen • Kinney • Kmart Corporation • Kroger • Long's • Longhorn Steakhouse • Medicine Shoppe • Medi-cap • Park Pharmacy • Pathmark • Pearson • PriceChopper(The Golub Corp) • Priceless • Quick Check • Red Lobster • Riteaide • Raley's • Roundys • Safeway • Savemart • Sav-Mor • State of Colorado • Snyders • Spartan • Supervalu • Thrifty White • Times Supermarkets • Ukrop • United Supermarkets • USA Drug • VG's Pharmacy • Wakefern • Waltz Pharmacy • Wegmans • Winn Dixie • Yoke's

17. Provide a URL for more information about the LMS.

<http://www.learnsomething.com/associations>

18. Provide any other information or notes relevant to the "General LMS Information" section.

—

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

90

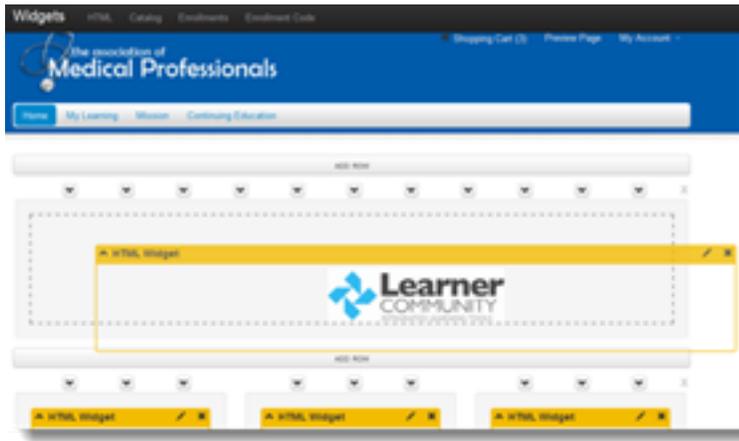
Typical

90

Simple

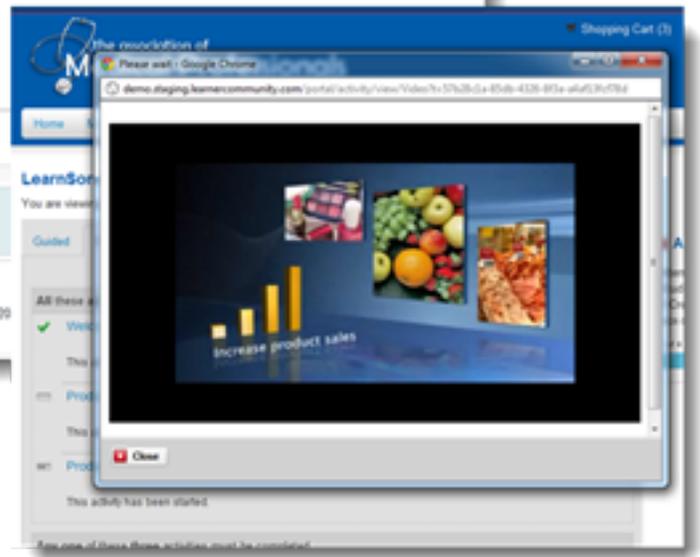
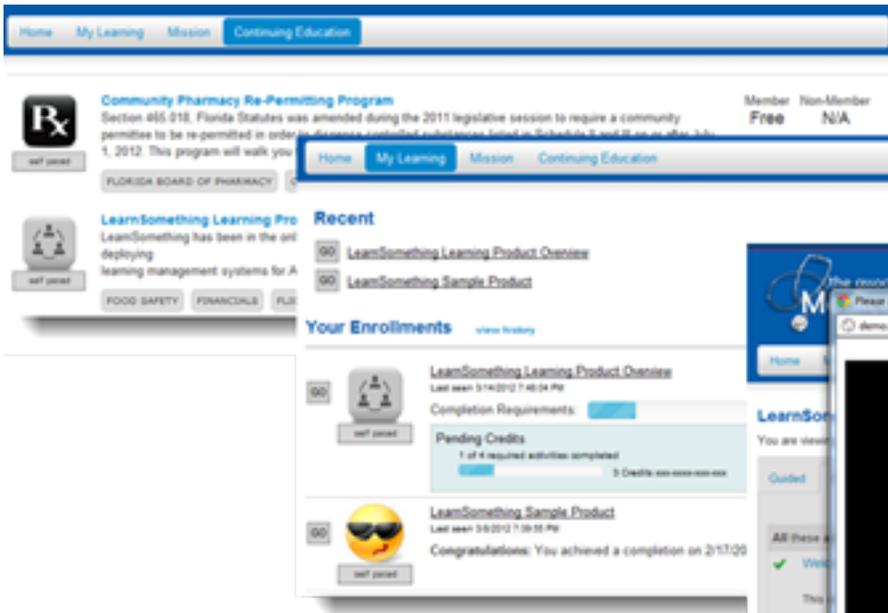
60

2. Briefly describe the implementation process. *Our implementation and support processes have been refined over many years of service to associations. We assign an experienced project manager to oversee every implementation and generally our work in the implementation process is divided into these workstreams:*
 - *Project Management - Using our proven implementation process, the project manager ensures effective communication, timely delivery of materials, and an overall solution that fully meets the needs of the client.*
 - *Site Development - Tapping the incredible flexibility of Learner Community, our design team works closely with you to design a learning portal that leverages your existing website and branding materials while creating a great learner experience.*
 - *Data Management - Our experienced IT staff defines and executes a data management plan that address issues such as migration of existing records, integration with the AMS, and reporting requirements.*



Administrators can edit their Learner Community site using WYSIWYG editors.

Learner Community's design emphasizes the visual to create engaging interfaces.



- *Content - This workstream addresses two components: site content and learning content. In terms of site content, we work with your team to develop a plan for populating and managing site content. This effort includes the training required for your administrators to manage your site. In terms of learning content, we work with your team to identify and execute a plan for migration of your existing learning content to your new portal, while also examining how to address your future plans for developing new content - a process revolutionized by Learner Community.*
3. Briefly describe the *company* personnel (by role) involved in the LMS implementation. *Implementation is led by an experienced project manager who serves as primary point-of-contact for clients. The project manager is supported by staff from the IS Department and Client Services. IS personnel support AMS integration, template design, platform configuration, and data migration. Client Services handles training and support.*
 4. Please specify the location (by time zone) of company personnel involved in implementation.
-5 UTC
 5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
Project manager; technology lead; design resource; instructional design resource (if existing courses are being implemented); site content manager. (In many cases one individual supports several roles. In the end, it all boils down to two things: Technology resources to handle integration and data tasks and Content resources to handle site design, content, and learning products.)
 6. Provide any other information or notes relevant to the “LMS Implementation” section.
While Learner Community is our newest platform, we’ve been implementing learning

solutions and LMS’s for associations for almost two decades. We understand the needs of associations and the specific opportunities and challenges that invariably arise during every implementation and have the experience to ensure success.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$43,500
 - 2,500
\$57,750
 - 5,000
\$69,750
 - 10,000
\$86,250
 - 25,000
\$113,500
 - Unlimited
\$188,500
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include

all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

- 500
\$73,500
- 2,500
\$116,250
- 5,000
\$152,250
- 10,000
\$201,750
- 25,000
\$283,500
- Unlimited
\$508,500

3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

5. Briefly describe the pricing model for the LMS.

Learner Community's pricing model is as revolutionary as the platform itself. Based on an understanding of our associations business needs, we've designed a model that moves away from the old "active user" model that creates misalignment between revenues and costs as well as client and provider. Our pricing model is composed of a flat license fee per year plus a

small fee for each course enrollment. This aligns to value for your organization. There is no limit on the number of users or courses you can have on the platform -- one flat fee covers your usage of the system. Then, to cover incremental costs we charge a small fee for each course enrollment. This aligns variable costs to an activity that is the basis of value creation (and revenue generation) on the portal. There are no sliding scales or other complicated structures in the model. You'll now exactly what your fixed costs and variable costs are so you can plan and budget accordingly. Finally, not only is this structure better from a planning and accounting perspective, total ownership cost is very competitive.

6. Briefly describe the payment schedule.

Implementation fee is billed 50% on signing and 50% on delivery. License fee is billed annually in advance. Course enrollment fees are billed quarterly in arrears.

7. Briefly describe pricing for additional services.

Our video hosting and streaming service is optional but strongly recommended. Video is the most popular form of content on the internet and our service offers the best capabilities. Video hosting fee is \$6,000 per year. Although most associations prefer to provide end-user support to members themselves (with us providing admin support), we do offer end-user support for a small incremental fee. Finally, for any additional services requested by a client, we provide resources on an hourly basis.

8. Provide any other information or notes relevant to the "Pricing" section.

Pricing provided in the first part of this section is estimated as it is based on "active users" a model we do not follow. An example price structure for an association with 25,000 members is:

- Implementation fee \$25k
 - License fee \$25k
 - Video hosting fee \$6k
 - \$1 per course enrollment billed quarterly
- The minimum implementation fee is \$25k and the minimum license fee is \$12k.*

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Not applicable
2. Briefly describe the technical framework and code structure of the LMS.
Learner Community is a .NET application developed using C# and an Agile SCRUM methodology. LearnSomething maintains enterprise level hardware infrastructure and servers are isolated using separation of concern. LearnSomething hosts its production environments at the Northwest Regional Data Center (NWRDC).
3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.
Learner Community supports a wide range of AMS and CRM integration opportunities with third party clients. Our integration points are offered through the use of live web services provided by the client and they include single sign on (SSO), enrollment synchronization, notification of enrollment progress (in progress, completed, failed, etc...), and notification of credit claimed for completions.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
Learner Community is massively scalable and stable. Below are a few highlights of the hardware infrastructure.
 - *Two separate power feeds are used to the equipment to help mitigate against power failure.*
 - *The main network feed is brought into our failover firewall system which helps prevent DoS if one of the firewall devices fails.*
 - *Public facing webservers are on the immediate intranet backbone.*
 - *A highly available SAN is used to host a Microsoft Hyper-V cluster. The cluster maintains a primary and a secondary system*

which allows for a rapid failover in the event of a system failure.

5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
Not applicable
6. Provide any other information or notes relevant to the "Technology" section.
—

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
Learner Community is cross-system and browser compatible. We support back to Internet Explorer 8; Chrome (always auto-updates to latest version); Firefox 5; and Safari 4.1.3 (Mac) and Safari 5.1.1 (Windows). In addition, Learner Community pages are HTML5 and therefore mobile friendly.
2. What are the technical requirements for an *administrator* to access the LMS?
Same as above.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the "System Requirements" section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
90%
2. Briefly describe the typical types of integration for the LMS.
SSO (single sign on), e-commerce, order sync, claim credit.

3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
Web Services (preferred) and FTP.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
For each client implementation, a detailed platform requirements document is developed defining all integration requirements. Based on our experience integrating with many AMS providers including TMAR (Personify), ASI (iMIS), Avectra (netForum), and many more, we have developed clear and straightforward processes and documentation to support each integration.
5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect
 - Elluminate
 - Genesys
 - GoToWebinar
 - Microsoft Live Meeting
 - ReadyTalk
 - WebEx
 - Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify) ✓
Through the use of HTML activity types in Learner Community, any webinar system can be utilized.
6. With which of the following association management systems (AMSES) has the LMS been integrated for a client implementation?
 - Aptify (Aptify)
 - Association Anywhere (ACGI) ✓
 - ClearVantage (Euclid)
 - CRM for Members (ProTech) ✓
 - iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscape)
- netFORUM (Avectra) ✓
- Office Manager (internet4associations)
- Personify (TMA Resources) ✓
- TIMSS (TMA Resources) ✓
- Wild Apricot (Wild Apricot)
- Completely custom (non-commercial) AMS ✓
- The LMS has never been integrated with an AMS.
- Other (please specify) ✓
yourmembership.com, i4a.
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
 - ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS. ✓
 - Other (please specify) ✓
Learner Community has native CMS capabilities. By way of demonstration of how powerful and easy-to-use the CMS is, we run our entire corporate website using Learner Community.
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
No
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
Yes. We can integrate most third-party e-commerce systems.

10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
Yes. Any SCORM or AICC compliant authoring tool.
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
No. Learner Community has native assessment capabilities.
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
No. Learner Community has native evaluation capabilities.
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
No
14. Provide any other information or notes relevant to the “Integration and Interoperability” section.
—

Standards and Guidelines

- Does the LMS produce content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards. ✓
 - Other (please specify)
- Can the LMS play content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
- Provide any other information or notes relevant to the “Standards and Guidelines” section.
—

Hosting

- Is the LMS available as a *company-hosted* solution?
Yes
- How many LMS installations are hosted by the *company*?
12
- Is the LMS available as a *client-hosted* solution?
No
- How many LMS installations are hosted by the *client*?
Not applicable
- How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
- If the company’s LMS hosting is provided by a partner or partners, please list the name(s).
Servers are hosted in a professional data center, and are managed by LearnSomething.
- Briefly describe the company’s preferred or recommended hosting option.
Learner Community is a hosted solution only.
- If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.

E-mail and online notification is provided prior to scheduled downtime.

9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing ✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the “Hosting” section.

—

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?

Yes
2. Can end users specify their preferred language (which may differ from the default site language)?

No
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?

Not applicable
4. Does the LMS support the ability to recommend courses based on end users’ prior activities, profile data, or role in the system?

No
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?

No
6. Provide any other information or notes relevant to the “Personalization” section.

—

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).

Yes. Each client site is driven by one or more custom HTML 5 templates. In addition, using easy what-you-see-is-what-you-get (WYSIWYG) editors, administrators have complete control over site content.
2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).

No
3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.

Yes. —
4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.

No
5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.

Yes. Learner Community can maintained and updated by anyone with basic computer skills. Using WYSIWYG editors and simple menus, site pages can be created, moved, updated, etc.
6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.

No



Examples of branded Learner Community sites

7. Provide any other information or notes relevant to the "Interface Configuration" section.

—

Hebrew)?

No

5. Can administrators change the default time zone used for formatting dates and times in the LMS?

Yes

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term "student" with the term "learner" throughout the site)?

No

2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term "student" with the term "learner" throughout the site)?

No

3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?

Yes

4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and

6. In how many countries has the LMS been implemented for clients?

1

7. Please list the countries where the LMS has been implemented for a client.

USA

8. In how many languages has the LMS been implemented for clients?

1

9. Please list the languages in which the LMS has been implemented for a client.

English

10. How many language packs are available for the *end-user* view of the LMS?

0

11. Please list the languages for which a language pack is available for the *end-user* view.

Not applicable

12. How many language packs are available for the *administrator* view of the LMS?

0

13. Please list the languages for which a language pack is available for the *administrator* view.
Not applicable
14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
Because it is a hosted solution that is available from anywhere on the internet we have a number of clients that have global members.

Search and Catalogs

- How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify) ✓
Catalogs in Learner Community are dynamically-generated using a simple menu system greatly simplifying the maintenance of catalogs.
- What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users
 - The LMS does not support search by end users.
 - Other (please specify)

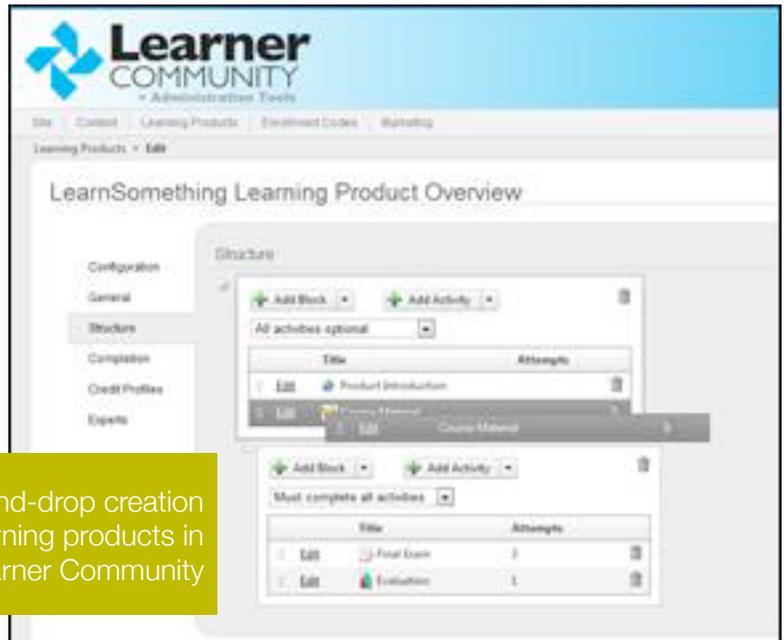
- What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify)
- Provide any other information or notes relevant to the “Search and Catalogs” section.
—

Authoring, Managing, and Displaying Learning Content

- Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education ✓
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
- By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓

- The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user's status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)
3. Does the LMS provide the ability to author learning content?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
Learner Community takes an object-oriented approach to building and deploying learning experiences that allows associations to leverage all their existing sources of intellectual property.
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
5. Does the LMS support offline authoring of learning content?
- Standard ✓
 - Semi-standard
 - Completely custom

Drag-and-drop creation of learning products in Learner Community



- Third-party
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
We support SCORM and AICC upload (in addition to all the other activity types we support) and encourages the use of off-the-shelf authoring tools such as Articulate Storyline.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Check in/ check out functionality
Unavailable
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Unavailable
 - Ability to monitor progress on tasks
Unavailable
 - Ability to add internal comments (viewable only by other administrators) to content
Unavailable

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 8. Can the LMS generate printer-friendly content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
That is basically a course development function 90% of the time. Its an integration of content format and course design.
 9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
Content can be accessed only by a learner who has an active enrollment.
 10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
 - Browser-delivered online content ✓
 - Downloadable version
 - CD or DVD
 - HTML
 - SWF
 - PDF
 - Other (please specify)
 12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
We encourage the use of off-the-shelf authoring tools such as Articulate Storyline.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
—
- End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Standard
 - Personnel management (for scheduling instructors and facilitators)
Semi-standard
 - Facility management (for scheduling rooms)
Unavailable
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Unavailable
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Unavailable
 - Customizable e-mail messages and notifications to administrators
Unavailable
2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
Yes. Learner Community features a robust conference management capability that makes it easy to manage sessions, claim credits, speaker evaluations, and where applicable additional activities such as exams.
3. Provide any other information or notes relevant to the "In-person, Place-based Courses" section.
—

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Administrative calendar for courses
Standard

Webinars

- Does the LMS provide integrated Webinar functionality?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
We suggest our associations clients use their webinar provider of choice and integrate that activity using HTML activity types in the learning product.
- Briefly describe the company's preferred or recommended Webinar software.
—
- Provide any other information or notes relevant to the "Webinars" section.
—

Registration

- How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key ✓
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase
 - By self-registration with administrator approval
 - Other (please specify)
- Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
No
- Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes

- Does the LMS provide self-serve password recovery help for end users?
Yes
- Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
- Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
- Can the fields for end user profiles be added, edited, and deleted?
Yes
- Is the content of profile fields updatable by end users if allowed by administrator?
Yes
- Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
No
- Provide any other information or notes relevant to the "Registration" section.
—

Enrollment

- How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify)
- Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes

3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis
 - Other (please specify)
 4. Can enrollments occur based on end user-specific criteria?
 - The end user's role in the system ✓
 - The end user's score on an assessment
 - The end user's completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)
 5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes
 6. Provide any other information or notes relevant to the "Enrollment" section.
—
3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS)
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement)
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
 4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
 5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
Yes
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
Yes

6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
- By the user claiming the credit
 - By the user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
- Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines)
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No ✓
 - Other (please specify) ✓
This is not supported but if a professional development plan was provided by the AMS functionality to measure activity against the PDP criteria could be supported.
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify) ✓
Credit claims are reported to integrated AMS, which can have a complete picture of all CE.
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
No
14. How many clients use the LMS to manage continuing education or certification?
12
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE) ✓
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓

- Credit towards a degree at a college or university ✓
- No clients are using the LMS to manage continuing education or certification.
- Other (please specify)

16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.

We have implemented a sophisticated credit profile system that connects courses and events with certificates or statements of credit. A single program may be redeemed for multiple credit types and each has an independent availability profile so that the system automatically restricts the awarding of credit when the CE availability registered with the accreditation body has expired. Credit templates are available in a catalog in the same way a re-usable learning object is cataloged in the LMS. Certificate templates are produced once and leveraged multiple times based on the definition in the credit profile.

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?

Yes

2. How does the LMS allow assessments to be used?

- Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
- Ability to associate an assessment with an online course ✓
- Ability to associate multiple assessments with a single online course ✓
- Other (please specify)

3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?

Yes

4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
- Yes, after an end user submits her answer to each question
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
 - No
 - Other (please specify)

5. How does the LMS provide for automatic feedback for assessments?

- Per question ✓
- Based on whether the end user answered the questions correctly ✓
- Per distracter, or answer option
- Based on which distracter the end user selected ✓
- Per assessment ✓
- Based on the end user’s overall performance on the assessment ✓
- The LMS does not provide for automatic feedback for assessments.
- Other (please specify)

6. Can the LMS automatically display a summary screen to show the end user her assessment score?

Yes

7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?

No

8. Does the LMS automatically link assessment data to the performance reports available in the system?

Yes

9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?

Yes

10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
- For end users to complete an entire assessment by a specified date (e.g., December 31, 2013)
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment)
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers)
 - True/false or yes/no questions ✓
 - Text field
 - Fill-in-the-blank questions (where users type answers in fields in the questions)
 - Matching questions
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order)
 - Hotspot questions (where users must select the correct area of a graphic)
 - Drag-and-drop questions
 - Other (please specify)
18. Provide any other information or notes relevant to the "Assessments" section.
—

Evaluations

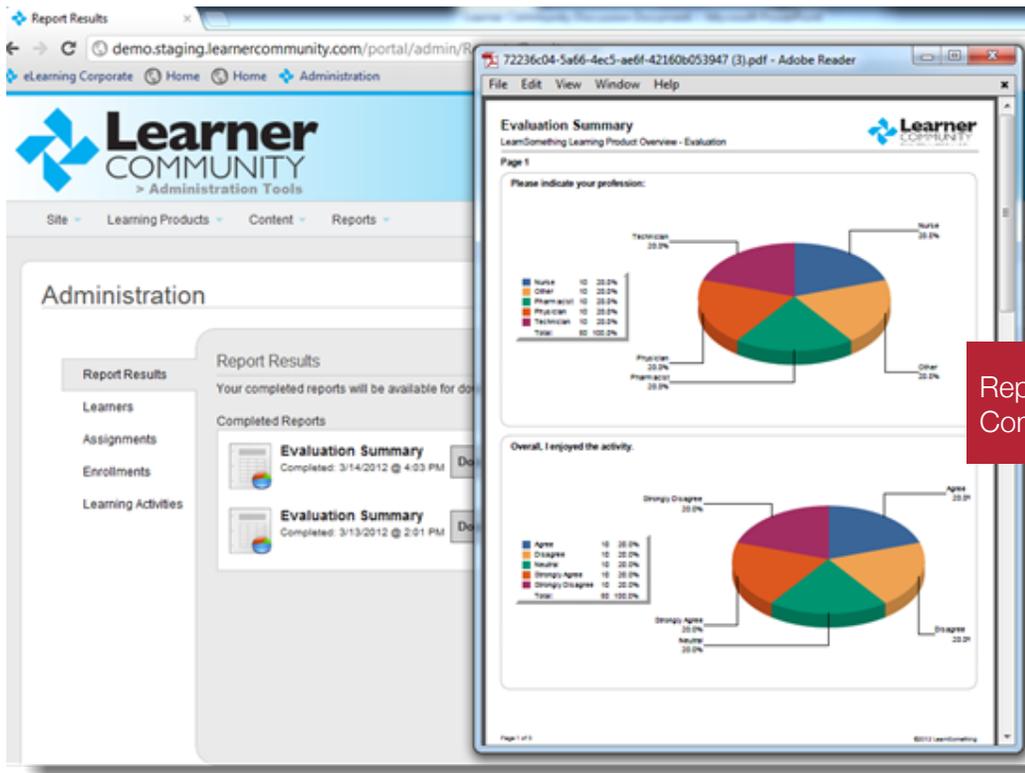
1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓

- Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
No
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
No
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
No
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
No
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
No
9. Does the LMS provide for time limits for evaluations?
- For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013)
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated)
 - The LMS does not provide for time limits for evaluations. ✓
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓

- Matrix of choices (single answer per row)
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields)
 - Number fields ✓
 - Date fields
 - Time fields
 - Demographic information
 - Other (please specify)
11. Provide any other information or notes relevant to the “Evaluations” section.
—

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes
4. How does the LMS provide reports?
- Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses)
 - Other (please specify)



5. How are the LMS reports made available?

- View report data online in browser
- Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
- Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
- Other (please specify)

6. How many standard, pre-configured reports are available in the LMS?

7

7. List and briefly describe the standard, pre-configured reports available in the LMS.

- *Registration*
- *Enrollment*
- *Question summary report*
- *Evaluation report*
- *Commerce report (tokens, e-commerce, enrollment code)*
- *Coaching report*
- *Accreditation report*

8. Briefly describe the process for creating ad-hoc reports in the LMS.

Not applicable

9. How many custom reports does the company typically develop for a client implementation of the LMS?

0

10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.

We normally do not develop custom reports during implementation, but have the ability to do so.

11. Provide any other information or notes relevant to the "Reporting" section.

—

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site).

- Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not).
 - Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts).
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish).
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports.
 - Other (please specify) ✓
Site pages can display group-specific content.
2. How many clients have a multiple-site implementation of the LMS?
0
 3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
Not applicable
 4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.
—

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Third-party
 - End user-to-administrator e-mail
Third-party
 - Administrator-to-end user e-mail
Third-party
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Third-party
 - Instant messaging (one-on-one)
Third-party
 - Live chats (for multiple end users)
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Completely custom
 - Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Third-party
 - Live voice-over-IP
Third-party
 - Virtual whiteboard
Third-party
 - Virtual presentations (e.g., PowerPoint-driven)
Third-party
 - Screencasting
Third-party
 - Application-sharing
Third-party

- Ability to associate a wiki with a course
Standard
 - Single-point Web camera capability
Third-party
 - Multiple-point Web camera capability
Third-party
 - Networking (e.g., ability for end users to connect with one another)
Third-party
 - Ability for each registered end user to have a blog
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
 4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
—

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Completely custom
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles sales tax, including variations based on the state or region
Completely custom
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Completely custom
 - Customizable e-mail message to users making the purchase
Completely custom
 - Automatic e-mail message on purchase to administrators
Completely custom
 - Customizable e-mail message to administrators
Completely custom
 - Automatically maintains order status that can be checked by end user
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Semi-standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
 - Handles discounts (e.g., by accepting discount codes)
Semi-standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net ✓
 - BluePay ✓
 - CCAvenue
 - CyberSource ✓
 - EBS
 - EWay ✓
 - FastCharge
 - goMerchant ✓
 - iBill
 - LinkPoint ✓
 - Moneris ✓
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments
 - Protx ✓
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay ✓
 - Other (please specify) ✓
Many other standard payment gateways are supported; all can be supported.
5. Does the e-commerce system comply with the Payment Card Industry Data Security

Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.

Yes

6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
E-commerce can run the spectrum from 100% native Learner Community to 100% native AMS, depending on client's needs.
7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
Yes
8. Provide any other information or notes relevant to the "E-commerce" section.
—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Standard
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Standard
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Standard
 - Self-serve, searchable knowledge base for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Standard
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Completely custom
 - Scheduled in-person training at client offices for administrators
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
For an additional fee, Monday through Friday, excluding holidays or 24/7.
4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Monday through Friday, excluding holidays. 8:30 - 5:30pm eastern.
5. If applicable, briefly but specifically describe when personnel work to respond to e-mail

support inquiries from *end users*.

For a fee, Monday through Friday, excluding holidays, 8:30 - 5:30pm eastern.

6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Monday through Friday, excluding holidays, 8:30 - 5:30pm eastern.
7. Briefly describe the company's typical ongoing communication with its LMS clients.
Each client's administrators have access to email and phone technical support, online training materials, and periodic webinars.
8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
End-user support is provided on a fee basis by e-mail Monday through Friday, excluding holidays, 8:30 - 5:30pm eastern.
9. Provide any other information or notes relevant to the "Support and Training" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
25%
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
Typical customization services are in support streamlining workflow based on client specific

- processes, or customizing/extending existing features to support a new use case.*
4. Briefly describe the process for used for planning and implementing custom programming work.
Discovery, documentation, pricing, creation of a formal SOW Addendum to the Master Agreement, project kick-off and then development, QA, revision and go live.
 5. Please specify the location (by time zone) of personnel involved in custom programming.
-5 UTC
 6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - Other (please specify)
 7. Please specify the location (by time zone) of personnel involved in custom content development.
-5 UTC
 8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.
—

Meridian Global Meridian Knowledge Solutions

LMS Version: 2012.1.1

Value proposition: *Meridian is highly regarded by all analysts that following our industry. We are rated a "Visionary" on the latest Gartner Group Magic Quadrant, we are rated "Best Value LMS" from Brandon Hall, and #1 in Customer Loyalty in the latest Bersin LMS Satisfaction Survey.*

Top clients (associations): *The Project Management Institute (PMI) • The American Institute of Certified Public Accountants (AICPA) • CPA2Biz • Society of Actuaries • LOMA • LIMRA • Money Management International • 32BJ Union • Joint Electrical Workers • FECS • CMR Institute*

Top clients (non-associations): *US Air Force • US Custom Border Patrol • Commonwealth of VA • Motorola • Mazda • Abbott Laboratories • AutoZone • CGI • Gunderson Lutheran • In-N-Out Burger • L-3 Communications • Land O' Lakes • Michigan Virtual University • PHI Service Company • Sodexo, Inc. • Autozone*

URL for more information about the LMS: • http://www.meridianksi.com/products/meridian_global_lms

Three-year pricing: \$55,000 to \$345,000

Hosting: *By company or client*



Industry focus: health care, retail, industry, legal, finance, and technology

Meridian Knowledge Solutions

14040 Park Center Road
Suite 200
Herndon, VA 20171

703.322.9565

info@meridianksi.com

<http://www.meridianksi.com>





Our Take on Meridian Global Some Highlights

Meridian claims to have been the first company to bring a fully Web-enabled LMS to market (in 1998), and it has embraced the shift to Web 2.0: There are more than 1,700 published Web services for Meridian Global, and the company creates new ones every time a feature or function is added to the system. Some customers have even abandoned the Meridian Global interface entirely and consume the LMS functionality via Web services.

- Meridian is one in the minority of companies included in this report that allows client-hosted installations of its LMS. The base code for the application is locked down in its own directory, and all customizations are developed separate from the base code, making system upgrades significantly easier.
- Meridian Global comes with a pre-built connector for the Personify AMS.
- Meridian Global features a fully integrated talent management capability that allows for aligning specific courses or learning paths with competencies.
- The system enables the creation of multiple, distinctly branded interfaces to support chapters, corporate members, or other e-learning customer groups.
- Meridian is authoring tool agnostic—the system can import any SCORM or AICC conformant content—but it does have a formal arrangement with Outstart to provide integrated access to that company’s learning content management system. (Additional costs apply.)
- Meridian Global has very good capabilities for creating assessments that may be published in conjunction with or independently of courses.
- The system supports assigning multiple credit types to a single course and enables administrators to define “approval paths” and assign them on a course-by-course basis.
- End users are able to personalize their learning environment in a number of ways, including selecting what appears on their home page, rearranging items, selecting from available skins, and changing languages. The LMS has been localized in 28 languages, ranging from Latin and Castilian Spanish to Arabic and Bahasa.
- The system supports sophisticated user groups, defined using multiple criteria (e.g., geography or job title), that can then be assigned or offered education specific to them.
- Meridian Global’s mobile profile allows learners to sign up for and access online courses using their Droid, iPhone, or BlackBerry. The mobile profile detects the user’s browser and delivers a view of the LMS tailored to that type of device.
- Administrators can add custom fields to various forms in the system (e.g., the user profile), and those fields are available automatically in the ad-hoc reporting the platform provides using LogiXML. In addition to the ad-hoc builder, LogiXML also powers the platform’s standard reports, which administrators can fine-tune for their needs by adding or removing tables, running crosstabs, and creating charts with labels.

The platform and the company have a track record of successful LMS implementations—the company reports retaining 98 percent of its customers retention over the last four years—and seem particularly well suited to larger-scale or international initiatives.

General Company Information

1. When was the company founded?
1997
2. How many employees does the company currently have?
120
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.

Meridian Global Learning Management System is a dynamic online learning and knowledge management infrastructure that integrates courseware delivery, administrative reporting and documentation, knowledge mapping, competency management, collaboration tools, knowledge capture, and performance management. The Domain Manager Module's tool-kit allows organizations to create customized interfaces of the Meridian Global for different organizations, sub-organizations, and stakeholder groups (such as different divisions or departments) within the organization through either single or multiple points of entry. The Competency Management Suite is an additional module for the Meridian Global. The Individual Development Plan (IDP)

is a competency modeling component that includes a 360 degree Skills Assessment Survey, skills gap analysis, recommended learning activities, coaching abilities, an administrative console for managing core competencies at the corporate level, and local competency management for creation of individualized learning paths.

5. Provide the company's contact information.
*14040 Park Center Rd., Suite 200
Herndon, VA 20171
USA
info@meridianksi.com
(703) 322-9565*
6. Provide the URL for the company's Web site.
http://www.meridianksi.com
7. Provide any other information or notes relevant to the "General Company Information" section.

Meridian is a full-service e-learning company, offering a robust learning management infrastructure as well as implementation and development consulting and services. We help large organizations realize the potential of e-learning through the effective use of technology tied directly to specific business objectives.

My Development
The IDP displays in a summary format by default (no scores or learning elements). The Core IDP elements. The Local IDP (if included) may contain models and/or competencies, and the model...

Current IDP

Click the checkboxes and then click Refresh IDP to view additional information for the IDP. Use the scores/priorities.

Name: John Leh
Job Title: Team Leader/ Manager
Manager: John Leh
Coach:
Last Archive Date: 5/10/2010
More Data: Score Details Learning Elements

Refresh IDP

Core IDP
Records found: 1

Model	Weighted Average	B
<input checked="" type="checkbox"/> Leadership	4.25	

Competency	Self Score	Manager Score	Peer Score	W
<input checked="" type="checkbox"/> Dealing with Difficult Employees	4.0	5.0	4.0	
<input checked="" type="checkbox"/> Managing a Team	3.0	4.0	3.0	
<input checked="" type="checkbox"/> Retaining Key Employees	5.0	5.0	4.0	
<input checked="" type="checkbox"/> Writing Performance Evaluations	4.0	5.0	4.0	

KSA

Avoids General Terms and Vague Phrases

Learning Element

Writing Excellent Performance Reviews

Provides Honest Feedback

Skills Survey
Complete and submit the skills survey in a timely manner.

Select a rating from every menu in the Skills Rating column and click Submit.

Name: John Leh
Job Title: Team Leader/ Manager
Job Description: Team Leader/ Manager
Survey Date: 11/17/2011

Competency Title
Dealing with Difficult Employees

KSA Title
Deal With the Behavior, Not the Person
Your goal is to develop a solution, not to "win". Focus on the inappropriate behavior. Use "I" statements like "I need everybody on the team here on time so we can meet our goals." Avoid statements like "you are always late". Don't assume the inappropriate behavior is due to fear, confusion, lack of motivation, personal problems, etc. Give the employee a chance to develop a solution to the problem. They are more likely to "own" the solution if you are responsible for developing it.

Develops a plan of Action
You're a manager. You know the value of planning. This situation is no different from the confrontation. You need to select a quiet, private place where you won't be interrupted. Whether you need to have others, like an HR representative, present in the meeting. Plan the confrontation and then make it happen.

Evaluates the Situation & Acts Quickly
It is important when dealing with difficult employees to act quickly. Often you will need to act almost immediately to neutralize a situation.

Managing a Team

With Meridian's integrated performance management solution, deploy custom competency models, assess and rate users, automatically create development plans to close gaps, and find qualified candidates.

General LMS Information

1. What is the name of the LMS product?
Meridian Global
2. Provide the product version described in this survey response.
2012.1.1
3. When was the first version of the LMS initially released?
3/1/1998
4. Briefly describe the upgrade cycles for the LMS.
Meridian typically releases one major and two minor releases per year.
5. How many *associations* use this LMS?
16
6. How many organizations in total use this LMS, including associations?
350
7. How many end users are registered in the single largest client implementation *hosted by the company*?
550,000
8. How many end users are registered in the single largest client implementation *hosted by the client*?
1,200,000
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
8,500,000
10. Briefly describe the value proposition for this LMS *as it applies to associations*.
Meridian is highly regarded by all analysts that following our industry. We are rated a "Visionary" on the latest Gartner Group Magic Quadrant, we are rated "Best Value LMS" from Brandon Hall, and #1 in Customer Loyalty in the latest Bersin LMS Satisfaction Survey.
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
6%
 - 500 to 2,499 registered end users
12%
 - 2,500 to 4,999 registered end users
15%
 - 5,000 to 9,999 registered end users
22%
 - 10,000 to 24,999 registered end users
17%
 - 25,000 or more registered end users
28%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
 - 1,000 or less
0%
 - 1,001 to 5,000
0%
 - 5,001 to 10,000
0%
 - 10,001 to 25,000
25%
 - 25,001 to 50,000
25%
 - 50,001 to 100,000
25%
 - More than 100,000
25%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
 - Less than 100
20%
 - 101 to 200
20%
 - 201 to 500
40%
 - 501 to 1,000
20%
 - 1,001 to 5,000
0%
 - More than 5,000
0%

14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
Meridian has extensive knowledge and experience with member based organizations, Public, Government, State and Local organizations. In addition, Meridian has vast experience and many successful customers in the Health Care, Retail, Industrial, Legal, Financial and Technology industries.

15. Please list the company's top association clients.
The Project Management Institute (PMI) • The American Institute of Certified Public Accountants (AICPA) • CPA2Biz • Society of Actuaries • LOMA • LIMRA • Money Management International • 32BJ Union • Joint Electrical Workers • FECS • CMR Institute

16. Please list the company's other (non-association) top clients.
US Air Force • US Custom Border Patrol • Commonwealth of VA • Motorola • Mazda • Abbott Laboratories • AutoZone • CGI • Gunderson Lutheran • In-N-Out Burger • L-3 Communications • Land O' Lakes • Michigan Virtual University • PHI Service Company • Sodexo, Inc. • Autozone

17. Provide a URL for more information about the LMS.
http://www.meridianksi.com/products/meridian_global_lms

18. Provide any other information or notes relevant to the "General LMS Information" section.
#1 Top scoring LMS in The eLearning Guild's 360o Report on Learning Management Systems in eight categories including: "ease of use for learners," "ease of use for [LMS] administrators."

LMS Implementation

1. In calendar days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom

programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

120

Typical

90

Simple

30

2. Briefly describe the implementation process.
Meridian facilitates the implementation process as an iterative process designed to transfer knowledge while focusing on a rapid implementation to accelerate ROI while also ensuring conformance with the technical and functional requirements.
3. Briefly describe the company personnel (by role) involved in the LMS implementation. A typical implementation will have the following additional resources:
- Project Manager to:
 - Oversee individual project(s) coordination
 - Ensure plan represents project contract requirements
 - Technical Lead to:
 - Perform overall technical site support
 - Design and Program customized features and function to meet business rules
 - Design Database Schema and prepare Data Dictionary
 - Coordinate additional programming resources
 - Product Implementation Specialist to:
 - Prepare customized Documentation and Training Material
 - Manage Quality Control
 - Web/Graphic Designer to:
 - Prepare customized graphical interface
 - Provide design concepts for new functionality

4. Please specify the location (by time zone) of company personnel involved in implementation.
-7, -6, -5, -4, -3 UTC
5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
A typical implementation will have the following resources:
 - *Program Manager*
 - *Project Manager*
 - *Technical Lead*
 - *Product Implementation Specialist*
 - *Web/Graphic Designer*
6. Provide any other information or notes relevant to the “LMS Implementation” section.
Meridian provides the ability to be your trusted advisor in implementing association or member based learning technology solutions of any complexity. We have deep in-house experience in integrating AMS applications with our LMS system.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$30,000
 - 2,500
\$60,000
 - 5,000
\$75,000
 - 10,000
\$100,000
 - 25,000
\$150,000
 - Unlimited
—
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$55,000
 - 2,500
\$80,000
 - 5,000
\$140,000
 - 10,000
\$210,000
 - 25,000
\$260,000
 - Unlimited
—
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

- 500
\$50,000
 - 2,500
\$80,000
 - 5,000
\$140,000
 - 10,000
\$210,000
 - 25,000
\$260,000
 - Unlimited
—
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$60,000
 - 2,500
\$125,000
 - 5,000
\$145,000
 - 10,000
\$285,000
 - 25,000
\$345,000
 - Unlimited
—
5. Briefly describe the pricing model for the LMS.
Meridian will work with clients to come to standard pricing terms and is open to providing enterprise wide licenses for specific clients. Meridian provides both perpetual licensing as well as subscription/SaaS pricing models.
6. Briefly describe the payment schedule.
Payment terms are always available with Meridian. Typical payment is in advance or in quarterly billing.

7. Briefly describe pricing for additional services.
Meridian passes along our standard GSA pricing to all customers for custom development. Our rates are typically 25-40% less than those of our competitors. Customer support is typically a yearly cost of 19% of the original license cost.
8. Provide any other information or notes relevant to the “Pricing” section.
—

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Windows 2003 Server for Application Server, and Database Servers. Supported Database systems include Oracle 10g and SQL 2005.
2. Briefly describe the technical framework and code structure of the LMS.
Meridian Global is a 100% .NET based application with an immutable codebase. This permits upgrading despite any customizations. The architecture permits both horizontal and vertical scaling to support large client bases.
3. Briefly describe the LMS’s ability to share data for the purposes of migration and integration.
More the 1700 published web services provide SOAP XML transactive operations on a transaction by transaction basis. Further import and export specifications permit batch transaction processing.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
The architecture of Meridian Global is designed not only for current user bases, but to scale for any size organization. Hardware and connectivity resources may be added to the architecture to accommodate virtually any size user population. Meridian Global not only exceeds typical concurrency requirements but also is scalable to meet a growing user base.

5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
There are no limits to storage capacity, number of users, amount of content, level of bandwidth, number of tiers, size of database, size of catalog or other such limitations.
6. Provide any other information or notes relevant to the “Technology” section.
Meridian’s unique architecture not only meets today’s business needs, but is designed to meet the challenges organizations will face in the coming years. Meridian Global has been built on Microsoft’s .NET platform allowing for multiple advantages. The biggest benefit of using a .NET LMS is the ability to easily integrate with existing or legacy systems and to modify the system without impacting the core code base. This provides for easy upgrades and longevity of the solution.

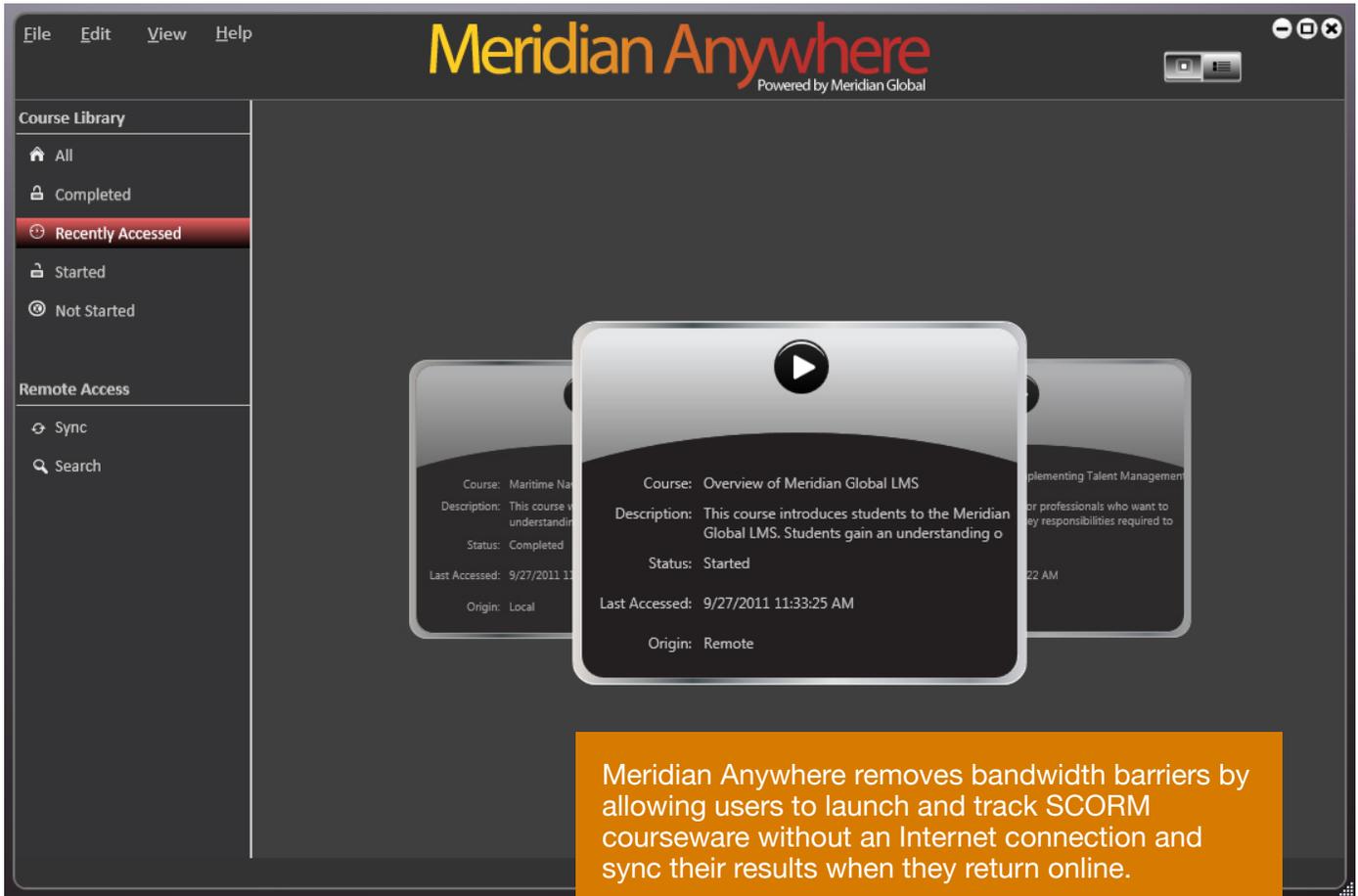
System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
Any system which can support Internet Explorer 6 - 8, Firefox or Mozilla can be used. No plug-ins are required for the LMS.
2. What are the technical requirements for an *administrator* to access the LMS?
Requirements are the same for administrators... Any system which can support Internet Explorer 6 - 8, Firefox or Mozilla can be used. No plug-ins are required for the LMS.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the “System Requirements” section.

Meridian Global was designed with an n-tier architecture to be highly scalable. The typical installation relies on the application tiers being implemented across three separate servers (or virtual machines): one server for the user interface tiers, one for the business logic layer, and one for the database. Meridian recommends hardware with similar specifications as part of the typical hosting environment for standard implementations of Meridian Global. For optimal performance and availability, Meridian recommends separate physical servers (or virtual machines) be used for the Web server (UI Tier – includes Knowledge View (KView), Content Server (CServer), Reports Server (RServer), and Help Server (HServer)), Business Logic server (Knowledge Server(KServer)), and database server (Knowledge Repository(KRepository)). Alternate configurations and architectures may be implemented, consult with your Meridian project team for more details.

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
90%
2. Briefly describe the typical types of integration for the LMS.
Meridian Global can support the planned integrations (SAP Financial System, SAP Human Resources System, etc.) using various integration methods. The product architecture is fully object oriented and supports integration to the various levels of the architecture through .NET Remoting, Web Services, and/or COM. Standards based technologies can be mated with Meridian Global in varying degrees of integration. Whether it is an HRIS integration, populating user, organization, and/ or other various data facets, a financial integration to track training costs across an organization, Virtual Classroom tools, or CRM/ Customer Service applications, most applications can be integrated to meet an organization’s business needs. Integrations can be as simple as



Meridian Anywhere removes bandwidth barriers by allowing users to launch and track SCORM courseware without an Internet connection and sync their results when they return online.



The Meridian Mobile Module simplifies delivery of content library to smart phones and tablets. The Meridian Global LMS detects the type of mobile device and browser and serves up pages that are dynamically scaled to available screen real estate.



providing single sign-on capabilities into an organization's 3rd party application, data feeds to import necessary business data, or full object or web service integrations to pair service offerings of Meridian Global and critical 3rd party or custom applications. Most integrations can be evaluated and recommendations provided after consulting with your business professionals to examine how one's organization actually uses their 3rd party or custom applications and wished to integrate it into the LMS platform. Meridian works closely with the customer's application engineers to determine the most effective method of integrating with each system. We provide extensive documentation of our APIs and system architecture, as well as consulting support for accomplishing the integrations. We routinely provide data templates for use by customer personnel in creating data feeds from source applications, customized to the customer's specific data requirements and applications.

3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
SOAP, APIs, Flat File Exchange, Direct Database access.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
The Meridian team is very experienced with integrating applications to our LMS, ranging from simple home-grown applications to SAP, Oracle, PeopleSoft, Ceridian, CGI Advantage, Cyberworks, and other various HRIS and Financial applications. Meridian Global includes an integrated Active Directory integration to provide seamless user data and login authentication. Common data integrations for HRIS include User feeds to populate users into the LMS, Organizational feeds to population organizational demographic information, and Job Position feeds to match users to the appropriate job titles and requirements. Other metadata may be passed into and out of the LMS to meet one's

specific needs. Each integration will be thoroughly evaluated to guarantee data security and functional awareness. These can be a simple as nightly data feeds being parsed into system or detailed Web Services that make operations available to one's HRIS/ERP application(s).

5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect ✓
 - Elluminate
 - Genesys
 - GoToWebinar
 - Microsoft Live Meeting ✓
 - ReadyTalk
 - WebEx ✓
 - Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify) ✓
Centra, Interwise.
6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
 - Aptify (Aptify) ✓
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid) ✓
 - CRM for Members (ProTech)
 - IMIS (Advanced Systems International)
 - IRMembership (IRM Systems)
 - Members360 (Affiniscape)
 - netFORUM (Avecetra) ✓
 - Office Manager (internet4associations)
 - Personify (TMA Resources) ✓
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS ✓
 - The LMS has never been integrated with an AMS.
 - Other (please specify)

7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
- ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server ✓
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS ✓
 - The LMS has never been integrated with a CMS.
 - Other (please specify) ✓
OutStart
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
- Yes. Integrated out of the box with Domiknow Claro and any PENS standard LCMS.*
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
- Yes. Payflow Pro, Payflo Pro Plus, Custom.*
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
- Yes. Too many to list—some common examples include: Captivate, Lectora, FlashPaper, OutStart, ToolBook, PowerPoint, SharePoint. Additional tracking and bookmarking capabilities are available when using SCORM or AICC compliant content.*
- Too many to list—Meridian can support the launching of any web based files some common examples include: Captivate, Lectora, FlashPaper, OutStart, ToolBook, PowerPoint, SharePoint. Additional tracking and bookmarking capabilities are available when using SCORM or AICC compliant content.*
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
- Yes. Questionmark, Articulate QuizMaker, Captivate, The OutStart LCMS, Lectora and other SCORM and AICC compliant tools. Meridian Global also includes an assessment tool built-in.*
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
- Yes. Meridian Global includes and integrated Survey Tool.*
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
- Yes. Skillsoft, MindLeaders, Vivid Learning Systems, Syntrio, Medcom Trainex. All other SCORM and AICC compliant content is also supported.*
14. Provide any other information or notes relevant to the “Integration and Interoperability” section.
- Organizations buy learning management systems (LMS) to deliver training, so it only makes sense that—whenever possible—the training ought to be simple and efficient to obtain, too. With currently over 17,000 titles, Meridian’s training collection is arguably the world’s largest. Meridian also offers a straightforward, trouble-free way to put together the training courses you need with custom online training library packages. Whether you’re looking for courses focused on on-the-job safety, customer service, government regulations or professional skills, Meridian’s virtual library is the most likely place to find what you need. Quality content is critical, so we’ve carefully selected a network of trusted content providers who’ve helped us build our library title by title. Each is a specialist at what they do, and we’ve combined their expertise with ours to get your training program jump-started in short order.*

Each course we offer will run on either our flagship LMS—Meridian Global—or the software-as-a-service version of our LMS. Courses are SCORM 1.2 / 2004 or AICC conformant. So you'll be able to deliver training the moment your LMS is rolled out to your employees, partners or customers.

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - Section 508 ✓
 - The LMS does not produce content that conforms to any of these guidelines or standards.
 - Other (please specify) ✓
LETSI, Tin Can.
2. Can the LMS play content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium ✓
 - Medbiquitous ✓
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
3. Provide any other information or notes relevant to the "Standards and Guidelines" section.
Meridian Global supports all major e-learning content and standard media types and sources, as it is supported through a partnership with the most powerful LCMS solutions in the industry: Dominknow Claro LCMS.

- Universal content support (SCORM 1.2-2004, AICC, IMS, IEEE, non-conformant)
- PowerPoint, Word, Excel, Adobe PDF, FrameMaker, Macromedia Flash, others
- Ready for emerging standards: CORDRA & S1000D
- Import & export content (bulk/individual from/to any source)

Third party content libraries which adhere to any of the above mentioned standards are supported. Bulk import and export of content is supported.

Hosting

1. Is the LMS available as a *company-hosted* solution?
Yes
2. How many LMS installations are hosted by the *company*?
150
3. Is the LMS available as a *client-hosted* solution?
Yes
4. How many LMS installations are hosted by the *client*?
200
5. How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
6. If the company's LMS hosting is provided by a partner or partners, please list the name (s).
The operational hosting environment is located in our dedicated, secure space in an Cogent co-location, Internet service exchange ensuring 100% power availability and 100% network connectivity. Our co-location offers a reliable infrastructure, fast connectivity and 24x7 network monitoring. We selected Cogent as our co-location partner to take advantage of the

industry's most advanced power, security, network and fire suppression technologies. This state-of-the-art data center is built to ensure efficient, reliable and continuous operations—even in the event of severe natural or man-made catastrophes.

7. Briefly describe the company's preferred or recommended hosting option.
Meridian Global has been and may be deployed either behind a client firewall or as an hosted solution in Meridian's secure hosting center. Meridian provides comprehensive and secure hosting services. We provide the hardware, software, maintenance, bandwidth, backups and all services related to the hosting of your LMS with a 99.5% uptime and available Service Level Agreement. Meridian provides robust hosting capabilities through the use of two separate hosting facilities. The hosting sites are geographically dispersed, using two different Internet Service Providers (ISPs). This approach provides substantial risk mitigation in the event of an operating site shutdown or complete site failure.
8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
Scheduled maintenance is determined by each customer's negotiated contract.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing ✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the "Hosting" section.
As a general trend we see 40% of customers leveraging hosting with 75% of new business choosing the hosted model. While 60% of our

existing client base has chosen to host the application themselves only 25% of new clients choose to implement the LMS in this fashion. Meridian Global has been and may be deployed either behind a client firewall or as an ASP solution in Meridian's secure hosting center. Meridian provides comprehensive and secure hosting services. We provide the hardware, software, maintenance, bandwidth, backups and all services related to the hosting of your LMS with a 99.5% uptime and available Service Level Agreement. Meridian provides robust hosting capabilities through the use of two separate hosting facilities. The hosting sites are geographically dispersed, using two different Internet Service Providers (ISPs). This approach provides substantial risk mitigation in the event of an operating site shutdown or complete site failure.

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
Yes

6. Provide any other information or notes relevant to the “Personalization” section.
- Meridian Global offers many ways for the user to personalize their experience. Starting with their Homepage, their own personal workspace, each user may control which “panes” of functions (access to shortcuts, online courses in progress, etc.) appear on their homepage. The top five most recent content items appear as quick links providing quick access to their preferred items. Users have control over the location, layout, and appearance of their favorite items.*

Interface Configuration

- Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
 - Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).
 - Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.
 - Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.
 - Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
 - Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.
- Yes. The user may select from among available “skins”. Each skin may have a completely different user interface, including alternate fonts, colors, graphic elements, and positioning of interface elements (toolbars, etc.). Meridian staff can create new skins per client request, or a client may choose to create their own skins. Addition of new skins does not require any changes to application code, and skins may be created by Web designers via style sheets (CSS).*
- Yes. The user may select from among available “skins.” Each skin may have a completely different user interface, including alternate fonts, colors, graphic elements, and positioning of interface elements (toolbars, etc.). Meridian staff can create new skins per client request, or a client may choose to create their own skins. Addition of new skins does not require any changes to*
- application code, and skins may be created by Web designers via style sheets (CSS).*
- Yes. The site is designed for maximum user friendliness, with the following features:*
- Site-wide and page level online help accessible from any screen
 - Dynamic menu bars that conform to the user’s permissions and show only those functions available to the user
 - Full support of 508c requirements for use with assisted browsers
- Yes. The site is designed for maximum user friendliness, with the following features:*
- Site-wide and page level online help accessible from any screen
 - Dynamic menu bars that conform to the user’s permissions and show only those functions available to the user
 - Full support of 508c requirements for use with assisted browsers
- Yes. End-user view is customizable depending on a user’s job, role, organization, or any other demographic.*
- Yes. Administrator view is customizable depending on a user’s job, role, organization, or any other demographic.*

7. Provide any other information or notes relevant to the “Interface Configuration” section.
- Meridian Global offers many ways for the user to personalize their experience. Starting with their Homepage, their own personal workspace, each user may control which “panes” of functions (access to shortcuts, online courses in progress, etc.) appear on their homepage. The top five most recent content items appear as quick links providing quick access to their preferred items. Users have control over the location, layout, and appearance of their favorite items. The application provides self-registration capability, allowing users to provide profile (name, address, etc.) information as well as allowing them to specify time-zone, language, and regional settings preferences. The user may change this information at any time within the system. The user may also select from among available “skins”. Each skin may have a completely different user interface, including alternate fonts, colors, graphic elements, and positioning of interface elements (toolbars, etc.). Addition of new skins does not require any changes to application code, and skins may be created by Web designers via style sheets (CSS).*

Internationalization and Localization

- Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
- Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
- Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
- Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
Yes
- Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes
- In how many countries has the LMS been implemented for clients?
10
- Please list the countries where the LMS has been implemented for a client.
United States, Canada, Mexico, Germany, France, United Kingdom.
- In how many languages has the LMS been implemented for clients?
28
- Please list the languages in which the LMS has been implemented for a client.
Meridian Global includes Language Localizations in 28 languages including Includes Arabic, Bahasa, Simplified Chinese, Traditional Chinese, Czech, Danish, Dutch, English, UK English, Finnish, French, French Canadian, German, Greek, Hebrew, Italian, Japanese, Korean, Norwegian, Polish, Portuguese, Portuguese Brazilian, Russian, Latin Spanish, Castilian Spanish, Swedish, Thai and Vietnamese. Other translations may be developed at the client’s expense.
- How many language packs are available for the *end-user* view of the LMS?
28
- Please list the languages for which a language pack is available for the *end-user* view.
Meridian Global includes Language Localizations in 28 languages including Includes

Arabic, Bahasa, Simplified Chinese, Traditional Chinese, Czech, Danish, Dutch, English, UK English, Finnish, French, French Canadian, German, Greek, Hebrew, Italian, Japanese, Korean, Norwegian, Polish, Portuguese, Portuguese Brazilian, Russian, Latin Spanish, Castilian Spanish, Swedish, Thai and Vietnamese. Other translations may be developed at the client's expense.

12. How many language packs are available for the *administrator* view of the LMS?
28
13. Please list the languages for which a language pack is available for the *administrator* view.
Meridian Global includes Language Localizations in 28 languages including Includes Arabic, Bahasa, Simplified Chinese, Traditional Chinese, Czech, Danish, Dutch, English, UK English, Finnish, French, French Canadian, German, Greek, Hebrew, Italian, Japanese, Korean, Norwegian, Polish, Portuguese, Portuguese Brazilian, Russian, Latin Spanish, Castilian Spanish, Swedish, Thai and Vietnamese. Other translations may be developed at the client's expense.
14. Provide any other information or notes relevant to the "Internationalization and Localization" section.
Meridian Global provides complete globalization support, and may be localized with multiple languages. Full time zone support is also included, with time zone information (daylight savings time rules and offsets) being configurable. All date/time information is displayed to the user in his/her own time zone. For example, training scheduled in a specific time zone will display in the user's preferred time zone. Meridian Global also provides full regional support for date/time formats, number formats and currencies.

Search and Catalogs

- How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
- What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users ✓
 - The LMS does not support search by end users.
 - Other (please specify)
- What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify) ✓
Search Domains, Organizations, Profiles, IDPs, Types of Content, much more.

4. Provide any other information or notes relevant to the “Search and Catalogs” section.
- Meridian has helped several of our clients develop skills catalogs and implement competency modeling. Our experience includes the use of both COTS and custom competency models and skills. We have conducted surveys and audits to develop competency models and map competencies and skills to roles or job profiles. Once developed, we catalog these skills using the IDP. The IDP groups knowledge, skills, and attitudes into competencies and then allows the organization to group competencies into competency models.*

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?

- Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
- Facilitated online courses (excluding Webinars) ✓
- Real-time Webinars ✓
- Recorded or on-demand Webinars ✓
- Audio or video podcasts ✓
- Member-only discussion boards ✓
- Electronic study guides ✓
- E-learning programs combined with classroom-based learning (blended learning) ✓
- Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
- Educational simulations or games ✓
- CD-ROM or DVD-based education ✓
- Third-party “off-the-shelf” courses ✓
- Other (please specify) ✓

Any file that can be initiated within a web browser can be used. Meridian, supports products for learning, such as books, guides, tapes, etc.

2. By which criteria can online courses be marked completed?

- The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)
3. Does the LMS provide the ability to author learning content?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor). *Meridian Resells two authoring solutions: The Articulate Learning Studio and the ClaroLCMS. Articulate is an offline, desktop based authoring tool. However, any tool that will develop SCORM or AICC compliant content is also supported. Meridian does not provide an course authoring tool within our LMS, however it does include simple tools to help administrators create basic tests and surveys.*
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated. *For hosted clients streaming servers may be provided within specific hosting packages.*

5. Does the LMS support offline authoring of learning content?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
Meridian Resells two authoring solutions: The Articulate Learning Studio and the ClaroLCMS. Articulate is an offline, desktop based authoring tool.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Check in/check out functionality
Standard
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Standard
 - Ability to monitor progress on tasks
Standard
 - Ability to add internal comments (viewable only by other administrators) to content
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Via Claro LCMS.
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
8. Can the LMS generate printer-friendly content?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
All pages in the LMS support printing from within a web browser and reports support a number of printing and export (to MS Excel and PDF) options.
9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
All courses and documents within the LMS allow administrators to set permissions on who may view and/or manage these items. Users without access will have these materials hidden from them.
10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Browser-delivered online content ✓
 - Downloadable version ✓
 - CD or DVD ✓
 - HTML ✓
 - SWF ✓
 - PDF ✓

- Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-part
 - Unavailable
 14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 18. Does the LMS provide the ability to make a document library available to users?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
Meridian Resells two authoring solutions: The Articulate Learning Studio and the Claro LCMS. However the LMS has no dependence upon any specific content development tool and is able to support all SCORM and AICC courses regardless of the tools used to develop them.
 20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
 —

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Standard

- Personnel management (for scheduling instructors and facilitators)
Standard
 - Facility management (for scheduling rooms)
Standard
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Standard
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Standard
2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
Yes. Meridian Global can facilitate, initiate or control conference sessions.
 3. Provide any other information or notes relevant to the “In-person, Place-based Courses” section.
—

Webinars

1. Does the LMS provide integrated Webinar functionality?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar

software (e.g., single sign-on).

Meridian Global allows for the use of any chosen VC tool. We offer generic Virtual Classroom tools where a Virtual Instructor Led Training event may be scheduled for distribution and enrollment. For generic ILT events, the section is scheduled outside the LMS using any tool (LiveMeeting, etc.) and then the call-in number, URL, and pass code are entered as standard course information. In addition, Meridian provides a standard WebEx integration. The WebEx integration will allow Meridian clients with a valid WebEx account to create and schedule a WebEx session from within the LMS. As the course information is entered in the VILT scheduling tool, Meridian Global communicates the information to WebEx via an API integration. This method will allow administrators to schedule both the WebEx session and the VILT course section with a single administrative workflow.

2. Briefly describe the company’s preferred or recommended Webinar software.
As noted above, Meridian has a built in integration to the WebEx platform, however we also provide a simple integration which supports a variety of virtual tools. Meridian can support clients seeking a tight integration to tools other than WebEx through our professional services team.
3. Provide any other information or notes relevant to the “Webinars” section.
Through use of our web services APIs, integration with the selected virtual classroom product may occur. We manage virtual classroom training in the same manner and with the same tools as any instructor led training - the only difference being the “online” location of training. With our 1350 document .Net APIs, we also have the ability to create “deeper” integrations with any of the mentioned products.

Registration

1. How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
4. Does the LMS provide self-serve password recovery help for end users?
Yes
5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
7. Can the fields for end user profiles be added, edited, and deleted?
Yes
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
Yes

10. Provide any other information or notes relevant to the “Registration” section.

Profile fields for updating can be enable/disable by an administrator.

Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes
3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level ✓
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis ✓
 - Other (please specify) ✓
Organization, Training Profile, Job Title, much more.
4. Can enrollments occur based on end user-specific criteria?
 - The end user’s role in the system ✓
 - The end user’s score on an assessment ✓
 - The end user’s completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)

- Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?

Yes

- Provide any other information or notes relevant to the “Enrollment” section.
Meridian Global supports easy-to-use self service enrollment for all users. Instructor-led classes also contain robust waitlist and enrollment capabilities including both manual or automatic wait-list management.

Managing Continuing Education and Certification

- Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?

Yes

- Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user’s state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?

Yes

- To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to

satisfy a continuing education requirement) ✓

- The LMS does not allow credit to be assigned to learning content.
 - Other (please specify) ✓
Multiple types of credit are also supported.
- How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
 - How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
 - How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
 - By the user claiming the credit ✓
 - By the user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)

7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
- Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify) ✓
The Meridian supports a default certificate for the system, as well as domain defaults and also allows administrators to define course specific certificates.
9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline) ✓
 - No
 - Other (please specify) ✓
Suggestive ratings and alternate learning paths.
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users) ✓
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
Yes. Each learner has a personalized learning portal or "My Homepage". Further, each user can control what "panes" appear on their homepage (such as my online courses, my scheduled courses, announcements, shortcuts, etc.). The learner's portal/learning plan can be tailored to the individual based on job profile, organizational unit, or even individual needs.
14. How many clients use the LMS to manage continuing education or certification?
250
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE) ✓
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university ✓
 - No clients are using the LMS to manage continuing education or certification.

- Other (please specify) ✓
Credit types can be defined by an administrator.

16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.
Meridian Global provides every user with a historical, dynamic personalized transcript. The transcript tracks all training of any medium completed, any certification, accreditations and self-reported training events called Personal Learning Events. Personal Learning Events can be managed by a user’s manager on their behalf. Depending on a configuration option setting, the end user may also be able to manage their personal learning events. Learning events appear on the user’s Transcript, and it’s from here they can be added, edited, and removed. Examples of Personal Learning Events include: Attendance at a conference, Demonstrating performance on the job, on-the-job training, developmental assignments including job shadowing, and courses taken outside of the LMS. Learners can also add and track Certifications via their transcript. Certification types are configurable by the Administrator. Examples of Certifications include: Annual CPR Certification, Professional Certification such as Microsoft Certified Systems Engineer (MCSE) or Project Management Professional (PMP), etc. Learners can track total hours required to maintain the certification, total earned, certification expiration date, etc.

Assessments

- Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
- How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)
- Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?
Yes
- Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
 - Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
 - No
 - Other (please specify)
- How does the LMS provide for automatic feedback for assessments?
 - Per question ✓
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option ✓
 - Based on which distracter the end user selected
 - Per assessment ✓
 - Based on the end user’s overall performance on the assessment
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
- Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
- Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
No

8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
No
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify) ✓
The number of attempts allowed can also be configured.
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes) ✓
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order) ✓
 - Hotspot questions (where users must select the correct area of a graphic) ✓
 - Drag-and-drop questions ✓
 - Other (please specify)

18. Provide any other information or notes relevant to the “Assessments” section.
- Meridian Global provides an advanced and integrated test creator and distribution system. Meridian offers a robust LMS test functionality without sacrificing the flexibility of SCORM. Recognizing the strengths of LMS testing tools and the limitations of current assessment SCOs, Meridian has developed a SCORM Test Suite. The test suite provides a central test bank that serves as a repository of all evaluation items, stored within an ODBC compliant database. Using the browser-based interface, assessment developers can assemble assessment SCOs for specific assessment requirements. The assessment SCO capability includes randomization of evaluation items, mixing various evaluation item types, and assessment duration. Once assembled, the assessment SCOs may be packaged within a SCORM course as a pre-test, lesson test, post-test, or anywhere within the learning path organization. The use of the central evaluation item repository realizes the flexibility and functionality of the LMS test tools while providing the ease of reuse and packaging through the creation of assessment SCOs and the SCORM interoperability. The test engine manages test questions at the learning objective level and tracks individual evaluation items (test questions), providing the necessary data for evaluation item analysis. The passing scores are set individually for each test. Tests can be available, under development, published or unpublished. Tests are comprised of groups, which in turn consists of questions. Each group of questions can be modified and changed and re-linked to the appropriate course(s). The number of questions that are presented in each group is determined on the Test Creator form. When tests are accessed by students, questions are randomly selected from all possible questions in the group. The number of questions presented from each group is determined when the group is created/edited. As with all other learning objects, assessments can be ordered/re-ordered in any*

fashion within the course. Both pre-class and post-class assessments can be captured on the student’s transcripts at the request of the training administrator. Course credit is automatically granted when a student achieves a passing score on a test.

Evaluations

- Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
- How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
- Does the LMS automatically link evaluation data to the reports available in the system?
Yes
- Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
Yes
- Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
- Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
- Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
- Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
- Does the LMS provide for time limits for evaluations?

- For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row)
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields ✓
 - Date fields ✓
 - Time fields ✓
 - Demographic information
 - Other (please specify)
11. Provide any other information or notes relevant to the “Evaluations” section.
- Meridian Global provides the capability to create surveys consisting of Likert scale, free-text/comment or a combination of responses. Surveys may be general-purpose (independent of specific functionality or content) or associated with courses for use as course evaluations. A given course evaluation may be associated with multiple courses.*

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports ✓
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports ✓
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses)
 - Other (please specify) ✓
Completely custom reports can be created within a third party tool and uploaded to the LMS for all users to access and run.
5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
65
7. List and briefly describe the standard, pre-configured reports available in the LMS.

Below is a partial list of our standard reports in Meridian Global LMS:

- **Classroom Course Scheduling**
 - ▶ Displays the active sections that are within or including the selected date range for all courses created in or shared to the current domain. The report contains one record for each instructor assigned to teach each event. Since sections are made up of events, the same section may appear more than once. The report indicates instructor and room usage. Authorized Users: Administrators, Report Managers.
- **Course and Content Ratings**
 - ▶ View courses and content items by rating. You may also view details about content ratings in this report. Authorized Users: All Users, according to your permissions. Content items that were created on or between the Start Date and the End Date are returned in the report. Courses and content items that do not have ratings do not display in the report. Courses include: online, classroom, curriculums, and tests. Content includes: documents, blogs, collaboration spaces, announcements, FAQs, surveys. Only active courses/content display in the report. Courses and content are filtered according to your permissions on the course/content. You can only see courses in the results that you have permissions to view, launch or manage.
- **Domain Listing**
 - ▶ Domain Listing (analysis grid). If the Domain Console has been activated, the Domain Listing report will be available, and it contains a list of all users of a particular domain. The list includes how the users are members of the domain (organization, job title, or explicitly as user) and the date they became a member. Users may appear in the report more than once, since users can become members of a domain as a user, as part of an organization, or by having a specific job title (roles are domain-specific, therefore users cannot become members of domains by being assigned to a role). Only users in enterprise roles will see the Domain menu as a report criterion. Authorized Users: Enterprise Administrator (can select from all domains), Domain Administrator (can select from any domains or sub-domains for which they are an administrator), Enterprise Reports Manager (can select from all domains), Domain Reports Manager (can only see results from domains in which they are a report manager).
- **Domain Report - Content Access**
 - ▶ Allows authorized users to view the courses and content items that have been accessed by users within the selected domain(s). The report also shows completions and the number of times each content item was accessed. The report can be filtered by domain (by users in Enterprise roles only), date range and content type. All courses/content for which a user has progress data are displayed in the report, regardless of content item activity or user's permissions on the content item. If a user has taken more than one section of a classroom course, each section is listed individually. Authorized Users: Enterprise Administrator (Can select from all domains), Domain Administrator (Can select from any domains for which they are an administrator, plus subs to those domains), Domain Reports Manager (Can only see results from domains in which they are a report manager)
- **Domain Report – Required Training**
 - ▶ Displays all users within the selected domain(s). For each user, the report displays all their training periods according to selected report criteria. Training periods are created for users based

The screenshot displays the Ad Hoc Report Builder interface. At the top, it shows 'Report Management' and 'Configuration' tabs. Below is a 'New Report' configuration window with a 'Show Minimum Attributes' table. The main area shows a data table with columns for Content Title, First Name, Last Name, Organization Title, Complete Date, and Progress Status. Below the table is a 'Compliance Chart' pie chart and a bar chart titled 'Organizational Training Risk'.

Content Title	First Name	Last Name	Organization Title	Complete Date	Progress Status
Understanding of our Code of Conduct and Integrity	Mark	Johnson	Product Management	11/21/2011	Completed
Understanding of our Code of Conduct and Integrity	Jane	Williams	Product Management	6/23/2011	Completed
Understanding of our Code of Conduct and Integrity	Victoria	Wu	Product Management	6/23/2011	Completed
Understanding of our Code of Conduct and Integrity	Mark	Johnson	Product Management	11/15/2011	Completed
Understanding of our Code of Conduct and Integrity	Larry	Learner	Product Management		Started
Understanding of our Code of Conduct and Integrity	Joe	Restaurant	Housekeeping	8/4/2011	Completed
Understanding of our Code of Conduct and Integrity	Lori	Savers	Food Services	11/15/2011	Completed
Understanding of our Code of Conduct and Integrity	Sean	Administrator	Food Services		Started
Understanding of our Code of Conduct and Integrity	Jack	HICKI	Maintenance	8/11/2011	Completed
Understanding of our Code of Conduct and Integrity	Thomas	Klopper	Professional Services	8/11/2011	Completed
Understanding of our Code of Conduct and Integrity	Walt	Lake	Phoenix Partner Network	3/22/2012	Completed
Understanding of our Code of Conduct and Integrity	Walt	Lake	Phoenix Partner Network	3/14/2012	Completed

Compliance Chart Data:

- Business (33%)
- Food Services (11)
- Housekeeping (3)
- Maintenance (3.3)
- Phoenix Partner Net
- Professional Services (4.67%)

Organizational Training Risk Data:

Organization Title	Compliance Issues
Corporate	311
Product Management	214
Other	~750

Meridian's ad-hoc reporting and advanced workforce analytics engine provide real-time, flexible reporting; custom graphical presentations, and a CLO learning portal. Meridian's ad-hoc custom report builder is designed for non-technical administrative users.

on their required training assignments. The report can only show past and current (incomplete training periods for which the start date but not due date has passed) training periods. The training periods returned in the report are those that are between or equal to the Start Date/Time and End Date/Time. To see current training periods, the user needs to select an end date in the future. All courses/content for which a user has progress data are displayed, regardless of activity or permissions. The user must have permissions to select one or more domains in order to get any results from the report. Only the users in the selected domain(s) will appear in the report. Authorized Users: Enterprise Administrator (Can select from all domains), Domain Administrator (Can select from any domains for which they are an administrator, plus subs to those domains), Domain Reports Manager (Can only see results from domains in which they are a report manager).

8. Briefly describe the process for creating ad-hoc reports in the LMS.

Reports are created using a template based tools which is fully browser based. Reports can be saved, shared, published and restricted if desired.

9. How many custom reports does the company typically develop for a client implementation of the LMS?

5

10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.

The varies greatly from customer to customer. Typically, customers use the built-in reporting tool to create their own reports.

11. Provide any other information or notes relevant to the “Reporting” section.

Unlimited dashboards and ad-hoc reporting

Support for Multiple Sites

- How does the LMS provide for multiple sites (e.g., for a client’s different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
 - Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify)
- How many clients have a multiple-site implementation of the LMS?
200
- On average, how many sites are part of a client’s multiple-site implementation of the LMS?
15
- Provide any other information or notes relevant to the “Support for Multiple Sites” section.

Domains allow for unique “portal” management through single or multiple points of entry. Meridian Global is designed for all audiences including users, managers, and administrators. With Meridian Global, users have access to courseware, web media, data, instructors, and other learners on demand. Any material designed to aid job performance is easily and readily available and completely integrated into a single web site. The User Interface is perhaps one of the most important aspects of an enterprise Learning Management System. Meridian Global’s industry-leading interface is intuitive, attractive, and easy to use. Meridian’s philosophy is to provide a vast array of tools which are easily and intuitively accessed. Whether the user is an administrator who must consistently access reporting data, or the user is accessing the site to complete required training, the experience is one that is not overwhelming. The User Interface may be dictated and configured by the central organization or a user may choose from a library of custom developed interfaces. Meridian provides the administrative tools, through web-based forms, to configure many aspects of the site without requiring professional services or support from Meridian.

Collaboration and Communication Tools

- Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Standard
 - End user-to-administrator e-mail
Standard
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Third-party
 - Live chats (for multiple end users)
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
- Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard
 - Live voice-over-IP
Third-party
 - Virtual whiteboard
Third-party
 - Virtual presentations (e.g., PowerPoint-driven)
Third-party
 - Screencasting
Third-party
 - Application-sharing
Third-party
 - Ability to associate a wiki with a course
Semi-standard
 - Single-point Web camera capability
Third-party
 - Multiple-point Web camera capability
Third-party

Meridian social learning allows for open and private collaboration and interaction between users worldwide via wikis, blogs, and chat. Social activities can be integrated with any content item in the system.

- Networking (e.g., ability for end users to connect with one another)
Semi-standard
 - Ability for each registered end user to have a blog
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
Yes. Custom.
 4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
Meridian feels strongly about building Communities of Practice whether it is among potential customers or in a corporate environment. Virtual team rooms provide collaboration areas with document and presentation sharing, blogs, a team calendar and e-mail management tools.

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Standard
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Semi-standard

- Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles sales tax, including variations based on the state or region
Completely custom
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Standard
- Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Standard
 - Automatically maintains order status that can be checked by end user
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Semi-standard

The Meridian Global LMS fully supports e-commerce transactions and provides clients with a way to manage the storefront needs of providing for-profit training to employees, contractors, customers and suppliers.

Microsoft Excel 2007: Getting Started

[Return](#)



Microsoft Excel 2007: Getting Started
 No Rating Available
 Course Provider : Meridian
 Cost : \$100.00
 Locale : English (United States)
 Duration (Hours) : 3.5

Credit(s) : 4 CEU

This course covers all of the features you need to get started using Microsoft Excel such as entering data, formatting, cell alignment, fonts, mathematical calculations, functions, and much more. Although knowledge of how to navigate in a Windows environment is helpful, this tutorial was created for the computer beginner. [More](#)

You have one or more required training assignments for this item. You may have completed this item for a previous training assignment, but you need to complete it again for the current training period.

You must enroll in this item if you want to access it.

This item is a prerequisite for one or more items.

Sections

Below is a list of current sections for this classroom course. You can manage your enrollment when you view the details of each section.

Title	Dates	Enrollment	Section Status	Section Format
Internal May Section	5/11/2012 2:00 PM - 5/11/2012 6:00 PM	Not Enrolled	Open (0/20)	Virtual

Shopping Cart

Review the items in your shopping cart and make final decisions about your order, then proceed through the checkout process to complete your order.

[Shopping Cart](#) [Shipping](#) [Payment Information](#) [Review Order](#) [Receipt](#)

Shopping Cart

Confirm that the correct items are in your shopping cart, make changes if needed, then click Checkout to go to the next step.

	Digital Content	Type	Cost	Quantity	Total
<input type="checkbox"/>	Microsoft Excel 2007: Getting Started		\$100.00	1	\$100.00
					Digital Content Subtotal: \$100.00
	Physical Products	Type	Cost	Quantity	Total
					Physical Products Subtotal: \$0.00

Discount Code [What's this?](#) [Apply](#)

Order Subtotal: \$100.00
 Discount: \$0.00
 Shipping and Handling: \$0.00
 Order Total (including shipping and handling): \$100.00

[Remove Item\(s\)](#) [Update Quantities](#)

[Terms and Conditions](#)

[Checkout](#)

- Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
 - 2Checkout
 - Authorize.Net
 - BluePay
 - CCAvenue
 - CyberSource ✓
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments ✓
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify)
 5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
No. PCI DSS is a component of the credit card clearing agency—such as Payflow. The LMS is transparent to PCI DSS
 6. Briefly describe the company’s preferred or recommended e-commerce system (which may or may not be the company’s own system) and how integration between the LMS and e-commerce system typically works.

Ecommerce is a core module available to customers with external audiences or requirements to offer and sell content to their partners. The Ecommerce module can be configured to support all content types within Meridian Global (online resources including video segments, .PDF files, PowerPoint presentations, products such as DVDs, online courses, classroom courses, classroom course sections, tests, curriculums). With Ecommerce, administrators can establish default and alternate costs by users or user groups such as job profiles, roles, or organizations. When searching for and selecting courses, users are presented with the cost applicable to their user profile (based on who they are, who they work for, etc.), and may add the course to their personal shopping cart. Users are routed through the purchase process when they are ready to checkout, using a credit card to make their purchase for online courses, .PDF files, products, etc. Checkout may include entering in their credit card information, entering in discount or other code, Purchase Order number (available in a forthcoming release), etc. Once their purchase has been made and validated, they have access to the content items they selected. Users will also be able to track the status of their product purchases through the “My Purchases” tool. Ecommerce includes integration with Pay Flow Pro (clients are responsible for establishing merchant account including initiating the Pay Flow Pro account). Other payment gateways may be supported at client request.

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
Yes
8. Provide any other information or notes relevant to the “E-commerce” section.
The Meridian Global LMS is geared toward extended enterprise learning and we have many features that support business to business and business to consumer workflows.

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Live telephone support for end users
Standard
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Standard
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Standard
 - Self-serve, searchable knowledge base for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Semi-standard
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Completely custom
 - Scheduled in-person training at client offices for administrators
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Completely custom
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
End user support is provided as an optional service in either M-F 8am-8pm or 24/7/ 365.
4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Standard three-tiered approach for our Administrator Help Desk support:
 - *Tier I - First Line Response to Administrator Inquiries. This includes general administrator questions, courseware management assistance, functional assistance, and limited "training support" to augment product documentation and formal training.*
 - *Tier II - Provide resolution of problems that cannot be solved at Tier I. This includes equipment configuration and protocol problems, and application software errors, deficiencies, and problems.*
 - *Tier III – Provide resolution of problems that cannot be solved at Tier II. This includes enterprise level problems and operating system problems for hosted applications.*
5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
End user support is delivered entirely upon custom plans and this is dictated on a case-by-case basis. End-user support typically follows our standard resolution and escalation SLA.
6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Mon-Sat 7am-7pm EDT.

7. Briefly describe the company's typical ongoing communication with its LMS clients.
Customers are constantly requested to provide feedback for the guidance of our product. Feedback can be solicited via surveys, by calling Meridian's executive team or via our regular user group meetings.
8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
Customers are constantly requested to provide feedback for the guidance of our product. Feedback can be solicited via surveys, by calling Meridian's executive team or via our regular user group meetings.
9. Provide any other information or notes relevant to the "Support and Training" section.
Meridian employs a dedicated project manager to manage all aspects of the relationship and serve as the primary contact for all customer service throughout the entire project lifecycle. This approach ensures that the support team is intimately familiar with the implementation at hand and any customizations to the system. Our clients have expressed great satisfaction with this approach and have compared it to the "lowest denominator" help desk support provided by our competitors and other enterprise application providers. Our standard support policy is to have the implementation project team serve as the primary support organization. Clients will have immediate access to its project team at any time during and after the implementation with an "in force" maintenance agreement. Technical support is available for up to five named administrators, see license agreement for details. Response times and issue resolution will vary with the complexity of the issue. The following is our standard support and service level agreement. Additional technical support hours are available for an additional fee. In accordance with the customer Support Services agreement, Meridian will provide the customer with technical support

for the Software by email telephone from 8:00 a.m. to 8:00 p.m. Eastern time on weekdays other than on Meridian holidays. Meridian uses a standard three-tier approach for Administrator Help Desk support. Problem routing and resolution of problems within our help desk structure allows for quality checkpoints along the way. Each project follows a standard approach to customer service and issue escalation.

Custom Programming and Content Development

- Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
- What approximate percentage of your client implementations to date have involved custom programming work?
50%
- Briefly describe the typical custom programming services provided for client implementations of the LMS.
A typical implementation of the Meridian LMS includes a workbook planning session, configuration, basic branding, data migration, and integration with the AMS, HRIS, ERP, or other data source. The open architecture of Meridian Global, with 1800 exposed APIs, allows clients to work freely with the software to minimize the amount of Meridian support required.
- Briefly describe the process for used for planning and implementing custom programming work.
The following is a typical example of the structure that has been used successfully by numerous Meridian clients. In some cases (especially in smaller organizations), one person will fill more than one role. Refer to the Project Management Approach for more detail about how product customizations are managed.

- *Project Leaders*
 - ▶ *One or more leaders within the client organization with the resources and authority to guide implementation*
 - ▶ *Roles:*
 - ◆ *Build and maintain working group(s)*
 - ◆ *Project Management (schedule, reporting, financial oversight)*
 - ◆ *Communicate with others in organization*
 - *Strategic Steering Committee*
 - ▶ *Create/validate project goals and implementation decisions to ensure alignment with strategic goals of the organization*
 - ▶ *Roles:*
 - ◆ *Help attain resources for implementation*
 - ◆ *Approve or respond to the recommendations of the Implementation Team*
 - ◆ *Communicate project goals and successes to organization*
 - ◆ *Attend regular update meetings to validate direction and offer input*
 - *Implementation Team*
 - ▶ *Represent constituencies throughout organization in functional decision-making and deployment*
 - ▶ *Roles:*
 - ◆ *Set project goals and objectives*
 - ◆ *Develop functional requirements*
 - ◆ *Validate Technical requirements (servers if internally hosted, integrations, security, etc.)*
 - ◆ *Develop implementation plan*
 - ◆ *Support implementation*
 - ◆ *Communicate project goals and successes to organization*
 - ◆ *Provide LMS subject matter expertise to others within the organization*
5. Please specify the location (by time zone) of personnel involved in custom programming.
- *-7, -6, -5, and -4 UTC*
6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
- Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.
- 6, -5, and -4 UTC*
8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.
- Meridian’s consulting services are provided in-house and the lessons learned from 16 years of consulting experience allow us to solve virtually any custom challenge.*

SmarterU.com Neovation Corporation

LMS Version: *Not applicable as SmarterU.com follows a continuous-release cycle.*

Value proposition: *We provide a very cost effective, scalable platform which allows associations to benefit from leveraging online training either as a membership benefit, to for revenue generation.*

Top clients (associations): *Canadian Association of Management Consultants • Nova Scotia College of Physiotherapists • Society of Manitobans with Disabilities • Sport Physiotherapy Canada • Business Networking International*

Top clients (non-associations): *Sunwing Travel Group • The UPS Store • Druxy's • Oxford Learning Centers • The Winnipeg School Division*

URL for more information about the LMS:
<http://www.smarteru.com>

Three-year pricing: \$10,500 to \$150,000

Hosting: *By company only*

Neovation Corporation

449 Provencher Blvd.
Winnipeg MB R2J 0B8
Canada

204.885.2469

dcb@smarteru.com

<http://www.smarteru.com>





Our Take on SmarterU.com Some Highlights

Neovation has only recently turned its attention to associations, but president Dan Belhassen sees parallels between the way associations and their regional chapters behave and the way franchisers work—and SmarterU.com has a strong position in franchise industry market. SmarterU.com isn't trying to compete with enterprise-level solutions like Saba or Blackboard; it focuses instead on offering powerful features in a system that's not intimidating for administrators or end users.

- SmarterU.com comes with a simple built-in, no-additional-fee-required course development tool. Belhassen reports that most clients—even those that author in Articulate Storyline, Captivate, and the like—make use of this low-learning-curve tool for quick, memo-like trainings. It should be noted, however, that courses created in SmarterU.com are designed to be delivered within the system—they do not export into SCORM or AICC-compliant files.
- For a basic system, SmartU.com offers relatively sophisticated quiz authoring capabilities that include the ability to pool and randomize questions, ask questions based on a video or document, and weight the value of responses.
- The system is multi-lingual—10 languages (including Arabic) are available out of the box, and the system is architected to facilitate adding other languages. On first log-in, users are prompted to specify their preferred language, and the system remembers that, though users can update their preference at any time.
- While the platform doesn't have any stock integrations with association management systems, SmarterU.com has done a number of integrations with LDAP, Active Directory, and other systems. What's more, the company's building an integration with GoogleApps due out in early 2013.
- New features planned for release in 2013 include a supervisor dashboard to enable anyone supervising a group of learners to track each learner's activity and the ability to schedule Webinars as learning activities in the LMS and mark attendance.

Given that it offers the core abilities most organizations would want from an LMS in a relatively straightforward, easy-to-learn environment, SmarterU.com could be a good fit for the smaller associations (10,000 or fewer members) the company feels are often underserved by technology vendors.

General Company Information

1. When was the company founded?
2009
2. How many employees does the company currently have?
15
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
SmarterU Learning Solutions.
5. Provide the company's contact information.
*449 Provencher Blvd.
Winnipeg, Manitoba
R2J 0B8
Canada
dcb@smarteru.com
(204) 885-2469*
6. Provide the URL for the company's Web site.
http://www.smarteru.com
7. Provide any other information or notes relevant to the "General Company Information" section.
—

General LMS Information

1. What is the name of the LMS product?
SmarterU.com
2. Provide the product version described in this survey response.
N/A continuous releases.
3. When was the first version of the LMS initially released?
6/15/2006
4. Briefly describe the upgrade cycles for the LMS.
We have monthly feature releases, which are almost entirely based on user requests - we pride ourselves in being highly responsive.
5. How many associations use this LMS?
5
6. How many organizations in total use this LMS, including associations?
50
7. How many end users are registered in the single largest client implementation hosted by

the company?

5,000

8. How many end users are registered in the single largest client implementation hosted by the client?
Not applicable
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
50,000
10. Briefly describe the value proposition for this LMS as it applies to associations.
We provide a very cost effective, scalable platform which allows associations to benefit from leveraging online training either as a membership benefit, to for revenue generation.
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
30%
 - 500 to 2,499 registered end users
50%
 - 2,500 to 4,999 registered end users
20%
 - 5,000 to 9,999 registered end users
0%
 - 10,000 to 24,999 registered end users
0%
 - 25,000 or more registered end users
0%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of individual members in the association?
 - 1,000 or less
30%
 - 1,001 to 5,000
60%
 - 5,001 to 10,000
10%
 - 10,001 to 25,000
0%
 - 25,001 to 50,000
0%

- 50,001 to 100,000
0%
 - More than 100,000
0%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
-
- Less than 100
 - 101 to 200
 - 201 to 500
 - 501 to 1,000
 - 1,001 to 5,00
 - More than 5,000
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
-
15. Please list the company's top *association* clients.
- Canadian Association of Management Consultants • Nova Scotia College of Physiotherapists • Society of Manitobans with Disabilities • Sport Physiotherapy Canada • Business Networking International*
16. Please list the company's other (non-association) top clients.
- Sunwing Travel Group • The UPS Store • Druxy's • Oxford Learning Centers • The Winnipeg School Division*
17. Provide a URL for more information about the LMS.
- <http://www.smarteru.com>*
18. Provide any other information or notes relevant to the "General LMS Information" section.
- The SmarterU platform can integrate with your association management platform, and website to seamlessly fit within your environment.*

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple

implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

90

Typical

30

Simple

1

2. Briefly describe the implementation process.
Depending on the size of the organization, they will either use the application directly, or we will provide a comprehensive onboarding service which could include developing integrations.
3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.
 - *Account Manager*
 - *Training & Onboarding Specialist*
 - *Optionally:*
 - *Instructional Designer*
 - *Programmer*
4. Please specify the location (by time zone) of company personnel involved in implementation.
+7, +7:20, +7:30, +8, +8:30, +2, +8:45, +3, +9, +3:30, +9:30, +4, +10, +4:30, +4:51, +5, +5:30, +5:40, +5:45, +6, and +6:30 UTC
5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
Project Manager.
6. Provide any other information or notes relevant to the "LMS Implementation" section.
We customize the implementation process according to our company's needs and available resources.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$3,500
 - 2,500
\$10,000
 - 5,000
\$13,000
 - 10,000
\$16,000
 - 25,000
\$30,000
 - Unlimited
\$50,000
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$10,500
 - 2,500
\$30,000
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

 - 5,000
\$36,000
 - 10,000
\$48,000
 - 25,000
\$90,000
 - Unlimited
\$150,000
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

 - 50
 - 2,500
 - 5,000
 - 10,000
 - 25,000
 - Unlimited
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

 - 500
 - 2,500
 - 5,000
 - 10,000
 - 25,000
 - Unlimited
5. Briefly describe the pricing model for the LMS.

We offer flexible pricing strategies, typically based on the number of users.

6. Briefly describe the payment schedule.
Typically payable monthly.
7. Briefly describe pricing for additional services.
Full customer service/technical support is included. Custom development and other services are available "on demand".
8. Provide any other information or notes relevant to the "Pricing" section.
Custom pricing schemes are available based on client needs.

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Not applicable
2. Briefly describe the technical framework and code structure of the LMS.
SmarterU is a multi-tenanted cloud based application, which we provide as a hosted service for our clients.
3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.
We can provide custom migration and integration services, to share data, push/pull, or through API/web services.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
We are hosted within a private virtualized environment, which means we can scale to handle tens of thousands of simultaneous users.
5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
There are no specific maximum limits.
6. Provide any other information or notes relevant to the "Technology" section.
—

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
Any reasonably recent browser can be used (IE 7+, Safari, Chrome, Firefox) on PC, MAC and most tablet platforms.
2. What are the technical requirements for an *administrator* to access the LMS?
Any reasonably recent browser can be used (IE 7+, Safari, Chrome, Firefox) on PC, MAC and most tablet platforms.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the "System Requirements" section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
20%
2. Briefly describe the typical types of integration for the LMS.
Typical integrations include single sign-on, LDAP/Active Directory or other back end user synchronization.
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
SOAP or XML based API.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
Custom project management process, based on the specific integration needs.

5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect
 - Elluminate
 - Genesys
 - GoToWebinar ✓
 - Microsoft Live Meeting
 - ReadyTalk
 - WebEx ✓
 - Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify)
6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
 - Aptify (Aptify)
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid)
 - CRM for Members (ProTech)
 - iMIS (Advanced Systems International)
 - IRMembership (IRM Systems)
 - Members360 (Affiniscape)
 - netFORUM (Avecetra)
 - Office Manager (internet4associations)
 - Personify (TMA Resources)
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS ✓
 - The LMS has never been integrated with an AMS.
 - Other (please specify)
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
 - ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS. ✓
 - Other (please specify)
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.

No
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.

Yes. Proprietary ecommerce systems.
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.

Yes. Articulate. Captivate. Storyline.
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.

No
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.

—
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.

No
14. Provide any other information or notes relevant to the “Integration and Interoperability” section.

—

Standards and Guidelines

- Does the LMS produce content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards. ✓
 - Other (please specify)
- Can the LMS play content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify) ✓
TinCan (as of Jan/2013).
- Provide any other information or notes relevant to the “Standards and Guidelines” section.
—

Hosting

- Is the LMS available as a *company-hosted* solution?
Yes
- How many LMS installations are hosted by the *company*?
100
- Is the LMS available as a *client-hosted* solution?
No

- How many LMS installations are hosted by the *client*?
Not applicable
- How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
- If the company’s LMS hosting is provided by a partner or partners, please list the name(s).
Not applicable
- Briefly describe the company’s preferred or recommended hosting option.
Not applicable
- If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
We schedule maintenance after 11pm ET, or Saturday ET for larger updates. At least a week’s notice is issued for scheduled maintenance.
- If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing
 - Yes, when requested for an additional fee ✓
 - No
 - Not applicable because the company does not host LMS installations
- Provide any other information or notes relevant to the “Hosting” section.
—

Personalization

- Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes

2. Can end users specify their preferred language (which may differ from the default site language)?

Yes

3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?

Yes

4. Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?

No

5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?

No

6. Provide any other information or notes relevant to the "Personalization" section.

—

4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.

No

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.

No

6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.

No

7. Provide any other information or notes relevant to the "Interface Configuration" section.

—

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).

Yes. We provide customized branding based on the client's needs.

2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).

Yes. Follows the same branding as the student interface (overall branding).

3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.

No

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term "student" with the term "learner" throughout the site)?

Yes

2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term "student" with the term "learner" throughout the site)?

No

3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?

Yes

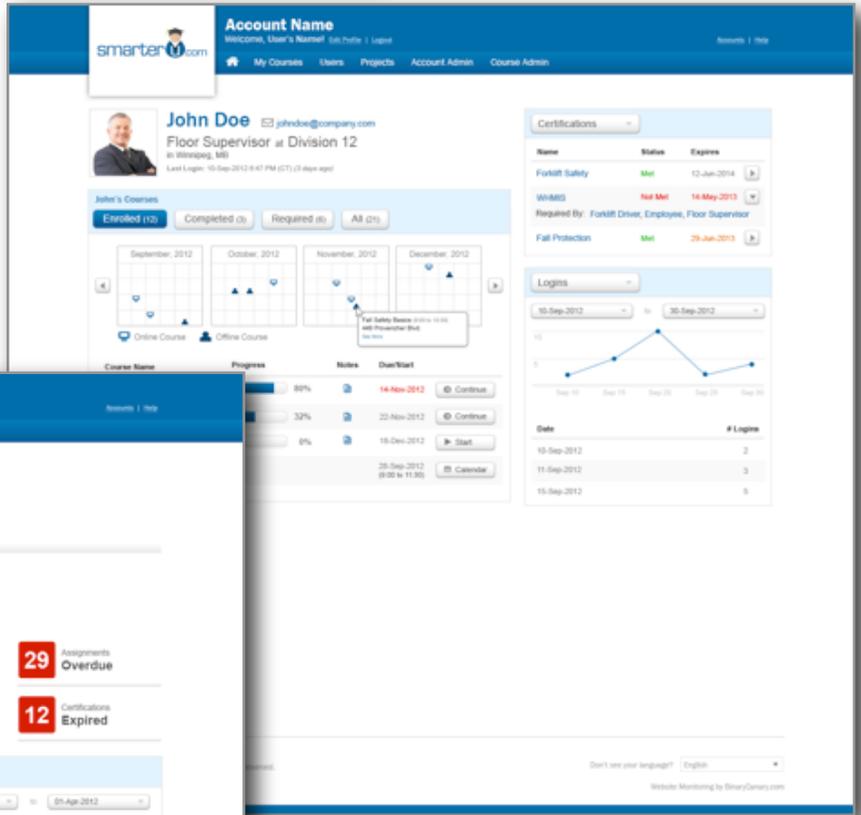
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?

Yes

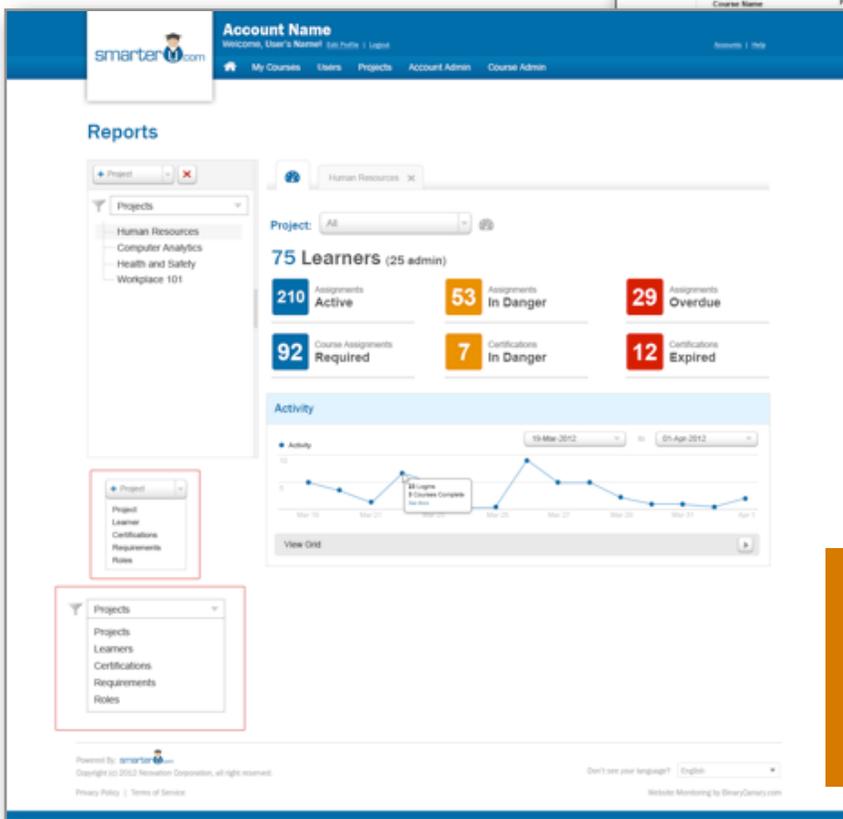


Each SmarterU.com account can have a customized log-in page, which can include a background image and corresponding content (in the example here, the client chose to include a video).

The SmarterU.com learner dashboard, displayed after log-in, shows information about the user's courses, certifications, and activity.



This sample supervisor dashboard screen highlights exceptions and allows the supervisor to quickly drill down into specific areas for detailed reports.



5. Can administrators change the default time zone used for formatting dates and times in the LMS?
No
6. In how many countries has the LMS been implemented for clients?
5
7. Please list the countries where the LMS has been implemented for a client.
Canada, Oman, Mexico, Singapore, United Kingdom, United States.
8. In how many languages has the LMS been implemented for clients?
4
9. Please list the languages in which the LMS has been implemented for a client.
Arabic, English, French, Spanish.
10. How many language packs are available for the *end-user* view of the LMS?
10
11. Please list the languages for which a language pack is available for the *end-user* view.
Arabic, English, Filipino, French, German, Hindi, Korean, Simplified Chinese, Spanish, Thai.
12. How many language packs are available for the *administrator* view of the LMS?
1
13. Please list the languages for which a language pack is available for the *administrator* view.
English.
14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
—

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓

- Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide).
 - End users can view and search catalogs before authenticating (logging in).
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog
 - Search across multiple catalogs
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for other end users
 - The LMS does not support search by end users. ✓
 - Other (please specify)
 3. What types of search are available to *administrators* in the LMS?
 - Search within a single catalog
 - Search across multiple catalogs ✓
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for end users
 - Search for other administrators
 - The LMS does not support search by administrators.
 - Other (please specify)
 4. Provide any other information or notes relevant to the “Search and Catalogs” section.
—

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars)
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course.
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)
3. Does the LMS provide the ability to author learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
A combination of WYSIWYG editor for text/html pages, long with specific tools to create synchronized video, learning games, and assessments/quizzes/exams.
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
Uploaded through video task editor.
5. Does the LMS support offline authoring of learning content?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the LMS supports offline authoring.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Check in/ check out functionality
Unavailable
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Unavailable
 - Ability to monitor progress on tasks
Standard
 - Ability to add internal comments (viewable only by other administrators) to content
Standard

The SmarterU.com course dashboard provides a central location to view all courses in the system and drill down to specifics or edit the courses.

The course workscreen is a drill-down from the course dashboard, showing details about a particular course.

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 8. Can the LMS generate printer-friendly content?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.

—
 9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.

—
 10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
 - Browser-delivered online content ✓
 - Downloadable version
 - CD or DVD
 - HTML
 - SWF
 - PDF
 - Other (please specify)
 12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
 - Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
Many of our clients use our integrated content authoring system, however, other standard authoring tools can be used.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
—

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Administrative calendar for courses
Unavailable
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Unavailable
 - Personnel management (for scheduling instructors and facilitators)
Standard

- Facility management (for scheduling rooms)
Standard
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Unavailable
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Unavailable
2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
No
 3. Provide any other information or notes relevant to the "In-person, Place-based Courses" section.
—

Webinars

1. Does the LMS provide integrated Webinar functionality?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
2. Briefly describe the company's preferred or recommended Webinar software.
—
3. Provide any other information or notes relevant to the "Webinars" section.
—

Registration

1. How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
4. Does the LMS provide self-serve password recovery help for end users?
Yes
5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
7. Can the fields for end user profiles be added, edited, and deleted?
No
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
No
10. Provide any other information or notes relevant to the “Registration” section.
—

Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval
 - Other (please specify)
2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
Yes
3. How administrators configure enrollment options?
 - Sitewide ✓
 - At the catalog level
 - By course group ✓
 - On a course-by-course basis
 - On an end user-by-end user basis
 - Other (please specify)
4. Can enrollments occur based on end user-specific criteria?
 - The end user’s role in the system
 - The end user’s score on an assessment
 - The end user’s completion of prerequisites for a particular course
 - The LMS does not support enrollment based on end user-specific criteria. ✓
 - Other (please specify)
5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?
Yes
6. Provide any other information or notes relevant to the “Enrollment” section.
—

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
No
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
No
3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS)
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS)
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement)
 - The LMS does not allow credit to be assigned to learning content. ✓
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload
- By the end user claiming the credit and an administrator approving the claim
- The LMS does not support credit for this type of learning content. ✓
- Other (please specify)
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
 - By the user claiming the credit
 - By the user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
 - Yes, on a sitewide basis
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)

9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users) ✓
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline)
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
No
12. Can end users view and print their own transcripts?
No
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
No
14. How many clients use the LMS to manage continuing education or certification?
30
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU)
 - Continuing medical education (CME)
 - Continuing legal education (CLE)
 - Continuing professional education (CPE)
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential
 - Credit towards a degree at a college or university
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify)
16. Provide any other information or notes relevant to the "Managing Continuing Education and Certification" section.
—

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another may only require users to achieve a 70% to pass)?
Yes

4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
- Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
- Per question ✓
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option ✓
 - Based on which distracter the end user selected
 - Per assessment ✓
 - Based on the end user's overall performance on the assessment
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
- Yes*
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
- No*
8. Does the LMS automatically link assessment data to the performance reports available in the system?
- No*
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
- Yes*
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
- Yes*
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
- Yes*
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
- Yes*
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
- No*
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓

- For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order) ✓
 - Hotspot questions (where users must select the correct area of a graphic) ✓
 - Drag-and-drop questions ✓
 - Other (please specify)
18. Provide any other information or notes relevant to the “Assessments” section.
-

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
No
2. How does the LMS allow evaluations to be used?
Not applicable
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course)
 - Ability to associate an evaluation with an online course
3. Does the LMS automatically link evaluation data to the reports available in the system?
Not applicable
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
Not applicable
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Not applicable
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Not applicable
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Not applicable
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Not applicable
9. Does the LMS provide for time limits for evaluations?
Not applicable
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013)
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated)
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
Not applicable
 - Multiple-choice questions (single answer)
 - Multiple-select questions (multiple answers)

- Matrix of choices (single answer per row)
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales)
 - Text box (single field)
 - Text boxes (multiple fields)
 - Number fields
 - Date fields
 - Time fields
 - Demographic information
 - Other (please specify)
11. Provide any other information or notes relevant to the “Evaluations” section.
-

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users’ profiles or store additional metadata on courses)
 - Other (please specify)
5. How are the LMS reports made available?

- View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
6
7. List and briefly describe the standard, pre-configured reports available in the LMS.
Learner results. Quiz analysis. Supervisory. Learner list. Course Listing.
8. Briefly describe the process for creating ad-hoc reports in the LMS.
Not applicable
9. How many custom reports does the company typically develop for a client implementation of the LMS?
0
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
Not applicable
11. Provide any other information or notes relevant to the “Reporting” section.
-

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client’s different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not).

- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts).
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports.
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
10
 3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
10
 4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.

There are two options - you can have an unlimited number of "sub-accounts" within an actual site, or have separate sites. The difference is that sub-accounts all share the account branding, whereas separate sites can have custom branding.

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Standard
 - End user-to-administrator e-mail
Standard
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Completely custom
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Completely custom
 - Instant messaging (one-on-one)
Unavailable
 - Live chats (for multiple end users)
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Third-party
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Third-party
 - Live voice-over-IP
Third-party
 - Virtual whiteboard
Third-party
 - Virtual presentations (e.g., PowerPoint-driven)
Standard
 - Screencasting
Third-party
 - Application-sharing
Third-party
 - Ability to associate a wiki with a course
Third-party
 - Single-point Web camera capability
Third-party

- Multiple-point Web camera capability
Third-party
 - Networking (e.g., ability for end users to connect with one another)
Third-party
 - Ability for each registered end user to have a blog
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
 4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
—

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Semi-standard
 - Handles transactions for online courses
Semi-standard
 - Handles transactions for other online items (e.g., PDF study guides)
Semi-standard
 - Handles transactions for physical items (e.g., books or CDs)
Semi-standard
 - Automatically handles payment by credit card (no manual intervention needed)
Completely custom
 - Handles payment by check (manual intervention needed)
Completely custom
 - Handles payment by invoice (manual intervention needed)
Completely custom

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles sales tax, including variations based on the state or region
Completely custom
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Completely custom
 - Multiple shipping options can be configured for physical goods
Completely custom
 - Customizable e-mail message to users making the purchase
Completely custom
 - Automatic e-mail message on purchase to administrators
Completely custom
 - Customizable e-mail message to administrators
Completely custom
 - Automatically maintains order status that can be checked by end user
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
 3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Completely custom
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Completely custom

- Handles discounts (e.g., by accepting discount codes)
Completely custom
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris ✓
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments ✓
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify)
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
—

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
No
8. Provide any other information or notes relevant to the "E-commerce" section.
—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Completely custom
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Completely custom
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Standard
 - Self-serve, searchable knowledge base for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Self-serve online training (e.g., tutorials) for end users
Standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Completely custom
 - Scheduled online training (e.g., Webinars) for administrators
Standard

- Scheduled in-person training at client offices for end users
Standard
 - Scheduled in-person training at client offices for administrators
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Available on a contracted basis.
 4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Regular support 8-5pm M-F by phone and email. 24x7 emergency support for administrators.
 5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Available on a contracted basis.
 6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Regular support 8-5pm M-F by phone and email. 24x7 emergency support for administrators.
 7. Briefly describe the company's typical ongoing communication with its LMS clients.
A combination of in-person, email and live Internet webinar, based on the situation and need.
 8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
End user support is only provided on a contracted basis.

9. Provide any other information or notes relevant to the "Support and Training" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
10%
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
Integrations with third party systems, and custom features.
4. Briefly describe the process for used for planning and implementing custom programming work.
Standard best-practices in development and project management.
5. Please specify the location (by time zone) of personnel involved in custom programming.
0, +0:20, +0:30, +1, +2, +3, +3:30, +4, +4:30, +4:51, +5, +5:30, +5:40, +5:45, and +6 UTC.
6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.
0, +0:20, +0:30, +1, +2, +3, +3:30, +4, +4:30, +4:51, +5, +5:30, +5:40, and +5:45 UTC.

8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.

—

Freestone Peach New Media



Industry focus: mandatory continuing education fields

LMS Version: 2012

Value proposition: *Freestone is a Learning Content Management System that drives the full service webinar, webcast, podcast, CE credit and e-commerce solutions offered by Peach New Media. Clients may use the platform a la cart for small solutions such as webinar/webcast registration, archive streaming content hosting; or full service, robust online professional development platforms, where they integrate their Social Media (twitter, facebook, etc.) with their online programs.*

Top clients (associations): *None provided by company, as the information is considered confidential.*

Top clients (non-associations): *None provided by company, as the information is considered confidential.*

URL for more information about the LMS: • <http://www.peachnewmedia.com/solutions/freestone-lcms>

Three-year pricing: *None provided by company, as pricing varies from client to client.*

Hosting: *By company only*



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Our Take on Freestone Some Highlights

Formed through the 2009 merger of Boston Conferencing and Impact Media Solutions (both founded in 2001), the company has traditionally focused on Webinar services and capturing content from place-based conferences. The Freestone platform, however, has moved the company into traditional learning management system territory.

A key strength of Freestone is tracking continuing education credit associated with Webinars, teleseminars, Webcasts, and live conferences. Peach has particular experience in the area of continuing legal education but has worked with a range of clients in health care, financial services, and other industries.

- Freestone is based on widgets, making it possible to configure the system in a number of different ways and to turn features on and off easily.
- Peach has integrated popular social media options into the online learning environment. Freestone features modules that enable organizations to integrate content from blogs, YouTube, Facebook, LinkedIn, Twitter, and other sources. An Evernote integration supports users taking and sharing notes while learning.
- Freestone can provide the catalog and storefront or can integrate with another system for that functionality. Freestone offers standard integration bridges for Personify, iMIS, and Avector's AMS products, and APIs give Peach the flexibility to integrate with other system.
- The ticket/credit/subscription functionality (different clients call the functionality by different names) allows associations to make bulk sales to both individuals and organizations.
- Peach is addressing the "one-off" mentality by developing a defined structure to differentiate "classes" (one-off experiences) from "courses" (a collection of classes) and "curricula" (a collection of courses). Peach wants to help its clients make it clearer to learners what's available as part of a learning experience and how it fits together.
- The Peach system allows credit types to be highly customized and supports the sale of credit separate from courses (i.e., the course itself may be free, but if an end user wants credit for the course, then she must pay). Additionally, a range of "industry standard" credit categories are programmed in Freestone to facilitate credit management.
- The same Freestone interface can be delivered via Flash to laptops and desktops or HTML5 for tablets and smartphones. The system automatically detects the user's device and serves up the right version.
- Peach offers its Virtual Study Groups through a Freestone-Higher Logic integration. VSGs support social learning by blending different tools and delivery options—live Webinars, social media, private discussion forums, etc.

For organizations delivering a lot of Webinar- and place-based learning, Freestone provides a solid platform for delivering and tracking it, and the support of Peach New Media in managing it frees association staff to focus on other areas. While it may feel a little pricey for associations just beginning to dip their toes in the online learning waters or not appeal as strongly to complete do-it-yourself organizations, Peach may be a good fit for associations that have had initial success delivering credit or certifications programs and are looking for a full-service partner to help take them to the next level.

General Company Information

- When was the company founded?
2001
- How many employees does the company currently have?
35
- Is the company privately or publicly held?
Private
- Briefly describe the top three products or services the company offers.
Managed Webinars and Webcasting. Online Continuing Education. Learning Content Management System.
- Provide the company's contact information.
*Ryan Graham, VP Sales & Marketing
1100 Circle 75 Parkway, Suite 900
Atlanta, GA 30339
USA
info@peachnewmedia.com
866-702-3278*
- Provide the URL for the company's Web site.
http://www.peachnewmedia.com
- Provide any other information or notes relevant to the "General Company Information" section.

We believe in the power of knowledge sharing: the power to make a difference, the power to change society, and the power to improve our lives. This core belief drives everything we do, and it's why we're passionate about helping organizations share their stories with the world.

General LMS Information

- What is the name of the LMS product?
Freestone
- Provide the product version described in this survey response.
2012
- When was the first version of the LMS initially released?
9/1/2002
- Briefly describe the upgrade cycles for the LMS.

We have many small and large feature releases regularly. One main focus is on building out our API further. Another focus is on improved usability in the Admin Controls of the LMS. Over 200 associations running Freestone regularly request features that are rolled out on a weekly basis.

peach new media

Dashboard Seminars Customers Reports Account Welcome Johnson Cook

Submit Tickets & Ideas

Quick Links

- Create New Seminar
- View Orders
- View Reports
- Storefront
- My Account

Welcome

Welcome to your SLM Dashboard! This is where you'll be able to track your top seminars, your sales, and your customers all in one convenient view. The first step is to add some Seminars. Click "Add Seminar" on the left side to get started.

If you have any questions click the "Help Center" link at the bottom of any page to submit a help ticket to our SLM Peaches and we'll help you out.

Sales Summary

Thirty day sales trends

\$1,870.55
Last 30 Days

\$1,238.39
Previous 30

\$9.54
Average \$/Registration (Last 30 Days)

Seminar Overview

- 195** Published Seminars
- 8** Average Registrations Per/Event
- 1649** Total Registrations

Highest Performers

- Compassion Fatigue: 216
- Too Tired to Care - Webinar: 88
- Pulmonary Exam: Mastering the Assessment - Webinar: 77
- Nursing Documentation: Legally-Proven: 77

Administrative dashboard in Freestone

5. How many *associations* use this LMS?
200
6. How many organizations in total use this LMS, including associations?
225
7. How many end users are registered in the single largest client implementation *hosted by the company*?
250,000
8. How many end users are registered in the single largest client implementation *hosted by the client*?
Not applicable
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
1,000,000
10. Briefly describe the value proposition for this LMS *as it applies to associations*.
Freestone is a Learning Content Management System that drives the full service webinar, webcast, podcast, CE credit and e-commerce solutions offered by Peach New Media. Clients may use the platform a la cart for small solutions such as webinar/webcast registration, archive streaming content hosting; or full service, robust online professional development platforms, where they integrate their Social Media (twitter, facebook, etc.) with their online programs.
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
- 499 or fewer registered end users
5%
 - 500 to 2,499 registered end users
0%
 - 2,500 to 4,999 registered end users
30%
 - 5,000 to 9,999 registered end users
30%
 - 10,000 to 24,999 registered end users
15%
 - 25,000 or more registered end users
20%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
- 1,000 or less
5%
 - 1,001 to 5,000
5%
 - 5,001 to 10,000
30%
 - 10,001 to 25,000
20%
 - 25,001 to 50,000
20%
 - 50,001 to 100,000
15%
 - More than 100,000
5%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
- Less than 100
5%
 - 101 to 200
5%
 - 201 to 500
30%
 - 501 to 1,000
20%
 - 1,001 to 5,000
20%
 - More than 5,000
20%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
Continuing Legal Education, Continuing Medical Education, Continuing Professional Education (accounting) and other Mandatory Continuing Education fields.
15. Please list the company's top *association* clients.
Confidential at request of clients.

16. Please list the company's other (non-association) top clients.
Confidential at request of clients.
17. Provide a URL for more information about the LMS.
<http://www.peachnewmedia.com/solutions/freestone-lcms>
18. Provide any other information or notes relevant to the "General LMS Information" section.
Peach's LMS also consists of a robust webcasting platform to help produce high quality video and slide based events.

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)
Complex
45
Typical
20
Simple
1
2. Briefly describe the implementation process.
Implementation process managed by a dedicated Implementation Manager in Coordination with the client's Account Director. Branding is setup by Peach based on the client's requirements and branding specifications. If Freestone member/non-member controls are used, member databases are imported or single-sign-on processes planned and implemented. Past archive programs are loaded and data for future events/programs is

entered as soon as it becomes available by the client.

3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.
An Account Director at Peach New Media will be assigned to manage the entire relationship with the association. For the integration and other start-up projects, the client will also have an Implementation Manager. The Account Director coordinates between all the teams at PNM (portal setup, graphic design, webinar moderators, media production) to implement a client Freestone portal site.
4. Please specify the location (by time zone) of company personnel involved in implementation.
-7, -6, and -5 UTC
5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
For AMS, CMS, and external LMS, integrations, the Peach Implementation team will work with the appropriate parties to manage this integration.
6. Provide any other information or notes relevant to the "LMS Implementation" section.
Freestone has an Open API. If purchased, this allows Peach clients to do much of the integration work on their own.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of

registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

—

- 50
- 2,500
- 5,000
- 10,000
- 25,000
- Unlimited

2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

—

- 500
- 2,500
- 5,000
- 10,000
- 25,000
- Unlimited

3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

- 500
- 2,500
- 5,000
- 10,000
- 25,000
- Unlimited

4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

- 500
- 2,500
- 5,000
- 10,000
- 25,000
- Unlimited

5. Briefly describe the pricing model for the LMS.

Pricing model is typically based on activity. After standard setup and integration fees, clients will pay a monthly license fee, per course or event fee, then per registration, CE submission, or other activity.

6. Briefly describe the payment schedule.

Setup fees (if any) are due at contract signing. License fees, delivery fees, revenue share, or royalties are paid or invoiced monthly. Content production and professional services are invoiced at the time of the program.

7. Briefly describe pricing for additional services.

—

8. Provide any other information or notes relevant to the “Pricing” section.

Peach New Media customizes all pricing for our clients. Please contact us at Solutions@peachnewmedia.com for customized pricing.

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?

SaaS only.

2. Briefly describe the technical framework and code structure of the LMS.
Freestone operates on a LAMP infrastructure, utilizing both streaming Flash and Silverlight for cross-platform streaming media. Front-end components use a mix of custom built and open source javascript frameworks.
3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.
In addition to our Open API that gives direct database read and write access from other platforms, Freestone offers full integration with other LMS's and AMS's. From single-sign-on, shared shopping cart, CE credit transcript integration, two-way e-commerce activity reporting, and online event registration/login.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
Freestone has handled single live webcast/webinar events with 5000+ simultaneous users streaming live and on-demand content.
5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
Peach New Media does not limit bandwidth, storage, or amount of content for standard clients.
6. Provide any other information or notes relevant to the "Technology" section.
—

System Requirements

1. What are the technical requirements for an end user to access the LMS?
We are fully cross-browser, cross-platform compatible, including mobile devices.
2. What are the technical requirements for an administrator to access the LMS?
Admin access requires no special system requirements.
3. Is the end-user view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes

4. Is the administrator view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the "System Requirements" section.
For authoring SCORM courses in Freestone, users will require an Authoring tool. Otherwise, all administrative functions are web-based.

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
80%
2. Briefly describe the typical types of integration for the LMS.
Course level integration, calendar integration, events widgets, RSS feeds on either site, single sign-on, shared shopping cart, CC payment gateway integration, CE credit activity synchronization.
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
XML/web-services and others.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
—
5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect ✓
 - Elluminate
 - Genesys ✓
 - GoToWebinar ✓
 - Microsoft Live Meeting ✓
 - ReadyTalk ✓
 - WebEx ✓
 - Completely custom (non-commercial) Webinar system ✓
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify) ✓
Freestone's Delivery Interface offers the most integration.

6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
- Aptify (Aptify) ✓
 - Association Anywhere (ACGI) ✓
 - ClearVantage (Euclid)
 - CRM for Members (ProTech) ✓
 - iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap) ✓
 - netFORUM (Avectra) ✓
 - Office Manager (internet4associations)
 - Personify (TMA Resources) ✓
 - TIMSS (TMA Resources) ✓
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS ✓
 - The LMS has never been integrated with an AMS.
 - Other (please specify) ✓
YourMembership, MemberClicks.
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
- ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal ✓
 - Ektron
 - Joomla! ✓
 - Microsoft SharePoint Server
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS ✓
 - The LMS has never been integrated with a CMS.
 - Other (please specify)
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
Yes. —
9. Has the LMS been tested for interoperability with any e-commerce systems, whether

third-party or proprietary? If yes, please specify which e-commerce systems.

Yes. iMIS, Avectra, other AMS payment process solutions, and Paypal's Verisign Payflow Pro.

10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
Yes. Any SCORM conformant authoring tools, free or paid, such as Articulate.
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
No
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
Yes. Any web-based survey with a URL can be integrated. Testing capabilities, however, exist within the platform as well.
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
No
14. Provide any other information or notes relevant to the "Integration and Interoperability" section.
—

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?
- AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards.
 - Other (please specify)

2. Can the LMS play content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
3. Provide any other information or notes relevant to the “Standards and Guidelines” section.

—

Hosting

1. Is the LMS available as a *company-hosted* solution?

Yes
2. How many LMS installations are hosted by the *company*?

225
3. Is the LMS available as a *client-hosted* solution?

No
4. How many LMS installations are hosted by the *client*?

Not applicable
5. How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner ✓
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
6. If the company’s LMS hosting is provided by a partner or partners, please list the name (s).

Rackspace, Akamai, Amazon EC2, Advection.
7. Briefly describe the company’s preferred or recommended hosting option.

Company hosted.

8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.

—
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing
 - Yes, when requested for an additional fee ✓
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the “Hosting” section.

Development environment is available for SCORM courses before pushed live to server by Peach. Non-SCORM courses (streaming videos, etc, are produced by Peach using our internal testing servers and are pushed to production servers for client review and QA.)

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?

Yes
2. Can end users specify their preferred language (which may differ from the default site language)?

No
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?

Not applicable
4. Does the LMS support the ability to recommend courses based on end users’ prior activities, profile data, or role in the system?

Yes

- Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?

Yes

- Provide any other information or notes relevant to the “Personalization” section.

—

Interface Configuration

- Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).

Yes. Front-end is all customized and branded to client CSS, graphics, Nav structure, and page layout.

- Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).

Yes. Basic branding provided on administrative view.

- Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.

Yes. Front-end is all customized and branded to client CSS, graphics, Nav structure, and page layout.

- Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.

Yes. —

- Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.

Yes. Can be customized based on event attendance, membership, group membership, or subscription level.

- Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.

Yes. Based on permissions associated with the administrator.

- Provide any other information or notes relevant to the “Interface Configuration” section.

—

Internationalization and Localization

- Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

Yes

- Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

No

- Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?

No

- Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?

No

- Can administrators change the default time zone used for formatting dates and times in the LMS?

No

Freestone private community entrance

rlug online community
powered by Boston Conferencing

Dashboard | FAQs | Support | What is RLUg? | Sign In | Register

Upcoming Webinars

- Retail Link 101™ - FREE
- DSS 101
- Supplier Script Orders
- DSS 102
- PO Tracking
- Forecasting and Seasonal Profiles
- Excel 2003 - VLookup and So Much More
- (CPFR) Replenishment 101

Welcome

Welcome to the Retail Link® User Group Online, the premiere destination for Walmart supplier education. This is a new release of the RLUg Online Community with access live webinars, previously held webinars on-demand, and in-person classroom training, as well as the community blog. Many more RLUg Online Community features to come!

If this is your first time visiting the new site, please create an account to view the RLUg Online Blog and all the supplier created webinars and content.

Create an account now and get FREE access to the Retail Link® 101 webinar on October 6 (US \$79 value)

On-Demand Programs

- Walmart Presents - Business Sustainability - Presented by Wal-Mart VP Andy Ruben
- Unlocking Store Genetics: Maximizing Store Traits - Part 1
- Unlocking Store Genetics: Tactical Strategies in Retail Link™ - Part 2
- Linking Replenishment to Business Fundamentals: A Streetsmart Guide
- A Closer Look at Retail Collaboration

Create New Account

Email Address:

This email address will be used as your unique identifier so you must enter a valid address. Enter the address you commonly use for business purposes.

Account Login

Email Address:

Password:

Remember Me

[I don't know my password >>](#)

Support

Need Help?

The American College of Rheumatology's SessionSelect uses Freestone to deliver hundreds of recordings from its annual scientific meeting to attendees for free, during the conference. Attendees log-in using their badge number and, within a few hours of each completed session, are able to view the recordings online. In 2011, these recordings will be viewable on iPhones, iPads, and Android devices in addition to desktop browsers.

AMERICAN COLLEGE OF RHEUMATOLOGY
EDUCATION • TREATMENT • RESEARCH

MEMBERSHIP | PRACTICE MANAGEMENT | ADVOCACY | PUBLICATIONS | EDUCATION & CAREERS | FOUNDATION

EDUCATION & CAREERS

HOME > EDUCATION > SESSIONSELECT

ACR SessionSelect
Your source for educational sessions, online

- ▶ SessionSelect Home
- ▶ Search
- ▶ Tech Support

Maximize Your Learning Opportunities!

STAY CONNECTED. STAY INFORMED.

SessionSelect is the official conference recording library of the ACR and ARHP that allows you to maximize your educational opportunities 24/7 and share with colleagues. It also offers you the flexibility to connect anytime, from home or office, and view hundreds of recorded educational presentations from past ACR/ARHP live meetings.

- Learn at your pace and at your convenience.
- Receive speaker presentation slides and audio for easy viewing or listening.
- Choose from a variety of media options allowing you to learn anytime and anywhere.

The flexibility to access the most relevant information and research pertaining to rheumatic diseases is what makes SessionSelect a practical educational tool.

Select a category to see the available programs

- Annual Scientific Meetings (5 Programs)
- ARHP Clinical Focus Courses (3 Programs)
- Ethical Issues (1 Program)
- Maintenance of Certification (3 Programs)
- Review Course (6 Programs)
- State-of-the-Art Clinical Symposia (4 Programs)

2010 State-of-the-Art Clinical Symposium

Looking for a program that provides the most up-to-date information in rheumatology? This symposium presents up-to-date information on a broad array of topics in rheumatology. Because these recorded presentations are available through SessionSelect, registered attendees receive complimentary access to the educational content (pre-conference courses and workshops not included). Purchase option available to non-attendees.

[MORE INFO >](#)

Media Playback Options

- Webcasts** allow you to view presentation slides with synchronized audio on demand with online streaming.
- Video CD-ROMs** give you the video

6. In how many countries has the LMS been implemented for clients?

3

7. Please list the countries where the LMS has been implemented for a client.

USA, Canada, UK.

8. In how many languages has the LMS been implemented for clients?

1

9. Please list the languages in which the LMS has been implemented for a client.

—

10. How many language packs are available for the *end-user* view of the LMS?

—

11. Please list the languages for which a language pack is available for the *end-user* view.

—

12. How many language packs are available for the *administrator* view of the LMS?

—

13. Please list the languages for which a language pack is available for the *administrator* view.

—

14. Provide any other information or notes relevant to the “Internationalization and Localization” section.

—

- The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
- Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users ✓
 - The LMS does not support search by end users.
 - Other (please specify)
3. What types of search are available to *administrators* in the LMS?
- Search within a single catalog
 - Search across multiple catalogs
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify)
4. Provide any other information or notes relevant to the “Search and Catalogs” section.
-

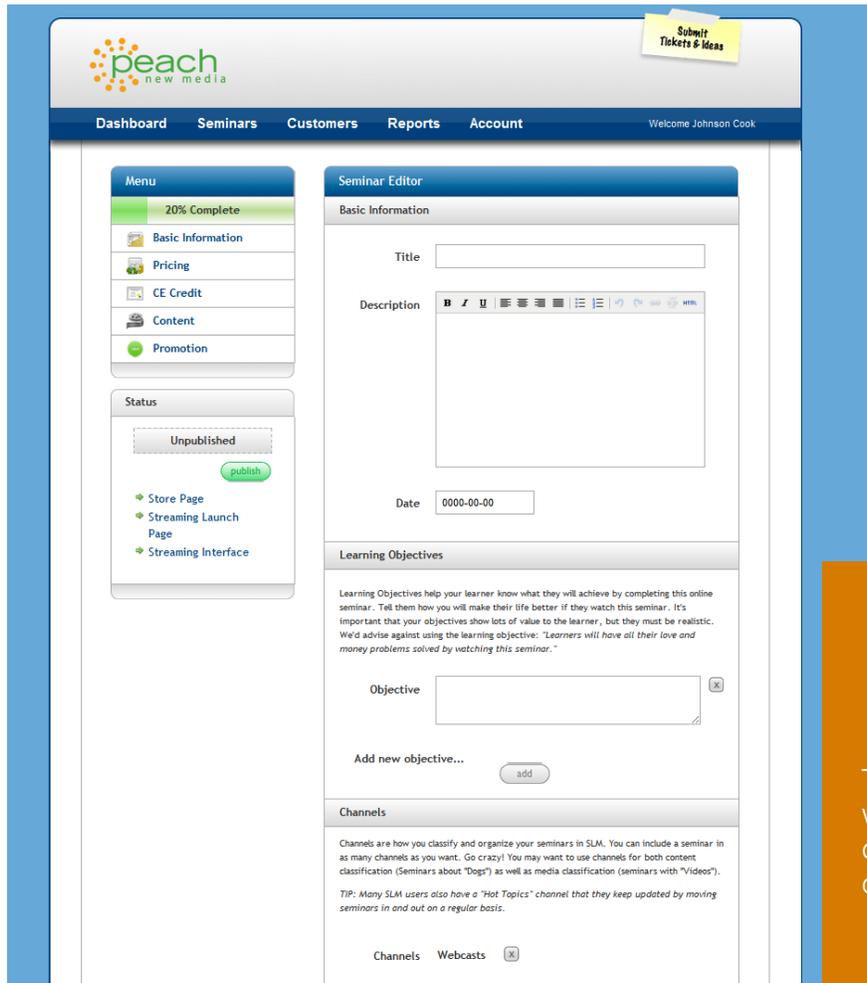
Search and Catalogs

1. How do content catalogs function in the LMS?
- Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
- Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓

- E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education ✓
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
- The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify) ✓
(A) Random pop-ups throughout course (B) User pays additional fee to earn CE credit from course.
3. Does the LMS provide the ability to author learning content?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
For streaming video courses, webinar archives, Peach typically manages production OR the client can use our web-based data entry, course builders. For SCORM based courses, clients can self-author and upload directly to the LMS. Peach QA’s the SCORM courses and pushes
- from development server to production server.*
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
Each course may have video or audio synchronized to slides or other presentation material.
5. Does the LMS support offline authoring of learning content?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
SCORM courses can be authored offline and published when ready.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Check in/check out functionality
Completely custom
 - Ability to review content before it is published
Semi-standard
 - Ability to assign tasks to administrators
Semi-standard
 - Ability to monitor progress on tasks
Semi-standard
 - Ability to add internal comments (viewable only by other administrators) to content
Semi-standard



The first page of the course creation wizard in Freestone. Freestone clients can use the tool to create courses for their learning center.

Multiple types of content (live Webcasts, Webinars, Web workshops) are all displayed on a single learning center dashboard. Each course is expandable on the home page for more information without leaving the page. Categories and channel widgets are fully customizable.



The screenshot shows a webinar interface for the Society of Women Engineers. On the left, a video window titled "Streaming Media from SWE" displays two women. Below the video is an "Announcements" section with a timestamp of "September 23rd, 2009 8:35:46 pm" and text thanking attendees and providing a "click here" link. The main content area on the right features a green background with the title "Little Things Mean A Lot™" and subtitle "From Microinequities to Micro-affirmations". It is dated "September 30th, 2009" and lists the speaker "Brigid Moynahan" from "Next Level, Inc." with a small portrait photo. The Kellogg's logo is in the top right, and the Society of Women Engineers logo is in the bottom right. Navigation buttons "First", "Back", "1 of 19", "Next", and "Last" are at the bottom.

Freestone user-resizable video windows in the Silverlight live streaming video interface

This screenshot shows the same webinar interface as above, but the "Streaming Media from SWE" video window is significantly larger, occupying more of the screen. The text in the main content area is partially obscured by the larger video window. The "Announcements" section and other interface elements remain visible in their original positions.

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 8. Can the LMS generate printer-friendly content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
 9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
 10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
 - Browser-delivered online content ✓
 - Downloadable version ✓
 - CD or DVD ✓
 - HTML ✓
 - SWF ✓
 - PDF ✓
 - Other (please specify) ✓
Live streaming Video or Audio, or via Teleconference Audio.
 12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
 - Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable

16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
Peach New Media offers our own production services for authoring your content. For SCORM courses, we recommend Articulate, but any SCORM tool will work. Any other authoring tool may be used as long as it can export learning content into WMV, FLV, SWF, PDE, DOC, PPT, etc.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
-

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Administrative calendar for courses
Completely custom
 - End user calendar for viewing course options and schedules
Completely custom
 - Waitlisting
Unavailable
 - Personnel management (for scheduling instructors and facilitators)
Completely custom
 - Facility management (for scheduling rooms)
Unavailable
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Unavailable
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Semi-standard
 - Customizable e-mail messages and notifications to administrators
Completely custom

[View Now](#) ACR Special Session- Year in Review

Original Date: Oct-26-08 07:15 AM

Presented By: Brian F. Mandell, MD, PhD, Rosalind Ramsey-Goldman, MD, DrPH, Sherine E Gabriel MD, MSc, Iain B. McInnes, FRCP, PhD, Alan N Baer MD

Resources:

[MP4](#) Vodcast - ACR Special Session- Year in Review

Freestone
vodcast
and
product
delivery

2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.

Yes. The Freestone is sometimes used to collect materials from speakers and deliver the online syllabus to attendees.

3. Provide any other information or notes relevant to the “In-person, Place-based Courses” section.

Freestone can stream any course live from in-person conferences to provide a hybrid course.

Webinars

1. Does the LMS provide integrated Webinar functionality?

- Standard ✓
- Semi-standard
- Completely custom
- Third-party
- Unavailable
- If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).

Completely integrated: single-sign on, pop-ups for attendance verification and quizzes, dial-in and meeting URL information automatically sent in registration confirmation e-mails with Outlook calendar invite attached.

2. Briefly describe the company’s preferred or recommended Webinar software.

Peach uses both Microsoft LiveMeeting and Freestone’s proprietary Web Event platform depending on the client requirements.

3. Provide any other information or notes relevant to the “Webinars” section.

Peach New Media provides full service moderation of webinars, automatic reminders via e-mail and telephone “auto dialers” the day before an event, and all technology management so associations only provide a speaker and a time and we do everything else.

Registration

1. How can end users be registered in the LMS?

- By self-registration ✓
- By registration code or key ✓
- By an administrator registering end users one by one ✓
- By an administrator performing a bulk upload ✓
- As the result of an e-commerce purchase ✓
- By self-registration with administrator approval
- Other (please specify)

2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?

No

3. Does the LMS provide secure authentication for end users with a valid log-in and password?

Yes

4. Does the LMS provide self-serve password recovery help for end users?

Yes

5. Can administrators define new *end-user* roles with distinct rights and access in the site?

Yes

6. Can administrators define new *administrator* roles with distinct rights and access in the site?

No

7. Can the fields for end user profiles be added, edited, and deleted?

Yes

8. Is the content of profile fields updatable by end users if allowed by administrator?

Yes

9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?

No

10. Provide any other information or notes relevant to the “Registration” section.

—

Enrollment

- How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify) ✓
Via integration with AMS or outside registration system.
- Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?
No
- How administrators configure enrollment options?
 - Sitewide
 - At the catalog level
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis ✓
 - Other (please specify)
- Can enrollments occur based on end user-specific criteria?

—

 - The end user’s role in the system
 - The end user’s score on an assessment
 - The end user’s completion of prerequisites for a particular course
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)
- Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling

separately in each individual course)?

Yes

- Provide any other information or notes relevant to the “Enrollment” section.
Freestone includes a robust subscription system. Allows for companies to purchase a subscription to an associations content (or to a specific channel of content) and then manage the company users without having to contact the association.

Managing Continuing Education and Certification

- Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
Yes
- Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user’s state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
Yes
- To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement)

Freestone sample
CE credit summary

The 'Nuts and Bolts' for Paralegals Supporting a Criminal Law Practitioner (Part 4 of 6)

Overview Speakers Credit

National Association of Legal Assistants

Total General Hours: 1.00

This seminar meets the requirements of the Certifying Board for Legal Assistants of the National Association of Legal Assistants, Inc., for 1.0 hours, including 0.0 ethics, of continuing legal assistant education credit required to maintain the CLA (Certified Legal Assistant) credential.

New Mexico State Bar

Total General Hours: 1.00

Approved by the Paralegal Division of the State Bar of New Mexico for 1.0 general and 0.0 ethics (for a total of 1.0 hours CLE).

North Carolina State Bar Board of Paralegal Certification

Including Ethics: 1.00

This program has been approved by the North Carolina State Bar Board of Paralegal Certification for continuing paralegal education credit in the amount of 1.0 hours, of which 0.0 hour will also apply in the area of professional responsibility. This course is not sponsored by the Board of Paralegal Certification

Florida Registered Paralegal Program

Total General Hours: 1.00

This course will qualify for 1.0 hours of self-study continuing education for paralegals, including 0.0 hour of self-study ethics credit, toward the eligibility requirements of the Florida Registered Paralegal Program.

Ohio State Bar Association Paralegal Certification Program

Total General Hours: 1.00

This course will qualify for 1.0 hours of self-study continuing education for paralegals, including 0.0 hour of ethics, toward the eligibility requirements of the

Products

Streaming
IPE Price: \$75.00
[Add To Basket](#)

Quick Launch

Already Purchased this Course?
[Launch Now](#)

- The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
 5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
 7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?

Yes

8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
 - Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines)
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No
 - Other (please specify) ✓

Through integration with another tracking application.
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?

Yes
12. Can end users view and print their own transcripts?

Yes

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- Disability, Labor & Employment (3 Seminars)
- Diversity (1 Seminar)
- Elder Law (1 Seminar)
- Ethics (5 Seminars)
- Family Law (4 Seminars)
- Finance (1 Seminar)
- Litigation (7 Seminars)
- Real Estate (2 Seminars)
- Skills (4 Seminars)
- Tax (1 Seminar)
- Trusts & Estates (4 Seminars)

Current Seminars

Seminars	Monroe County Bar Center for Education Approved CLE Credit				
	Total CLE Hours	Ethics Credits	Skills Credits	Practice Management Credits	Professional Practice Credits
A Discussion & Analysis of the Historic Decision: The New Haven Firefighters Case	2.00		2.00		
An Update in Ethics and the CPLR		2.00			
Anatomy For Lawyers	2.00			2.00	
Bankruptcy Exemptions - Changes Effective January 211					2.00
Boilerplate Contract Provisions: Corporate V. Litigation Perspective				2.00	

Monroe County Bar Association learning center shows content channels for on-demand programs and upcoming live programs. At the bottom of the page, there is a quick summary of all courses available, listed in a tabular format by CLE Credit Hours and Types for quick reference when users are searching for credit hours.

13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.

No

14. How many clients use the LMS to manage continuing education or certification?

30

15. What types of continuing education or certification do clients use the LMS to manage?

- Continuing education units (CE or CEU) ✓
- Continuing medical education (CME) ✓
- Continuing legal education (CLE) ✓
- Continuing professional education (CPE) ✓
- Certificate of successful completion ✓
- Credit towards completing or maintaining a certification, licensure, or other credential ✓
- Credit towards a degree at a college or university
- No clients are using the LMS to manage continuing education or certification.
- Other (please specify)

16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.

—

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?

Yes

2. How does the LMS allow assessments to be used?

- Ability to offer an assessment as a standalone item (i.e., not associated with an online course)
- Ability to associate an assessment with an online course ✓
- Ability to associate multiple assessments with a single online course
- Other (please specify)

3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?

Yes

4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?

- Yes, after an end user submits her answer to each question
- Yes, after an end user completes the entire assessment ✓
- Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
- No
- Other (please specify)

5. How does the LMS provide for automatic feedback for assessments?

- Per question ✓
- Based on whether the end user answered the questions correctly ✓
- Per distracter, or answer option ✓
- Based on which distracter the end user selected ✓
- Per assessment
- Based on the end user's overall performance on the assessment
- The LMS does not provide for automatic feedback for assessments.
- Other (please specify)

6. Can the LMS automatically display a summary screen to show the end user her assessment score?

Yes

7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
No
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
No
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment.
 - Yes, end users can be required to retake only the questions they previously answered incorrectly. ✓
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes)
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013)
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment)
 - The LMS does not provide for time limits for assessments. ✓
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers)
 - True/false or yes/no questions ✓
 - Text field
 - Fill-in-the-blank questions (where users type answers in fields in the questions)
 - Matching questions
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order)
 - Hotspot questions (where users must select the correct area of a graphic)
 - Drag-and-drop questions
 - Other (please specify)

18. Provide any other information or notes relevant to the “Assessments” section.

—

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course)
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
No
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
No
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013)

- For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓
- The LMS does not provide for time limits for evaluations.
- Other (please specify)

10. Which types of questions does the LMS make available for use in evaluations?

- Multiple-choice questions (single answer) ✓
- Multiple-select questions (multiple answers)
- Matrix of choices (single answer per row) ✓
- Matrix of choices (multiple answers per row)
- Rating scale (e.g., Likert scales)
- Text box (single field) ✓
- Text boxes (multiple fields) ✓
- Number fields ✓
- Date fields
- Time fields
- Demographic information
- Other (please specify)

11. Provide any other information or notes relevant to the “Evaluations” section.

—

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
No

4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses)
 - Other (please specify) ✓
Requested Reports are assigned to Administrator Users by Account Director.
5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
—
7. List and briefly describe the standard, pre-configured reports available in the LMS.
Reports are custom built upon request.
8. Briefly describe the process for creating ad-hoc reports in the LMS.
E-mail or Call your Account Director.
9. How many custom reports does the company typically develop for a client implementation of the LMS?
4
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
Sales reports, CE Credit Reports, Evaluation Reports, Activity Reports

11. Provide any other information or notes relevant to the "Reporting" section.
—

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
 - Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts).
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish).
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports.
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
—
3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
—

4. Provide any other information or notes relevant to the “Support for Multiple Sites” section.
-

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Standard
 - End user-to-administrator e-mail
Semi-standard
 - Administrator-to-end user e-mail
Semi-standard
 - Broadcast messaging to all end users
Semi-standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Semi-standard
 - Instant messaging (one-on-one)
Semi-standard
 - Live chats (for multiple end users)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Forums and eGroups
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Standard
 - Discussion boards
Standard
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard
 - Live voice-over-IP
Standard
 - Virtual whiteboard
Semi-standard
 - Virtual presentations (e.g., PowerPoint-driven)
Standard
 - Screencasting
Standard
 - Application-sharing
Standard
 - Ability to associate a wiki with a course
Standard
 - Single-point Web camera capability
Standard
 - Multiple-point Web camera capability
Completely custom
 - Networking (e.g., ability for end users to connect with one another)
Standard
 - Ability for each registered end user to have a blog
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

NARI Knowledge Community dashboard includes social media widgets (Twitter, LinkedIn, and Facebook) that allow for interaction (like, follow, share, etc.) directly on the learning center page. Additionally, the NARI blog (hosted externally) is pulled in and viewable as a dashboard widget. Podcasts are viewable as NARI Radio. On-demand Webinars are featured at the top of the page. Any RSS or XML content widgets can be added to Freestone dashboards.

Freestone is viewable on iPads and iPhones. Video and audio content can be streamed either live or on-demand to mobile devices as of Q2 2011. iPad table viewing includes credit verification, attendance tracking, synchronized slides, and pop-ups. Full-interface functionality is also available on iPad viewers.

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Standard
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
Payment by points, pre-purchased credits (firm wide), or subscription access (firm wide or individual wide). Also allows depositing of funds in advance to be used on courses later.
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles sales tax, including variations based on the state or region
Standard
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Standard
 - Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Standard
 - Automatically maintains order status that can be checked by end user
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
 - Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
 - 2Checkout
 - Authorize.Net

- BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify)
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own

system) and how integration between the LMS and e-commerce system typically works.

-
7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
Yes
8. Provide any other information or notes relevant to the "E-commerce" section.
—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Standard
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Standard
 - E-mail support for administrators
Standard

The screenshot shows the Peach Knowledge Community (PKC) dashboard. At the top left is the Peach logo with the tagline 'knowledge community'. To the right, there's a Twitter follow button for @peachnewmedia and a Freestone logo with links to Dashboard, Support, and My Account. The main content area is divided into several sections: 'Live Webinars & Webcasts' with a list of upcoming events; 'On-Demand Knowledge Programs' with a list of available courses; 'Featured Live Program' highlighting the 'association new media summit 2009'; 'Peach on YouTube' with a video thumbnail; and 'Our Blog' with a recent article titled 'Public or Private – What Type of Association Community Do You Favor?'. A central banner features the 'cae CERTIFIED' logo and text about CAE Continuing Education Credits. A sidebar on the right contains the text 'Peach Knowledge Community (PKC) dashboard'.

- Self-serve, searchable knowledge base for end users
Standard
 - Self-serve, searchable knowledge base for administrators
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Self-serve online training (e.g., tutorials) for end users
Completely custom
 - Self-serve online training (e.g., tutorials) for administrators
Completely custom
 - Scheduled online training (e.g., Webinars) for end users
Completely custom
 - Scheduled online training (e.g., Webinars) for administrators
Completely custom
 - Scheduled in-person training at client offices for end users
Completely custom
 - Scheduled in-person training at client offices for administrators
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
 3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
24/7 Telephone Support, 365 days/year.
 4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Regular business hours.
 5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Mon-Fri 7am-7pm eastern time.
 6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
All Account Directors have mobile e-mail and will respond to urgent requests at any time.
 7. Briefly describe the company's typical ongoing communication with its LMS clients.
—
 8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
Marketing and Promotions for new content.
 9. Provide any other information or notes relevant to the "Support and Training" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
50%
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
Varies.
4. Briefly describe the process for used for planning and implementing custom programming work.

Determine requirements, approve fixed cost, develop, QC, release.

5. Please specify the location (by time zone) of personnel involved in custom programming.
 - *-6 and -5 UTC*
6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.

-6 and -5 UTC
8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.

—

Starfield

Starfield Talent Management Solutions



Industry focus: electrical, education, energy, and health care

LMS Version: 9.4

Value proposition: *Starfield provides tools to keep members engaged and informed. Members view associations as a resource—with Starfield, the member/association relationship grows even stronger. Associations can provide a unique member experience, offer compliance tracking, and create robust reports and analytics easily.*

Top clients (associations): *None provided by company, as it prefers to provide targeted references.*

Top clients (non-associations): *None provided by company, as it prefers to provide targeted references.*

URL for more information about the LMS: • http://starfieldtms.com/solutions_learning_sub.php

Three-year pricing: *None provided by company, as it varies from client to client.*

Hosting: *By company only*

Starfield Talent Management Solutions

315 E. Bay Street, Suite 301,
Jacksonville FL 32202

904.701.7300

sales@starfieldtms.com

<http://www.starfieldtms.com>



Our Take on Starfield Some Highlights

Starfield Talent Management Solutions is new to associations but has been in business since 1994. The company's suite of products—Starfield Learning Management, Starfield Performance Management, Starfield 360° Assessment, Starfield Compensation Management, and Starfield Analytics—makes clear its emphasis on talent management and performance, only one part of which is learning management.

- Starfield has the experience and expertise to assist clients in developing a competency model and then linking courses and even standard job role profiles to specific competencies—and developing industry competencies is an area we think could make sense for many associations.
- Starfield's LMS is among an increasing number of systems in the report that give end users the ability to input education credits earned from sources outside the LMS.
- The system also provide tools for helping users monitor renewal dates and requirements for certifications and licenses—a capability that jibes with the overall competency and performance focus of the system.
- Starfield is focused on ensuring that learners make maximum use of the system. One approach to increasing engagement is the use of “to do” lists to present learners with all their current action items in the system.
- Currently end users cannot purchase courses in the system, but the company plans to roll out e-commerce functionality in the first quarter of 2013. Another potential issue is that users currently have to be logged in to see a catalog—although there are workarounds, like providing a PDF version of catalog content.
- The availability of the other products in Starfield's portfolio—all of which can be used on an integrated basis with the LMS—may be particularly attractive to trade associations or other organizations that serve corporate, as opposed to individual, customers.

In general, Starfield's strong focus on helping learners develop and maintain competencies may make it a nice fit for trade associations in industries that are—or could be—competency-driven.



General Company Information

1. When was the company founded?
1994
2. How many employees does the company currently have?
20
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
Starfield provides software solutions that help organizations track learning and development activities as well as manage the performance of their employees. The Starfield solutions that are used by associations most often are: Starfield Learning Management, Starfield Performance Management and Starfield's proprietary assessment engine and reporting tool.
5. Provide the company's contact information.
*315 E. Bay Street, Suite 301
Jacksonville FL 32202
USA
sales@starfieldtms.com
(904) 701-7300*
6. Provide the URL for the company's Web site.
http://www.starfieldtms.com
7. Provide any other information or notes relevant to the "General Company Information" section.
Starfield was founded in 1994 as Integrated Performance Systems (IPS), one of the earliest providers of end to end talent management software solutions. In 2006, IPS was acquired by Beeline, a wholly owned subsidiary of Adecco. In 2012, Starfield spun off of Beeline, to focus on providing innovative talent management solutions.
3. When was the first version of the LMS initially released?
1/1/1999
4. Briefly describe the upgrade cycles for the LMS.
Starfield typically has 4 software releases per year. We utilize an Agile software release method to allow for rapid feedback and modifications to enhancements. Generally, any functionality which is configurable is released "off." Clients are presented the new functionality with release notes, and are able to turn it "on" if desired. In addition to release notes, Starfield Account Managers review new product enhancements with clients during the client/Starfield regularly scheduled meetings.
5. How many associations use this LMS?
1
6. How many organizations in total use this LMS, including associations?
25
7. How many end users are registered in the single largest client implementation hosted by the company?
50,310
8. How many end users are registered in the single largest client implementation hosted by the client?
Not applicable
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
177,250
10. Briefly describe the value proposition for this LMS as it applies to associations.
Starfield provides tools to keep members engaged and informed. Members view associations as a resource -- with Starfield, the member/association relationship grows even stronger. Associations can:
 - *Provide a Unique Member Experience*
 - ▶ *Customize an interface that mirrors a members' branding & nomenclature*
 - ▶ *Segment information by member*

General LMS Information

1. What is the name of the LMS product?
Starfield
2. Provide the product version described in this survey response.
9.4

- ▶ *Target training to specific members*
 - ▶ *Utilize industry specific and/or standard competencies*
 - *Offer Compliance Tracking*
 - ▶ *Monitor professional certifications and license renewals*
 - ▶ *Track & report Continuing Education Units (CEUs)*
 - ▶ *Allocate accessibility to courses using activity licensing*
 - ▶ *Include industry specific and/or standard training offerings*
 - *Create Robust Reports & Analytics Easily*
 - ▶ *Interact with visual dashboards for easy access to reports*
 - ▶ *Track information at the organization and/or member level*
 - ▶ *Allow members to access reporting tool*
 - ▶ *Utilize analytics across membership*
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
- 499 or fewer registered end users
13%
 - 500 to 2,499 registered end users
21%
 - 2,500 to 4,999 registered end users
30%
 - 5,000 to 9,999 registered end users
18%
 - 10,000 to 24,999 registered end users
9%
 - 25,000 or more registered end users
9%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
- Not applicable*
- 1,000 or less
 - 1,001 to 5,000
 - 5,001 to 10,000
 - 10,001 to 25,000
 - 25,001 to 50,000
 - 50,001 to 100,000
 - More than 100,000
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
- Less than 100
 - 101 to 200
 - 201 to 500
 - 501 to 1,000
 - 1,001 to 5,000
100%
 - More than 5,000
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
Starfield solutions have been successfully implemented in organizations both large and small, across various industries. However, Starfield has a large number of clients in the electrical, education, energy, and health care industries.
15. Please list the company's top *association* clients.
Starfield is happy to accommodate client reference requests. Starfield prefers to provide clients with references that use the product modules the client is interested in, as well as those that are similar in size and/or industry. Contact sales@starfieldtms.com to learn more about association clients using Starfield.
16. Please list the company's other (non-association) top clients.
Starfield is happy to accommodate client reference requests. Starfield prefers to provide clients with references that use the product modules the client is interested in, as well as those that are similar in size and/or industry. Contact sales@starfieldtms.com to learn more about clients using Starfield LMS.
17. Provide a URL for more information about the LMS.
http://starfieldtms.com/solutions_learning_sub.php

18. Provide any other information or notes relevant to the “General LMS Information” section.

—

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company’s usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

90

Typical

60

Simple

30

2. Briefly describe the implementation process.

- *Initiate: An Implementation Kick Off Meeting will be conducted by an assigned Starfield Implementation Manager.*
- *Analysis: Following the Kick Off, the Starfield Implementation Manager will develop the Design (Scope) Document as well as the proposed project work schedule that will be used to guide all implementation activities.*
- *Configuration: Starfield will set up and configure the client site in accordance with preferences outlined during the analysis.*
- *Data Integration: Starfield will work with client to set up the initial data load.*
- *Reporting: Starfield will work with client to define your requirements, build and test reports.*

- *Training: Traditionally, Starfield provides up to 2 two hour sessions of Administrator Training.*
- *Testing: Starfield will work with client to build your specific test case scripts to ensure the system meets the requirements we agreed to.*
- *Deployment: Once testing is completed and has been signed-off by client, Starfield will migrate to a live production site over a period of two days, which will be agreed to by both parties.*

3. Briefly describe the *company* personnel (by role) involved in the LMS implementation. *Our implementations are done with an in-house team of Starfield employees dedicated to the client. Our team includes:*

- *Implementation Manager*
- *Account Manager*
- *Business Development Manager*
- *Client Services Manager*
- *Executive Sponsor*

4. Please specify the location (by time zone) of company personnel involved in implementation.

-6 and -5 UTC

5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.

The expectation is that the client will provide a Project Manager or Subject Matter Expert (SME) who will coordinate the implementation of the Starfield LMS. This person will work hand in hand with the Starfield Implementation Manager to ensure the successful adoption of the Starfield LMS within the client’s organization. An Executive Level Sponsor is also typically involved.

6. Provide any other information or notes relevant to the “LMS Implementation” section.

Due to the flexibility and configurability of the Starfield LMS, implementation time frames can vary, depending on client needs. Starfield works closely with clients to establish feasible implementation timelines/go live dates.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 -
 - 500
 - 2,500
 - 5,000
 - 10,000
 - 25,000
 - Unlimited
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 -
 - 500
 - 2,500
 - 5,000
 - 10,000
 - 25,000
 - Unlimited
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

 - 500
 - 2,500
 - 5,000
 - 10,000
 - 25,000
 - Unlimited
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

 - 500
 - 2,500
 - 5,000
 - 10,000
 - 25,000
 - Unlimited
5. Briefly describe the pricing model for the LMS.

Starfield's pricing model is based upon the total number of active users as well as the modules purchased. Starfield offers both multi-module and multi-year discounts. The Starfield LMS is typically \$20-\$30 per user annually with a one time implementation fee and discounts available for larger organizations or those with limited complexity.
6. Briefly describe the payment schedule.

Starfield offers flexibility in the payment schedule available to clients. Some clients prefer to be

billed annually or monthly, while others prefer quarterly. The Starfield Sales Representative will work with the client to determine the appropriate payment schedule that works best for the client and Starfield.

7. Briefly describe pricing for additional services.

Starfield offers its Client Success Model to all Starfield clients, at no additional cost. This level of support includes dedicated client administrators with the ability to work directly with a Starfield Account Manager, familiar with the client's processes, nomenclature, and system configuration. If additional support and/or training is needed, Starfield will quote this on an as needed basis. Starfield makes all attempts to ensure that features and functionality that are added to the application will be beneficial to all clients. This keeps costs down for clients and Starfield. In the rare instance that a client requires custom programming and/or services, Starfield would quote this for the client.

8. Provide any other information or notes relevant to the "Pricing" section.

Starfield's pricing model offers flexibility to clients. Starfield Sales Representatives work with clients to provide pricing that best meets their organization's needs.

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?

Not applicable

2. Briefly describe the technical framework and code structure of the LMS.

Starfield is built on a .Net framework and is hosted on the Cloud. Starfield offers a single tenant application.

3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.

Starfield offers standard and client specific data feeds. This ensures that data from outside sources, such as Association Management

Systems, can be imported into the Starfield system and data from Starfield can be exported to other client systems. During the implementation process, historical data feeds are established to import client information.

4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
Starfield was built to handle high usage volume. Starfield leverages the Cloud's elasticity to provide a scalable and fault tolerant environment.
5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
There are no limits set regarding the Starfield infrastructure. 1 Gb of storage is provided at no cost to the client. Additional storage can be purchased if necessary for the hosting of online training.
6. Provide any other information or notes relevant to the "Technology" section.
—

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
To utilize Starfield, end users will need access to a web browser. Starfield currently supports Internet Explorer (7.0 and 8.0), Firefox, Safari, and Chrome. If a client offers eLearning/Online training, Adobe Flash is often required.
2. What are the technical requirements for an *administrator* to access the LMS?
To utilize Starfield, administrators will need access to a web browser. Starfield currently supports Internet Explorer (7.0 and 8.0), Firefox, Safari, and Chrome.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes

5. Provide any other information or notes relevant to the “System Requirements” section.

—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?

90%

2. Briefly describe the typical types of integration for the LMS.

Starfield typically receives a data feed from a client’s HRIS system, which updates Starfield user accounts and creates new users in the Starfield system. Clients often host 3rd party eLearning on the Starfield system and have a data feed that provides Starfield with information about users’ activity with the 3rd party training courses. Starfield can integrate with Association Management Systems to update member information in the Starfield system.

3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.

Starfield offers a variety of integration communication methods to fit customer needs including: sFTP, FTP, FTPS, and SOAP.

4. Briefly describe the process used for planning and implementing integration between the LMS and another system.

During the implementation process, Starfield will work closely with the client to define necessary integrations. The Starfield Implementation Manager will work closely with the client Project Manager to define the required information to implement with other systems. Starfield has a standard file layout template that we use to define each data load for clients. We work with clients to map this against their current data.

5. With which of the following Webinar systems has the LMS been integrated for a client implementation?

- Adobe Connect
- Elluminate
- Genesys

- GoToMeeting
- Microsoft Live Meeting
- ReadyTalk
- WebEx
- Completely custom (non-commercial) Webinar system
- The LMS has never been integrated with a Webinar system.
- Other (please specify) ✓

In the Starfield LMS, clients are able to schedule ‘Web Conference’ sessions, inputting the session link for the Webinar being held with any Webinar system provider. The learner can launch the webinar from within the Starfield LMS.

6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?

- Aptify (Aptify)
- Association Anywhere (ACGI)
- ClearVantage (Euclid)
- CRM for Members (ProTech)
- iMIS (Advanced Systems International)
- IRMembership (IRM Systems)
- Members360 (Affiniscape)
- netFORUM (Avecetra)
- Office Manager (internet4associations)
- Personify (TMA Resources)
- TIMSS (TMA Resources)
- Wild Apricot (Wild Apricot)
- Completely custom (non-commercial) AMS
- The LMS has never been integrated with an AMS.
- Other (please specify) ✓

Starfield integrates with several HRIS systems via regular data feeds. Likewise, Starfield could integrate with an AMS. Starfield offers the ability to conduct regular uploads via FTP. Starfield has a standard file layout template that we use to map against clients’ current data. Once loaded, administrators have full access to modify general member information (members can also be added manually by the administrator).

7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
- ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS. ✓
 - Other (please specify)
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
- No*
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
- No. While Starfield has not done formal testing for interoperability with any e-commerce systems; Starfield's roadmap is highly influenced by the needs of our clients. The priority to add this capability will be driven by market need.*
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
- No*
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
- Yes. Starfield's LMS has a built-in assessment engine which can be used to build pre-tests, post-tests, manager follow-up evaluations, and course evaluations.*
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
- Yes. Starfield's built-in assessment engine can be used to deliver both assessments and surveys within the Starfield LMS.*
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
- Yes. Starfield works in partnership with both course and competency providers to offer content within the Starfield LMS. Starfield clients utilize course providers such as MindLeaders and Skillsoft. Clients also use competency models developed internally, by Starfield, or by third-party providers.*
14. Provide any other information or notes relevant to the "Integration and Interoperability" section.
- While Starfield has not done formal testing for interoperability with authoring tools, LCMS's, CMS's, AMS's, or Webinar Systems; Starfield's roadmap is highly influenced by the needs of our clients. Starfield intends to integrate with these types of systems moving forward; however, their priority is determined based upon client need.*

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards. ✓
 - Other (please specify)
2. Can the LMS play content that conforms to guidelines or standards?

- AICC ✓
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
3. Provide any other information or notes relevant to the “Standards and Guidelines” section.
-

Hosting

1. Is the LMS available as a *company-hosted* solution?
Yes
2. How many LMS installations are hosted by the *company*?
25
3. Is the LMS available as a *client-hosted* solution?
No
4. How many LMS installations are hosted by the *client*?
Not applicable
5. How does the company provide LMS hosting?
 - On servers managed directly by the company
 - On servers managed by a partner ✓
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify) ✓
Amazon manages the servers; however Starfield manages the Virtual Instances.
6. If the company’s LMS hosting is provided by a partner or partners, please list the name (s).
The Starfield LMS is hosted within Amazon Web Services’ Virtual Private Cloud.
7. Briefly describe the company’s preferred or recommended hosting option.

Starfield’s LMS is solely available as a company-hosted solution. The solution is hosted on Amazon’s Cloud servers.

8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
Starfield has established maintenance windows to perform system upgrades and maintenance. Clients are notified via email regarding scheduled down time, if outside of the maintenance window.
 9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing ✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations
 10. Provide any other information or notes relevant to the “Hosting” section.
-

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users’ prior activities, profile data, or role in the system?
Yes

5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?

Yes

6. Provide any other information or notes relevant to the “Personalization” section.
Starfield is a highly configurable, personalized application. End users can be presented with custom information based upon their membership type, location, or other client configurable criteria, allowing the right information to get to the right users at the right time. Real time, graphical reports are available for display, providing users with updated training statistics and information.

dashboards specific to groups of users. Administrators also have control over the branding and look and feel for end users, controlling the verbiage and nomenclature that’s used throughout the Starfield system. Administrators are able to create a unique experience for subsets of users utilizing Starfield’s built-in user group functionality. Administrators can additionally control the color scheme used throughout the Starfield system. Using built in administrative tools, administrators are able to easily modify the branding, dashboard configuration, verbiage, permissions, settings and overall end-user experience.

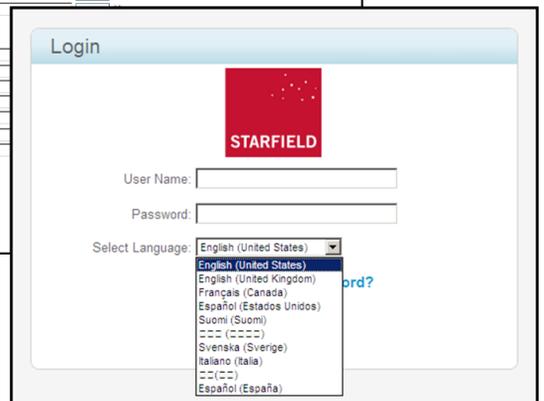
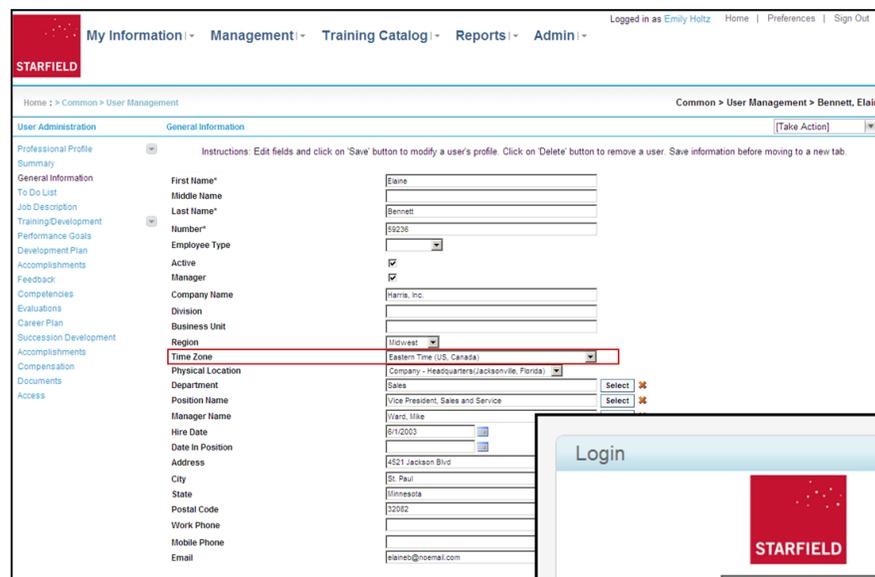
2. Are the branding and look and feel for the administrator view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the administrator view are customized (e.g., handled entirely via cascading style sheets).

Yes. During the implementation process, the Starfield Implementation Manager will work closely with the client to define the available features and functionality available to

Interface Configuration

1. Are the branding and look and feel for the end-user view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the end-user view are customized (e.g., handled entirely via cascading style sheets).

Yes. Administrators have the ability to configure



administrators. Flexibility is available for administrators to turn features on/off and modify the branding and look and feel of the Starfield application, including the verbiage and nomenclature used throughout. Using built in administrative tools, administrators are able to easily modify the branding, dashboard configuration, verbiage, permissions, settings and overall administrator experience.

3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.

Yes. The navigation options available to end-users in the Starfield LMS are configurable by the client administrator. Navigation options can be turned off via Starfield settings and permissions, ensuring that the appropriate menu options are available to end users. In addition to offering top level menu navigation to areas of the system, Starfield offers the ability for navigation quick links to be available on users' dashboards.

4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.

Yes. Based upon an administrator's role and visibility within the Starfield system, different navigation options may or may not be available. During the implementation process, the Starfield Implementation Manager will work with the client administrator to determine the navigation options that are appropriate to display for subsets of administrators. Like the end-user view, navigation options can be turned on or off via settings and permissions and quick links are available to be displayed on administrators' dashboards.

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.

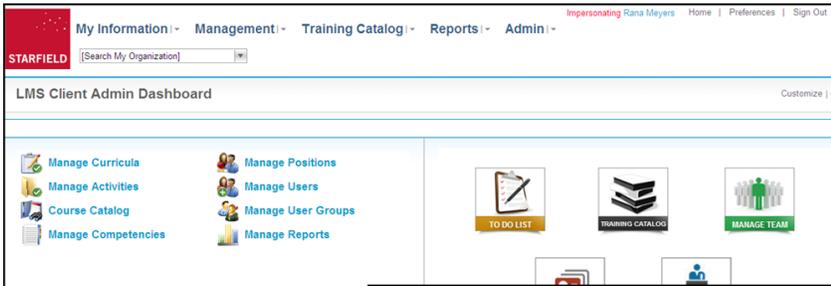
Yes. The site content within Starfield is highly configurable. Client administrators have the

flexibility to determine the content that's displayed to users. Client administrators have full control over the content that displays to users via administrative interface tools.

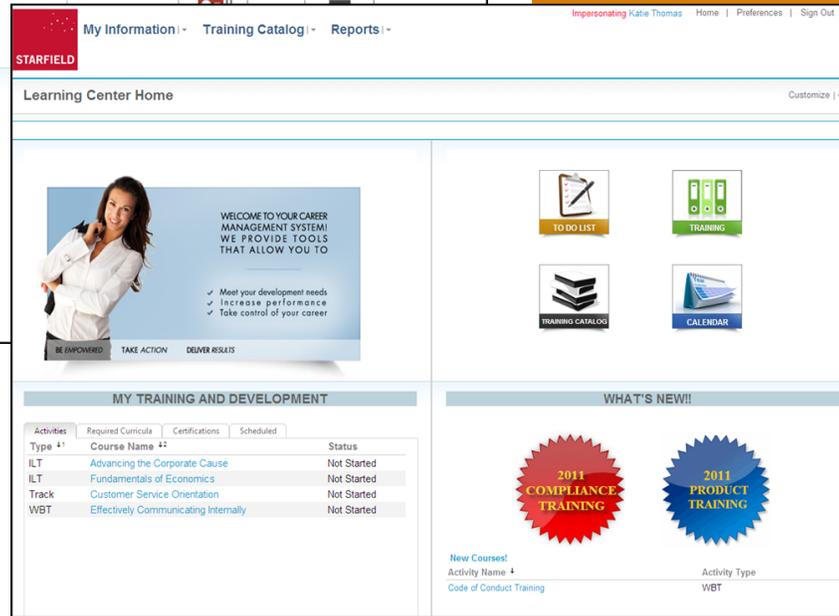
6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.
Yes. Client administrators have the ability to configure the administrator interface and update content that's available.
7. Provide any other information or notes relevant to the "Interface Configuration" section.
—

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term "student" with the term "learner" throughout the site)?
Yes
2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term "student" with the term "learner" throughout the site)?
Yes
3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
No
5. Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes



Administrators in Starfield can configure dashboards specific to groups of users. An example administrator dashboard (top) and end user dashboard (bottom) are shown here.



6. In how many countries has the LMS been implemented for clients?

11

7. Please list the countries where the LMS has been implemented for a client.

United States, Spain, Mexico, France, Switzerland, China, Portugal, Japan, Italy, Sweden, Finland, and Korea.

8. In how many languages has the LMS been implemented for clients?

11

9. Please list the languages in which the LMS has been implemented for a client.

English, Spanish, French, Dutch, Chinese, Portuguese, Japanese, Italian, Swedish, Finnish, and Korean.

10. How many language packs are available for the end-user view of the LMS?

11

11. Please list the languages for which a language pack is available for the end-user view.

English, Spanish, French, Dutch, Chinese,

Portuguese, Japanese, Italian, Swedish, Finnish, and Korean.

12. How many language packs are available for the administrator view of the LMS?

1

13. Please list the languages for which a language pack is available for the administrator view.

English

14. Provide any other information or notes relevant to the “Internationalization and Localization” section.

If Starfield does not offer a language pack that a client is looking for out of the box, Starfield will work with the client to ensure that the Starfield application gets translated into the necessary language(s).

Search and Catalogs

1. How do content catalogs function in the LMS?

- Administrators can create a single catalog. ✓

- Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in).
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for other end users ✓
 - The LMS does not support search by end users.
 - Other (please specify)
 3. What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify)
 4. Provide any other information or notes relevant to the “Search and Catalogs” section.

Starfield provides multiple search options when viewing the activity catalog. End users can search utilizing multiple criteria such as keyword, activity name, activity number, activity category, activity type, competency, and session dates. Visibility is available in the catalog,

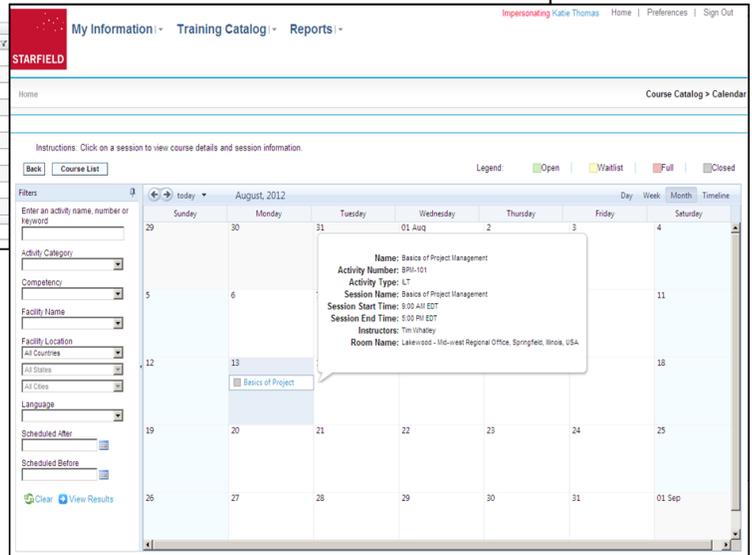
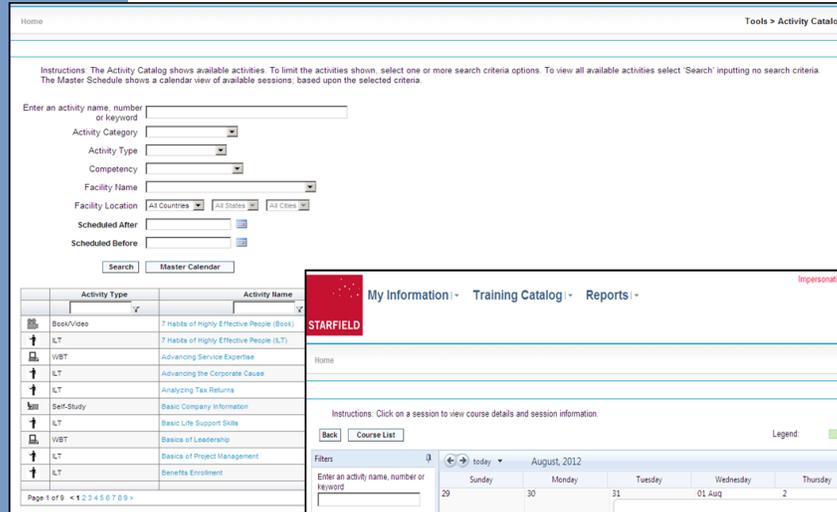
allowing administrators to restrict the viewing of subsets of activities to users meeting set criteria. Administrators and users can search for other users utilizing the built in Professional Profile Search.

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games
 - CD-ROM or DVD-based education ✓
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course.
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify) ✓

The end user marks their status in the course completed.

An end-user view of an activity catalog and a master calendar in Starfield



3. Does the LMS provide the ability to author learning content?

- Standard
- Semi-standard
- Completely custom
- Third-party
- Unavailable ✓
- If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).

4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?

- Standard
- Semi-standard
- Completely custom
- Third-party
- Unavailable ✓
- If yes, briefly describe how rich media is typically integrated.

5. Does the LMS support offline authoring of learning content?

- Standard
- Semi-standard
- Completely custom
- Third-party
- Unavailable ✓

- If yes, briefly describe how the LMS supports offline authoring.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Check in/ check out functionality
Unavailable
- Ability to review content before it is published
Unavailable
- Ability to assign tasks to administrators
Unavailable
- Ability to monitor progress on tasks
Unavailable
- Ability to add internal comments (viewable only by other administrators) to content
Unavailable
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

7. Does the LMS provide for versioning of learning objects and maintain archival versions?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
8. Can the LMS generate printer-friendly content?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the printer-friendly option functions.
9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the digital rights management functions.
10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Not applicable*
- Browser-delivered online content
 - Downloadable version
 - CD or DVD
 - HTML
 - SWF
- PDF
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓

17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
18. Does the LMS provide the ability to make a document library available to users?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
Starfield does not offer a stand alone course authoring tool. Starfield recommends the usage of course authoring tools such as ellegro, Articulate, and Captivate.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
—

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Standard
 - Personnel management (for scheduling instructors and facilitators)
Standard

- Facility management (for scheduling rooms)
Standard
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Standard
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Unavailable
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Unavailable
2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
Yes. Starfield offers the ability for administrators to schedule multiple sessions of an in-person/web conference training course. Within Starfield, administrators can select the session dates, as well as schedule the room, instructor, and associated resources.
3. Provide any other information or notes relevant to the "In-person, Place-based Courses" section.
Starfield provides the ability for end users to search and register for Classroom based and Web Conference based courses utilizing our built in catalog and calendar features. Administrators have the flexibility to determine the groups of users able to view/register for courses within the catalog. When registering for training, administrators have the ability to trigger a manager and/or administrator approval process. Administrators have the ability to manage details about the scheduled sessions including minimum/maximum attendee limits, waitlist, instructors, rooms, and resources.

Webinars

- Does the LMS provide integrated Webinar functionality?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
- Briefly describe the company's preferred or recommended Webinar software.

Starfield clients use a variety of different Web Conference providers such as WebEx and GoToMeeting.
- Provide any other information or notes relevant to the "Webinars" section.

—

- By an administrator registering end users one by one ✓
- By an administrator performing a bulk upload ✓
- As the result of an e-commerce purchase
- By self-registration with administrator approval
- Other (please specify) ✓

By a manager registering end users one by one.

- Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?

Yes
- Does the LMS provide secure authentication for end users with a valid log-in and password?

Yes
- Does the LMS provide self-serve password recovery help for end users?

Yes
- Can administrators define new *end-user* roles with distinct rights and access in the site?

Yes

Registration

- How can end users be registered in the LMS?
 - By self-registration
 - By registration code or key ✓

In Starfield, end users can search and register for place-based courses using the catalog and calendar features. Administrators have the ability to manage details about the scheduled sessions, including minimum and maximum attendee limits, waitlisting, instructors, rooms, and resources.

The image displays three screenshots of the Starfield LMS interface:

- Top Left:** A course detail page for "Business Analysis and Change Training" (Activity Number: BAC101). It includes sections for "General Information", "Course Description", "Course Objectives", "Prerequisites", and "Available Sessions". The "Available Sessions" table lists dates and times, with "Register" buttons highlighted in red.
- Top Right:** A calendar view for September 2012, showing the course sessions plotted on a grid. A tooltip for a session provides details: Name: Business Analysis and Change Training, Activity Number: BAC101, Session Name: Business Analysis and Change Training, Session Start Time: 9:00 AM EDT, Session End Time: 10:00 AM EDT, Instructors: Rena Hevrens, George Catena, Room Name: N/A.
- Bottom:** A "Session Information" page for "Business Analysis and Change Training". It shows a table of sessions with columns for Activity, Session Start Time, and Session End Time. Below the table, there are fields for "Session Name", "Attendance Limit", "Training Manager Email", "Cost", "Time Zone", and "Display Session Details".

6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
7. Can the fields for end user profiles be added, edited, and deleted?
Yes
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
No
10. Provide any other information or notes relevant to the “Registration” section.
Administrators can provide the ability for users to self-register in the LMS or they can add them via the administrator interface. In addition, users

can be imported via a data feed. Administrators can determine the fields available to be displayed on the end user profile. “Forgot Password” functionality is available, allowing users to request their username/password be sent to them via email.

Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase
 - By self-enrollment with administrator approval ✓
 - Other (please specify)

The top image shows an administrator view of scheduling a Webinar, the middle image shows an end user view of launching a Webinar, and the bottom image shows an end-user view of the Webinar's details on the master calendar.

Top Screenshot (Admin View): Shows the 'Session Information Details' page for 'Building Your Company Brand'. It includes a form with fields for Session Name, Conference Number (1.877.684.5071), Passcode (6288114), URL (http://yourcompany.webex.com), Attendance Limit (15), Training Manager Email, Cost (0.00), Time Zone (Eastern Time (US, Canada)), Display Session Online (checked), and Enable AutoWaitList (unchecked). Buttons for 'Add Date', 'Add Instructor', 'Add Room', and 'Add Resource' are visible.

Middle Screenshot (End User View): Shows the 'Calendar' view for 'Building Your Company Brand'. It includes a 'Launch Course' button and a 'General Information' table:

Activity Name	Activity Number	Activity Category	Hours Per Day	Activity CEUs	Language
Building Your Company Brand	MKT200	Customer Service Skills	0.00	0.00	English

Bottom Screenshot (End User View): Shows a calendar grid with a popup window for 'Building Your' on the 8th. The popup contains the following details:

- Name: Building Your Company Brand
- Activity Number: MKT200
- Activity Type: Web Conference
- Session Name: Building Your Company Brand
- Session Start Time: 8:00 AM EDT
- Session End Time: 5:00 PM EDT
- Instructors: Jean Blundell
- Room Name: N/A

2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?

Yes

3. How administrators configure enrollment options?

- Sitewide
- At the catalog level
- By course group
- On a course-by-course basis ✓
- On an end user-by-end user basis
- Other (please specify)

4. Can enrollments occur based on end user-specific criteria?

- The end user's role in the system ✓
- The end user's score on an assessment
- The end user's completion of prerequisites for a particular course ✓
- The LMS does not support enrollment based on end user-specific criteria.
- Other (please specify)

5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?

Yes

6. Provide any other information or notes relevant to the "Enrollment" section.

Registration within Starfield can occur in multiple ways. Administrators and/or managers can register end users for training activities, while end users can additionally self-register. In the self-registration process, functionality is available for approval to be required by either the administrator and/or the users' manager. Visibility is available within the system, allowing administrators to determine the courses that different users have the ability to search and register for. Users can be restricted from registering for training activities, based upon whether or not prerequisite courses have been completed. Starfield offers unique functionality allowing users to register for a 'track' which is a roll-up group of training activities. Users can register for the track and in turn, have access to all of the training activities that make up the

track. Within the track, administrators have the ability to determine if users need to complete courses in a set order and/or if courses can be completed in any order.

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?

Yes

2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?

No

3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?

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My Information | Training Catalog | Reports |
Impersonating Sue Landers Home | Preferences | Sign Out

Home : > Course Catalog > Calendar

Instructions: Registration instructions for selected courses.

General Information

Activity Name	Activity Number	Activity Category	Length (Days)	Hours Per Day	Activity CEUs	CEU Category	Language
Business Analysis and Change Training	BAC101	Leadership Skills					

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Home : > LMS > Activity Management

LMS > Activity Management > Business Analysis and Change Training

Activity Management Details General [Take Action]

Instructions: Edit fields and 'Save' to modify an item. Save information before moving to a new section. To create a new item, complete the information details and 'Save'. Once saving, additional sections will appear.

Activity Name*	Business Analysis and Change Training	Activity Number	BAC101
Activity Type*	LT	Display in Activity Catalog	<input checked="" type="checkbox"/>
Activity Category	Leadership Skills		
Author			
Language	English		
Min attendees / class	0	Max attendees / class	5
Max waitlisted attendees	0	Number of Days for Auto Cancellation	0
Manager Approval Required	<input type="checkbox"/>	Allow Auto Enrolling	<input checked="" type="checkbox"/>
Recertification Months	0	Length (Days)	2.00
Activity Cost	0.00		
Completion Certificate	Certificate of Achievement		
Activity Evaluation	Course Evaluation		

View Feedback/Comments

Prerequisites

Activity Name: 7 Habits of Highly Effective People (LT)
Coaching Performance

Available Sessions

Date(s)	Register	Location	Course Comments
9/3/2012 12:00 PM - 5:00 PM (Eastern Time (US, Canada))	Register now		Details
9/4/2012 8:00 AM - 12:00 PM (Eastern Time (US, Canada))	Register now		Details
9/24/2012 8:00 AM - 5:00 PM (Eastern Time (US, Canada))	Register now		Details
9/25/2012 8:00 AM - 5:00 PM (Eastern Time (US, Canada))	Register now		Details

Express Interest

You should express interest in this course if the scheduled times or locations are not suitable to you, or if scheduled dates are not available.

Express Interest

Back

An end-user view of enrolling in an activity

An administrator view of setting enrollment options for an activity in Starfield

An administrator view of session details

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My Information | Management | Training Catalog | Reports | Admin |
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Home : > LMS > Session Information > Changing the Culture

Session Information Details Attendees [Take Action]

General Attendees To Do List Expenses Time Visibility

Instructions: Listed below are the attendees for this session. To add attendees to the session, select 'Add'. To mark users complete, select the checkbox beside the employees' names and 'Mark Complete'. To reschedule a user into another session, select 'Reschedule'. This will pull up additional sessions for the same activity.

Attendance Limit: 5 Min / Max Attendees: 0 / 15 Total Enrolled: 5 Total Waitlisted: 1 Total Completed: 0

	Name	Email	Manager	Department	Date Requested	Request Confirmed Date	Confirmation Sent Date	Last Email Sent Date	Completion Date
<input type="checkbox"/>	Agular, Carmen	carmen.agular@starfield.com	Bennett, Elaine	Corporate	12/19/2011 8:59 PM	12/19/2011 8:59 PM	12/19/2011 8:59 PM	12/19/2011 8:59 PM	
<input type="checkbox"/>	Allison, Aimee	aimee.allison@starfield.com		Corporate	12/19/2011 8:59 PM	12/19/2011 8:59 PM	12/19/2011 8:59 PM	12/19/2011 8:59 PM	
<input type="checkbox"/>	Cabana, George	george.cabana@starfield.com	Reynolds, Ed	Corporate	12/19/2011 8:59 PM	12/19/2011 8:59 PM	12/19/2011 8:59 PM	12/19/2011 8:59 PM	
<input type="checkbox"/>	Holder, Lily								
<input checked="" type="checkbox"/>	Kennedy, Summer								
<input type="checkbox"/>	Reynolds, Ed								

Add Mark Complete

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My Information | Training Catalog | Reports |
Impersonating Kate Thomas Home | Preferences | Sign Out

Home : To Do List

Instructor Summary > Business Analysis and Change Training

Location

Date	Facility Name	Room Name
Aug 30 2012 8:00AM - 5:00PM Eastern Time (US, Canada)	Company - Headquarters Jacksonville, Florida	Seminar
Aug 31 2012 8:00AM - 5:00PM Eastern Time (US, Canada)	Company - Headquarters Jacksonville, Florida	Seminar

Directions:

Company - Headquarters Jacksonville, Florida

Take Rt 59 to 31 (turn left)
Take 31 to South Street (turn right)
Take South Street to Victoria Avenue (turn left)
Building is on the right hand side of the street.

Select	Name	Status
<input type="checkbox"/>	Adams, David	Enrolled
<input type="checkbox"/>	Agular, Carmen	Enrolled
<input type="checkbox"/>	Baldevarona, Lotus Mae	Enrolled
<input type="checkbox"/>	Collins, Cameron	Enrolled
<input type="checkbox"/>	Conde, Philip	Enrolled

Print Roster Print Certificate

An instructor view of session information

- Automatically upon end user completion of the content ✓
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
- By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
- By the user claiming the credit ✓
 - By the user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
- Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline) ✓
 - No
 - Other (please specify) ✓
Yes, via built-in Reporting.
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing

An end user's view of her training history (top) and • CEU reporting (bottom) in Starfield

The screenshot displays the Starfield LMS interface. At the top, there are navigation links: "My Information", "Training Catalog", and "Reports". Below this is a "My Talent Profile" section with a "Quick Reports" dropdown. The main area is titled "Internal Training" and contains a table of training activities. Below this is a "CEU Report" section with a detailed table of CEU earnings.

Type	Activity Name	Status	Activity CEUs	Activity Date	Completion Date	Pre-Test	Post-Test	Course Evaluation
ILT	Analyzing Tax Returns	Pending Manager Approval	3.00	3/7/2011				
ILT	7 Habits of Highly Effective People (LT)	Completed	3.00	3/24/2011	3/24/2011			Take Evaluation
ILT	How to Build Customer Loyalty	Completed	3.00	4/20/2010	4/22/2010			
ILT	Payroll - Understanding the General Ledger	Completed	3.00	2/23/2010	2/23/2010			Take Evaluation
ILT	Developing Employees	Completed	3.00	6/19/2009	6/19/2009			Take Evaluation
ILT	Showing Care & Compassion	Completed	3.00	6/12/2009	6/12/2009			Take Evaluation
ILT	Business Analysis and Change Training	Cancelled	2.00	2/26/2010				

Full Name	Employee Number	Manager Name	Department	Position Name	Activity Name	Activity Type	Activity CEUs	Actual Date Started	Year Completed	Pre-Test	Post-Test
Thomas, Katie	2564	Whatley, Tim	Operations	Quality Analyst	7 Habits of Highly Effective People (LT)	ILT	3.00	3/24/2011	2011		
Thomas, Katie	2564	Whatley, Tim	Operations	Quality Analyst	Code of Conduct Training	WBT	2.00	2/16/2010	2010		
Thomas, Katie	2564	Whatley, Tim	Operations	Quality Analyst	Competency Management Training	Self-Study	2.00	7/4/2009	2009		
Thomas, Katie	2564	Whatley, Tim	Operations	Quality Analyst	Developing Employees	ILT	3.00	6/19/2009	2009		
Thomas, Katie	2564	Whatley, Tim	Operations	Quality Analyst	How to Build Customer Loyalty	ILT	3.00	4/20/2010	2010		
Thomas, Katie	2564	Whatley, Tim	Operations	Quality Analyst	Payroll - Understanding the General Ledger	ILT	3.00	2/23/2010	2010		
Thomas, Katie	2564	Whatley, Tim	Operations	Quality Analyst	Showing Care & Compassion	ILT	3.00	6/12/2009	2009		
							19.00				

education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality. *Yes. Starfield provides a built-in Professional Profile area, allowing end users to track their education, experience, memberships, certifications, and honors and awards information. The Professional Profile area can be used by other end users or the administrator to locate a member based upon various criteria.*

14. How many clients use the LMS to manage continuing education or certification?

16

15. What types of continuing education or certification do clients use the LMS to manage?

- Continuing education units (CE or CEU) ✓
- Continuing medical education (CME)
- Continuing legal education (CLE)
- Continuing professional education (CPE)

- Certificate of successful completion ✓
- Credit towards completing or maintaining a certification, licensure, or other credential ✓
- Credit towards a degree at a college or university ✓
- No clients are using the LMS to manage continuing education or certification.
- Other (please specify)

16. Provide any other information or notes relevant to the "Managing Continuing Education and Certification" section.

Starfield offers a number of ways to track Certifications, External Training, and Continuing Education. At the activity level, administrators are able to associate the number of CEU's that are obtained by completing the course. Administrators also have the ability to determine at the activity level whether a course requires re-certification. If it does, end users are notified via email and their To Do List when the re-certification time period is approaching. End users can additionally track professional

certifications. As certifications approach expiration, configurable emails are available to be sent to users and/or their manager. Users can also track training taken through an outside institution, such as a local university.

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?
Yes
4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
 - Yes, after an end user submits her answer to each question
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
 - Per question ✓
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option ✓
6. Based on which distracter the end user selected ✓
- Per assessment ✓
- Based on the end user's overall performance on the assessment ✓
- The LMS does not provide for automatic feedback for assessments.
- Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
No
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
Yes
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
 - Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes

13. Does the LMS allow administrators to create question banks (for reuse purposes)?

Yes

14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?

No

15. Does the LMS provide for automatic randomization of assessments?

- By randomizing which questions are included in the assessment ✓
- By randomizing the order in which questions are presented ✓
- By randomizing the order in which distracters, or answer options, are presented ✓
- The LMS does not provide for automatic randomization of assessments.
- Other (please specify)

16. Does the LMS provide for time limits for assessments?

- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
- For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
- For end users to complete an entire assessment by a specified date (e.g., December 31, 2013)
- For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment)
- The LMS does not provide for time limits for assessments.
- Other (please specify)

17. Which types of questions does the LMS make available for use in assessments?

- Multiple-choice questions (single answer) ✓
- Multiple-select questions (multiple answers) ✓
- True/false or yes/no questions ✓

- Text field ✓
- Fill-in-the-blank questions (where users type answers in fields in the questions)
- Matching questions ✓
- Sequence questions (e.g., users are asked to put the steps of a process in the correct order)
- Hotspot questions (where users must select the correct area of a graphic)
- Drag-and-drop questions
- Other (please specify) ✓
Drop Down, Check Box List.

18. Provide any other information or notes relevant to the “Assessments” section.

Starfield’s built-in assessment engine can be used to build pre-tests, post-tests, manager follow-up evaluations, and course evaluations in the LMS. Features available for administrators include: Set passing score, Set time limit, Allow re-answer of questions, Allow bookmarks, Re-take assessment options (Re-take assessment on demand, Re-take limit, and Re-take period), Various question types, Question pooling, Question randomization, Configurable question display (All on one page, One question per page, etc.), Display recommended activities, Display passing score, and Multiple feedback options (Incorrect questions, Incorrect questions with feedback, All questions with feedback, Feedback only).

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?

Yes

2. How does the LMS allow evaluations to be used?

- Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
- Ability to associate an evaluation with an online course ✓
- Ability to associate multiple evaluations with a single online course ✓
- Other (please specify)

3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
Yes
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
No
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
No
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013)
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated)
 - The LMS does not provide for time limits for evaluations. ✓
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row) ✓
 - Matrix of choices (multiple answers per row) ✓
- Rating scale (e.g., Likert scales) ✓
- Text box (single field) ✓
- Text boxes (multiple fields) ✓
- Number fields ✓
- Date fields ✓
- Time fields
- Demographic information ✓
- Other (please specify)
11. Provide any other information or notes relevant to the “Evaluations” section.
Administrators have the ability to link both Course Evaluations and Manager Follow-Up Evaluations to activities. Administrators can additionally create anonymous climate surveys to gather organizational information.

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports ✓
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports ✓
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users’ profiles or store additional metadata on courses) ✓
 - Other (please specify)

STARFIELD

My Information | Management | Training Catalog | Reports | Admin |

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Home > Common > Assessment Management

Common > Assessment Management

Assessment Management Build

General Build Instructions: Edit fields and 'Save' to modify an item. Save information before moving to a new section. To create a new item, complete the information. Once saving, additional sections will appear.

Results Page Schedule

Randomize Questions? Do Not Randomize Questions

Display:

Questions Per Page:

Outline:

Save Add Questions Add New Group Manage Question Category Preview

1 - Competency Management - Customer Focus

Display Pool Group Question Do Not Randomize Questions

Display Description Label

Display Linked Behaviors

New Question Remove Question Group

An administrator view (top) and an end-user view (bottom) of a Starfield assessment

STARFIELD

My Information | Training Catalog | Reports |

Home

My Talent Profile Internal Training

Summary: To Do List General Information Professional Profile Job Description Training/Development Curriculum Summary Internal Training External Training Certifications Documents

Benefits Enrollment

1. What is a competency?
 Skill
 Knowledge
 Behavior
 All of the Above

2. What question types are used in the calculation of competency ratings?
 Multiple-Choice
 Drop Down
 Multiple-Choice & Scaled
 Scaled
 Scaled & Dual-Scaled

3. If a position is associated to a competency, does the competency in turn appear within the position management area of the system?

4. What does the 'core competency' checkbox do?
 Nothing
 Assigns the competency and all associated activities related to the competency, to all users.
 Associates the competency to the 'Core Competencies' page, for all users.
 Adds the competency to all users' Starfield Professional Profile

Post-Test Course Evaluation

Take Evaluation

Take Post Test

Take Evaluation

STARFIELD

Leadership Seminar

1. The techniques I learned in this program will help me be a more effective leader.

2. The tools introduced in this program will be helpful in my job.

3. The program's length was appropriate for the content covered.

4. The materials used in the program were clear and easy to understand.

5. The videos helped me understand key learning points.

6. The program provided an appropriate balance of practical and theoretical information.

7. I would recommend the program to others.

8. Describe one important thing you learned in this program.

9. What areas (topics, concepts, skills, etc.) would you like to have covered in more depth?

10. What did you like best about the program?

11. What did you like least about the program?

12. What suggestions do you have to improve this program?

13. Other comments:

An end-user view of a Starfield evaluation (top) and evaluation reporting (below)

STARFIELD

Evaluation Cross Tab Summary - Instructor-Led

Curriculum	Activity	Session	Date	Total Respondents	Total Participants	1-1. The following statements relate to training material and activities: (The printed materials provided helped me learn the information and were easy to use.)	1-2. The following statements relate to training material and activities: (The Powerpoint was easy to follow.)	1-3. The following statements relate to training material and activities: (The demonstration was helpful.)	2-1. The following statements relate to the instructor: (The instructor effectively presented the material.)	2-2. The following statements relate to the instructor: (The instructor allowed participants to ask questions.)	2-3. The following statements relate to the instructor: (The instructor demonstrated knowledge of content.)	3-1. The following statements relate to your personal experience in the training: (I feel after attending this presentation I have a better understanding of the concepts taught.)	3-2. The following statements relate to your personal experience in the training: (I feel that presentation met its stated objectives.)	4-1. The following statements relate to your overall evaluation of the training activity: (The presentation was helpful in learning new skills.)
Business Women Skills	Payroll - Understanding the General Ledger	Payroll - Understanding the General Ledger	2/23/2010	3	7	4.00	4.00	4.00	5.00	5.00	5.00	4.00	4.00	4.67
Intellect Skills	How To Win Friends and Influence People	How To Win Friends and Influence People	7/8/2009	2	6	4.50	4.50	4.50	5.00	5.00	5.00	4.50	4.50	5.00
Intellect Skills	How To Win Friends and Influence People	How To Win Friends and Influence People	3/3/2010	2	6	3.50	3.50	3.50	4.50	4.50	4.50	4.50	4.50	4.50
Intellect Skills	Showing Care & Compassion	Showing Care & Compassion	6/25/2009	3	4	4.33	4.33	4.33	5.00	5.00	5.00	4.33	4.33	4.67
Intellect Skills	Showing Care & Compassion	Showing Care & Compassion	9/30/2009	1	2	4.00	4.00	4.00	5.00	5.00	5.00	4.00	4.00	4.00
Leadership Skills	Changing the Culture	Changing the Culture	11/23/2009	1	1	4.00	4.00	4.00	5.00	5.00	5.00	3.00	3.00	3.00
Leadership Skills	Communication & Change	Communication & Change	12/7/2009	2	5	4.00	4.00	4.00	3.50	3.50	3.50	4.00	4.00	4.00
Operations Skills	Network Configuration	Network Configuration	3/9/2010	1	1	5.00	5.00	5.00	5.00	5.00	5.00	4.00	4.00	5.00

5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
21
7. List and briefly describe the standard, pre-configured reports available in the LMS.
 - *Activity Detail: Displays detailed activity information based on specified criteria.*
 - *Activity Group Detail: Displays the activities associated to an activity group and what user groups are tied to those activity groups.*
 - *Activity License Detail: Displays the activities associated to an activity license along with detailed license information.*
 - *Competency Detail: Displays competencies and their associated activities.*
 - *Course Proposal: Displays course proposal details for a selected course proposal.*
 - *Course Roster: Displays attendee and session information for scheduled sessions.*
 - *Session Status: Displays details regarding scheduled sessions.*
 - *Curriculum/Activity Detail: Displays curricula as well as their associated activities and curriculum groups.*
 - *Course Evaluation - Basic: Displays basic results of course evaluations, including the total count of responses.*
 - *Course Evaluation - Detail: Displays detailed results of course evaluations.*
 - *Post Test: Displays the results of post-tests.*
 - *Pre Test: Displays the results of pre-tests.*
 - *Certificate of Completion: Generates a certificate of completion for an activity.*
 - *Certification Information: Displays detailed user certification information..*
- *Completed Training: Displays completed training activity information.*
- *CEU Report (Employee): Displays the number of CEUs that a user has obtained for a specified time period.*
- *CEU Report (Administrator): Displays the number of CEUs that users have obtained.*
- *CEU Report (Manager): Displays the number of CEUs that the direct reports and down line reports of a manager have completed. NOTE: Only those direct reports and down line reports with Completed CEUs will appear on this report.*
- *External Training: Displays information regarding employees who have taken external training and the details of the training.*
- *Internal Training: Displays information specific to internal training for users.*
- *Recertification: Displays all activities that are due for recertification.*
8. Briefly describe the process for creating ad-hoc reports in the LMS.
The Starfield LMS includes a built-in ad-hoc reporting tool. Administrators can easily create new reports with templates and/or by using standard reports as a baseline. Options are available to configure the fields and display of the information, including the 'type' of report. Administrators can publish the report and share it with their end users. Flexibility is available to determine who within the organization has the ability to view, create, and edit reports.
9. How many custom reports does the company typically develop for a client implementation of the LMS?
3
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
Clients have the ability to create any report with the built-in Starfield ad-hoc reporting tool; however, during the implementation process, the Starfield Implementation Manager will work closely with the client to help create reports that are not a part of the standard Starfield library.

Oftentimes, clients are looking for an adaptation of a current Starfield report with minor tweaking (different fields available, report output, etc).

- Provide any other information or notes relevant to the "Reporting" section.

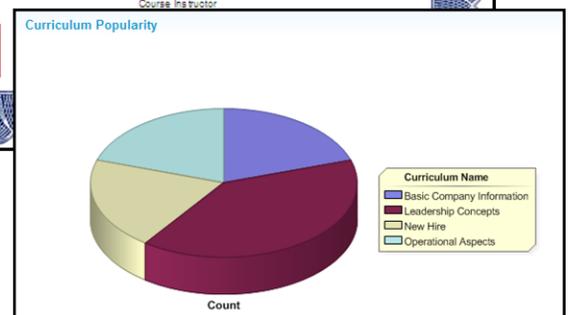
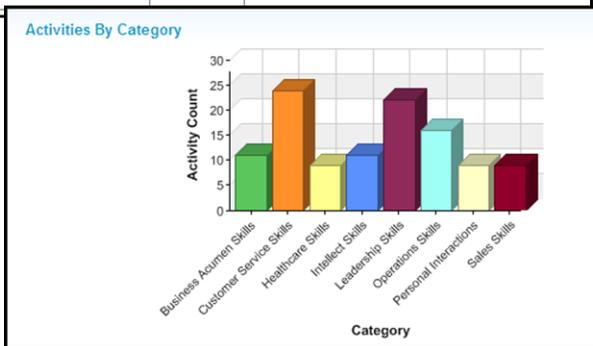
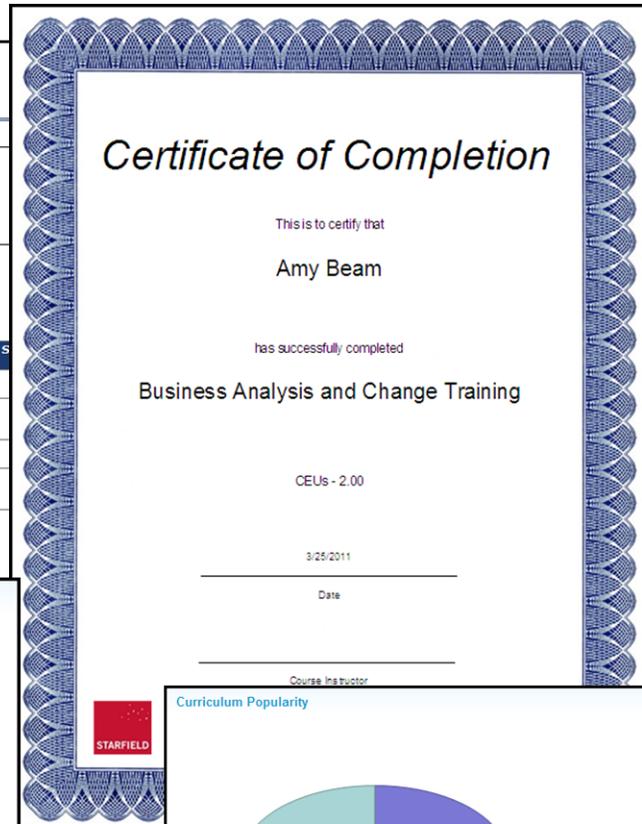
Virtually any report can be created utilizing the built-in Starfield ad-hoc reporting tool.

Administrators can create chart, graph, and list based reports with the ability to drill into the data behind the reports with ease. Administrators have control over who can create, update, and view reports. Administrators can share reports with specific groups of users. Starfield's dashboard capability allows administrators to target specific reports to subsets of users, by placing graphical reports on users' home page.

Support for Multiple Sites

- How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site).
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not).

Course Roster						
STARFIELD						
Session Name: 7 Habits of Highly Effective People (ILT)						
Session Start Time:		8:00 AM EDT				
Session End Time:		5:00 PM EDT				
Facility Name: Company - Headquarters						
Room Name:		Seminole				
Facility Address:		1818 Victoria Ave				
Facility City, State and Zip Code:		Jacksonville, Florida 34893				
Instructor:		George Catana				
Full Name	Current Status	Email	Manager Name	Department	Position Name	Student S
Jokinen, Kristina	Completed	aableton@noemail.com	Lansing, Kristine	Sales	Regional Sales Manager	
MacPherson, Dick	Completed	dick.macpherson@noemail.com	Rapote, Emmanuel	Corporate	Director, Performance Management	
Millar, Rich	Completed	rmillar@noemail.com	Bennett, Elaine	Sales	Regional Sales Director	
Smith, John	Completed	john.smith@noemail.com	Kingston, Cosmo	Sales	Manager, Customer Service	
Instructor Signature		Date				



Example Starfield reports

- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts).
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
15
 3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
3
 4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.

Within Starfield, organizations are able to create a unique user experience, through the use of user groups. User groups within Starfield may have a different logo, dashboard, and functionality available to its users. Administrators are able to determine which users have access to specific courses and/or reports, based upon their user group relationship. At the user level, a preferred language can be selected, to ensure that the Starfield LMS is delivered to the learner in the language of their choice. Most Starfield clients offer a unique dashboard to subsets of their user population to target information to specific groups of users.

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Unavailable
 - End user-to-administrator e-mail
Unavailable
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Unavailable
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Unavailable
 - Live chats (for multiple end users)
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Unavailable
 - Ability for end users to create and store notes or comments on learning content for their own use
Unavailable
 - Discussion boards
Unavailable
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Unavailable
 - Live voice-over-IP
Unavailable

- Virtual whiteboard
Unavailable
 - Virtual presentations (e.g., PowerPoint-driven)
Unavailable
 - Screencasting
Unavailable
 - Application-sharing
Unavailable
 - Ability to associate a wiki with a course
Unavailable
 - Single-point Web camera capability
Unavailable
 - Multiple-point Web camera capability
Unavailable
 - Networking (e.g., ability for end users to connect with one another)
Unavailable
 - Ability for each registered end user to have a blog
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
Starfield has plans to provide comprehensive collaboration and communication capabilities in a future release.

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Unavailable
 - Handles transactions for online courses
Unavailable
 - Handles transactions for other online items (e.g., PDF study guides)
Unavailable
 - Handles transactions for physical items (e.g., books or CDs)
Unavailable
 - Automatically handles payment by credit card (no manual intervention needed)
Unavailable
 - Handles payment by check (manual intervention needed)
Unavailable
 - Handles payment by invoice (manual intervention needed)
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles sales tax, including variations based on the state or region
Unavailable
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Unavailable
 - Multiple shipping options can be configured for physical goods
Unavailable
 - Customizable e-mail message to users making the purchase
Unavailable
 - Automatic e-mail message on purchase to administrators
Unavailable

- Customizable e-mail message to administrators
Unavailable
 - Automatically maintains order status that can be checked by end user
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Unavailable
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Unavailable
 - Handles discounts (e.g., by accepting discount codes)
Unavailable
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
Not applicable
- 2Checkout
 - Authorize.Net
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow
 - PayPal Website Payments
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify)
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Not applicable
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
—
7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
—
8. Provide any other information or notes relevant to the "E-commerce" section.
While Starfield does not currently offer E-commerce through its LMS, our roadmap is highly influenced by the needs of our clients. The priority to add this capability will be driven by market need.

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Semi-standard
 - Live telephone support for administrators
Standard

- E-mail support for end users
Semi-standard
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Standard
 - Self-serve, searchable knowledge base for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Self-serve online training (e.g., tutorials) for end users
Completely custom
 - Self-serve online training (e.g., tutorials) for administrators
Completely custom
 - Scheduled online training (e.g., Webinars) for end users
Completely custom
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Completely custom
 - Scheduled in-person training at client offices for administrators
Semi-standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Completely custom
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Starfield support is typically provided to administrators at the client organization. If end user telephone/email support is needed, Starfield would work with the client to determine the support schedule.
4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
Monday through Friday, 8 am to 5 pm Eastern, excluding holidays. An escalation path is available, if administrators need to reach a Starfield team member outside of our standard support hours.
5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Starfield support is typically provided to administrators at the client organization. If end user telephone/email support is needed, Starfield would work with the client to determine the support schedule.
6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Monday through Friday, 8 am to 5 pm Eastern, excluding holidays. An escalation path is available, if administrators need to reach a Starfield team member outside of our standard support hours.
7. Briefly describe the company's typical ongoing communication with its LMS clients.
Starfield's Client Success Model ensures that our resources are dedicated to ongoing communication with our clients. The Starfield Account Manager is very familiar with the client's business, processes, terminology and configuration. The Account Manager holds regular Account Review conference calls with

clients once the system is implemented. These can be scheduled on a weekly or monthly basis, as determined by the client. The Starfield Account Manager is available for the administrator to call or email to discuss system configuration or any questions or concerns. The Starfield team becomes an extension of the client's team, dedicated to providing the highest level of service and support. A defined escalation path is in place, ensuring 24x7 responsiveness.

8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.

—

9. Provide any other information or notes relevant to the "Support and Training" section.

Typically, Starfield provides two tailored sessions of administrator training. Additional training is provided as needed. Our clients have found that the most successful training we have is easy access to our dedicated Account Managers who are there to answer your questions and provide on-demand training as it's needed, at no extra charge. You have a dedicated Client Support Team with clear escalation paths to be responsive to your needs 24x7.

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?

0%

3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
 -
4. Briefly describe the process for used for planning and implementing custom programming work.
 -
5. Please specify the location (by time zone) of personnel involved in custom programming.
 - *-6 and -5 UTC*
6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel
 - Yes, through a partner ✓
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.
 - *-6 and -5 UTC*
8. Provide any other information or notes relevant to the "Custom Programming and Content Development" section.

Starfield makes all efforts to limit custom programming. When new features and functionality are requested, Starfield will review the enhancement and determine whether the new enhancement is something that will benefit the broader base of Starfield clients. If so, Starfield will slate the enhancement item into one of the quarterly release cycles. If not, Starfield will work with the client to better understand the requested functionality to determine if it's a feature or piece of functionality that may potentially be added in the future.

Thinking Cap LMS

Thinking Cap

Thinking Cap

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Toronto ON M5A 1J2
Canada

416.977.4675

sales@thinkingcap.com

<http://www.thinkingcap.com>



Industry focus: health care

LMS Version: 5.x

Value proposition: *Because the domain structure allows for each group in an association to have their own area complete with their own gateway and branding it is attractive to associations.*

Top clients (associations): *Association of College and University Housing Officers - International • Association of Regional Center Agencies • Textiles Human Resources Council • Ontario Non-Profit Housing Association • National Roofing Contractors Association • Construction Sector Council*

Top clients (non-associations): *Tyco Electronics • Terumo Medical • Taco Beuno • Teranet • Welcome to Parenting • LSU • PCA Skin • OTranspo*

URL for more information about the LMS:
<http://www.thinkingcap.com/lms/lms.htm>

Three-year pricing: \$57,500 to \$270,000

Hosting: *By company or client*





Our Take on Thinking Cap LMS Some Highlights

The design of Thinking Cap’s LMS impresses us as thoughtful. The system’s features exude usability (for example, there’s one place to manage all automatic notifications from the system—although the defaults can be overwritten at the course level), and the company clearly did some hard thinking and problem-solving to arrive at its architecture—its way of handling hierarchies and subsites is particularly elegant.

- Perhaps one reason for the smart approach is Thinking Camp. Twice a year, the company invites customers in for two-day sessions where they provide input on where the product needs to go.
- Challenge questions during courses and assessments are an example of the kind of features that can come from client feedback. Challenges allow organizations to make sure the learner is the learner (e.g., by asking “What color are your eyes?”) and to make sure the learner hasn’t logged in and left while the clock ticks toward completion.
- Because the company has thought deeply about many issues, it also has certain opinions and biases—for example, although it offers an authoring tool, Thinking Cap Create, it is adamant about not integrating authoring with its LMS product because the company believes authoring needs to happen separate from the LMS to ensure interoperability.
- Similarly, the company resisted adding assessment functionality to the LMS because it felt tests should be developed to standards and be portable. Thinking Cap LMS does now offer assessment authoring—but the system creates exportable XML-based SCORM packages where each question is a reusable SCO, which is not an approach we’ve seen in many other LMSes, and we approve of the reasoning behind this approach.
- Thinking Cap provides strong capabilities for creating and managing learning paths that can include a variety of learning formats as well as informal learning elements.
- Thinking Cap features one of the more administrator-friendly approaches we have seen to deploying multiple branded instances of the platform—a capability particularly attractive for associations that want to provide LMS services to chapters, corporate clients, or other groups with their own distinct needs.
- The LMS has been translated into English, French, Italian, Spanish Portuguese, Chinese, and Japanese on both the learner and administrative sides.

Thinking Cap seems well suited for larger, sophisticated associations—particularly those with corporate members or a chapter structure—but the price tag puts it in reach of smaller, forward-thinking, and ambitious associations too.

General Company Information

1. When was the company founded?
2001
2. How many employees does the company currently have?
25
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
Thinking Cap offers Thinking Cap Studio and Thinking Cap LMS. Studio is a tool for teams to create learning content and is focused on single sourcing and reuse. Thinking Cap LMS is an enterprise grade SCORM 2004 certified LMS.
5. Provide the company's contact information.
*250 The Esplanade #205
Toronto ON M5A 1J2
Canada
sales@thinkingcap.com
416-977-4675*
6. Provide the URL for the company's Web site.
http://www.thinkingcap.com
7. Provide any other information or notes relevant to the "General Company Information" section.
—
5. How many *associations* use this LMS?
6
6. How many organizations in total use this LMS, including associations?
25
7. How many end users are registered in the single largest client implementation *hosted by the company*?
35,000
8. How many end users are registered in the single largest client implementation *hosted by the client*?
72,000
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
400,000
10. Briefly describe the value proposition for this LMS as it applies to associations.
Because the domain structure allows for each group in an association to have their own area complete with their own gateway and branding it is attractive to associations.
11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
0%
 - 500 to 2,499 registered end users
20%
 - 2,500 to 4,999 registered end users
30%
 - 5,000 to 9,999 registered end users
20%
 - 10,000 to 24,999 registered end users
10%
 - 25,000 or more registered end users
20%

General LMS Information

1. What is the name of the LMS product?
Thinking Cap LMS
2. Provide the product version described in this survey response.
5.x
3. When was the first version of the LMS initially released?
1/1/2003
4. Briefly describe the upgrade cycles for the LMS.
Upgrades are delivered to our self-hosted and SaaS customers as an MSI Installer package that updates the software and the data structure. We deliver a monthly small update and aim at two major updates per year.
12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?
—

thinkingcap[®] lms

administration reports¹ social settings

administration
View and manage the Domain Tree of your organization. Use the Tree to quickly view your Domains and the Courses, Learning Paths and Learners contained within. This is the day-to-day management console of the LMS. From here you will be able to perform most administrative functions in the LMS.

reports
Choose from a list of Report Types and then configure each to run once or select to have your reports scheduled to run on a recurring basis and delivered to a list of recipients. In addition to on-screen and printable reports you can also download reports in XML format that include a richer set of data which you can manipulate in Excel.

social
Manage the interactions of Learners and Moderators beyond the classroom via Forums, Chat and Mailboxes. Here you can find all these social tools consolidated to make it simple to move from conversation to conversation across your organization.

settings
Control how the LMS is configured, from how it secures learner privacy to how it integrates with 3rd party Ecommerce and Webinar providers. Click here to fine-tune the LMS under the hood so it reflects your vision of a learning environment.

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The main Thinking Cap admin screen

The security settings screen, where administrators can manage log-in fields and more

thinkingcap[®] lms

administration reports¹ social settings

home > settings > security

log in management
Define the field to be used to uniquely identify Users accessing the system and set how passwords should be managed by the system.

system logs
Every action made by a User in Thinking Cap is logged by the system. This is true for both accesses via the Thinking Cap User Interface and actions taken via Web Services. Click here to view and export these logs.

roles and permissions
Every function in the LMS is expressed as a Permission that can be allocated to a user. Click here to define groupings of Permissions into Roles that can be applied to Users at various levels of the Domain Tree.

supervisor settings
The Superior functions in the Learner View allows day to day management of the learning activities of Users without the need to provide a Supervisor access to the Administrative interface of the LMS. Under Settings you can configure the rights you wish a Supervisor to have.

reports settings
Once a report is created it can be delivered to anyone you wish. How we authenticate your recipients is configured here. Also you can hide or show sensitive fields in the reports here.

challenges
Challenges allow you to define a new layer of security for Courses. Use Challenges to aid in safeguarding access to Course and Assessments.

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- 1,000 or less
 - 1,001 to 5,000
 - 5,001 to 10,000
 - 10,001 to 25,000
 - 25,001 to 50,000
 - 50,001 to 100,000
 - More than 100,000
13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?
- Less than 100
0%
 - 101 to 200
50%
 - 201 to 500
25%
 - 501 to 1,000
15%
 - 1,001 to 5,000
10%
 - More than 5,000
0%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
We have a wide range in our customers but some of the security tools we offer have made Health Care a larger sector than others for us.
15. Please list the company's top *association* clients.
Association of College and University Housing Officers - International • Association of Regional Center Agencies • Textiles Human Resources Council • Ontario Non-Profit Housing Association • National Roofing Contractors Association • Construction Sector Council
16. Please list the company's other (non-association) top clients.
Tyco Electronics • Terumo Medical • Taco Beuno • Teranet • Welcome to Parenting • LSU • PCA Skin • OTranspo
17. Provide a URL for more information about the LMS.
<http://www.thinkingcap.com/lms/lms.htm>

18. Provide any other information or notes relevant to the "General LMS Information" section.

We don't know individual members in the association numbers.

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)
- Complex
120
- Typical
30
- Simple
7
2. Briefly describe the implementation process.
All engagements involve onsite training to get administrators up to speed on using the LMS. Getting the base LMS in place for customers takes only a matter of a few days once paperwork is signed. Where implementations differ depends on two main variables; System Integration and Data Migration. Thinking Cap provides a questionnaire to help customers come to grips with what they would like to integrate with the LMS and the options for doing so. Based on this we develop an integration plan. One of the key strengths of Thinking Cap is that we expose all functions of the LMS as XML Web Services. This make all integrations to existing systems straight forward. As much as the Web Services are used to connect to external systems we can also create simple programs to load existing data into the

LMS. Because the format used to transfer data is XML we are able to do XSL transformations from any format we are given into the one required by the LMS. Once we have a good idea of the work to be done we provide clients with a Statement of Work outlining the work effort, deliverables, timelines and budgets.

3. Briefly describe the *company* personnel (by role) involved in the LMS implementation. *We have no sales people. The person who is your sales contact is also your Project Coordinator and will be the one to come out and do the training. This person will bring in any team members they need for you implementation. This normally involves a Programmer to build the integration pieces and do the data loads. In all implementations a Quality Assurance team member will provide sign off on the installation and any deliverables in a Statement of Work. Finally our clients are assigned a Support Coordinator who will be there day to day ongoing after the initial work is delivered.*
4. Please specify the location (by time zone) of company personnel involved in implementation. *-5 UTC*
5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation. *Someone on the client side needs to be the system administrator. This person as well as other administrators is the target of our training and is our single point of Project Management contact. In most installations someone from IT is involved.*
6. Provide any other information or notes relevant to the “LMS Implementation” section. *—*

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based

on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$27,500
 - 2,500
\$27,500
 - 5,000
\$39,000
 - 10,000
\$66,000
 - 25,000
\$135,000
 - Unlimited
\$135,000
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$57,500
 - 2,500
\$57,500
 - 5,000
\$87,000
 - 10,000
\$138,000
 - 25,000
\$255,000
 - Unlimited
\$255,000

3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$50,000
 - 2,500
\$50,000
 - 5,000
\$75,000
 - 10,000
\$120,000
 - 25,000
\$225,000
 - Unlimited
\$225,000
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$61,250
 - 2,500
\$61,250
 - 5,000
\$93,000
 - 10,000
\$147,000
 - 25,000
\$270,000
 - Unlimited
\$270,000
5. Briefly describe the pricing model for the LMS.
- Annual Licenses include Support, Upgrades and*

Hosting but you can optionally host them yourself. Perpetual Licenses are subject to a yearly 15% Support and Upgrades payment and hosting is at your location or with us for an additional fee. While you may need Professional Services purchased from us to integrate the LMS with your sites and applications basic setup of the LMS and adding initial Users, Courses and Metadata is normally included. SaaS vs. Perpetual Licensing Perpetual Licensing sells you a number of seats which are good forever. Each year you pay 15% of the original purchase price to maintain support and upgrades to the purchased product. You are responsible for hosting for the LMS which can be with us or at your own chosen data centre. Your license may be run over any number of servers without additional charge to allow for clustering and load balancing. Software as a Service (SaaS puts your entire LMS in the cloud. You have no responsibility for hosting or applying upgrades. SaaS is sold by the "Seat" just like the Perpetual but here you pay for your license on an annual basis. All SaaS customers get a 99.97% uptime guarantee as part of our comprehensive Service Level Agreement and all hosting is included. Some customers want the Annual License but still wish to host themselves. This is certainly an option. In general SaaS is targeted at those who want a complete package and want to be able to change their needs year to year. It is for a company that doesn't want to worry about servers or capacity and also customers that don't want to face a large capital outlay in the first year for an LMS. Over time the Perpetual model is cheaper and some organizations that start out as SaaS customers will convert to Perpetual. What is a Seat? A Seat is not a registered user. You can add any number of users to our LMS and none of them will be counted towards your License. A Seat is a user who is enrolled in at least one Course or Learning Path. Enrolling in a second Course or Learning Path doesn't take up another Seat. A user can be enrolled in any number of Courses and Learning Paths and is still

considered a single Seat. Once the user completes all the Courses and Learning Paths they are enrolled in, or the Course or Learning Paths reach their end dates the user is no longer counted as a Seat. The learner is still able to return to a course to review the material and their records stay in the system forever. Using this model a license for 1000 users can be used for tens of thousands of registered users who take course on a revolving basis.

6. Briefly describe the payment schedule.
Annual Fees are due on signing for one year. Professional Services are billed 30% on signing and balance on delivery.
7. Briefly describe pricing for additional services.
All services are billed at \$150 per hour. All training anywhere in the world is billed at \$1,500 per day including all expenses.
8. Provide any other information or notes relevant to the "Pricing" section.
As requested we gave numbers based on a guess of average professional services work our clients add to their license purchase. These add ons are by no means required.

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?
Windows Server 2003 / 2005 and SQL Server 2005 / 2008 Standard or better.
2. Briefly describe the technical framework and code structure of the LMS.
Thinking Cap is a .Net Application based on the 4.0 Framework. Thinking Cap is greatly influenced by Metadata and as such XML based metadata is used to automate many enrolment tasks.
3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.
All functions are exposed as XML Web Services. Very open for integration into any system.

4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.

Thinking Cap Learning Management System is built to be able to run across multiple servers all acting like one LMS. Thinking Cap can support the clustering of both the Application Server (IIS) and the database over multiple servers. Thinking Cap LMS supports both Software and Hardware clusters.

5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
None.
6. Provide any other information or notes relevant to the "Technology" section.
—

System Requirements

1. What are the technical requirements for an *end user* to access the LMS?
Thinking Cap clients can access the LMS via Mac, PC or Linux. Browser Support is provided for IE 8 and up, Chrome, Firefox, Opera and Safari. In addition to these desktops the LMS is tested for use on iOS and Android tablets.
2. What are the technical requirements for an *administrator* to access the LMS?
Same as above. The Administrative interface is built to work well in low bandwidth situations.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the "System Requirements" section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?

80%

2. Briefly describe the typical types of integration for the LMS.

The most common integration we see is predominantly creating a connection between the LMS and the User Management / Access Control systems that let us know who the users of the LMS are and information about them. In second place integration to accounting packs to report Ecommerce sales made in the LMS. From the other direction we have a number of clients that use the XML Web Services to pull information in real time from the LMS to power customized Learner Views often embedded into the customer's Website or Intranet.

3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.

XML Web Services.

4. Briefly describe the process used for planning and implementing integration between the LMS and another system.

Because we are dealing with XML and brokering messages between systems we will work with the customer to create a XML Schema and an Actively Diagram so both sides understand the data request and the result that can be expected. With this agreed to we can easily work on both sides knowing we will meet in the middle successfully.

5. With which of the following Webinar systems has the LMS been integrated for a client implementation?

- Adobe Connect
- Elluminate ✓
- Genesys
- GoToWebinar
- Microsoft Live Meeting
- ReadyTalk
- WebEx ✓
- Completely custom (non-commercial) Webinar system

- The LMS has never been integrated with a Webinar system.
 - Other (please specify)
6. With which of the following association management systems (AMSEs) has the LMS been integrated for a client implementation?
 - Aptify (Aptify)
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid)
 - CRM for Members (ProTech)
 - iMIS (Advanced Systems International)
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap)
 - netFORUM (Avecetra)
 - Office Manager (internet4associations)
 - Personify (TMA Resources)
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS ✓
 - The LMS has never been integrated with an AMS.
 - Other (please specify)
 7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
 - ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server ✓
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS ✓
 - The LMS has never been integrated with a CMS.
 - Other (please specify)
 8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.

Yes. While the content flow from any SCORM based LCMS is guaranteed by our SCORM

certification we are only integrated with our own Thinking Cap Studio LCMS.

9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
Yes. Thinking Cap LMS is tested to clear transactions via PayPal, Braintree, Authenticate.Net, Internet Secure and Transnational. We add new integrations to payment providers on request at no fee.
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
Yes. While the content flow from any SCORM based Authoring is guaranteed by our SCORM certification we are only integrated with our own Thinking Cap Studio. This said our clients have imported packages from every known authoring source.
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
No
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
No
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
No
14. Provide any other information or notes relevant to the “Integration and Interoperability” section.
The two questions about Testing and Libraries really should take into account that any of these systems can and should produce SCORM packages.

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?
—
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards.
 - Other (please specify)
2. Can the LMS play content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
3. Provide any other information or notes relevant to the “Standards and Guidelines” section.
—

Hosting

1. Is the LMS available as a *company-hosted* solution?
Yes
2. How many LMS installations are hosted by the *company*?
20
3. Is the LMS available as a *client-hosted* solution?
Yes
4. How many LMS installations are hosted by the *client*?
7

5. How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
6. If the company's LMS hosting is provided by a partner or partners, please list the name (s).

While we Manage the hosting ourselves we of course use a Data Centre. We use two data centres that are independent.
7. Briefly describe the company's preferred or recommended hosting option.

We prefer the SaaS model.
8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.

We provide a Service Level Agreement covering a 99.97% up time. Down time for upgrades are organized with each client individually.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing ✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations
10. Provide any other information or notes relevant to the "Hosting" section.

—

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?

Yes
2. Can end users specify their preferred language (which may differ from the default

site language)?

Yes

3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?

Yes
4. Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?

Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?

No
6. Provide any other information or notes relevant to the "Personalization" section.

—

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).

Yes. There is a combination of simple forms and the ability to inject custom CSS. This gives the most freedom. Also any given client may have any number of gateways to the LMS and each can be branded.
2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).

Yes. Only the nomenclature. All other UI is fixed in the Admin view.
3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.

Yes. Different navigation options can be turned off.

4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.
No
5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
Yes. All Learner facing text strings are modifiable as are all email notifications.
6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.
No
7. Provide any other information or notes relevant to the “Interface Configuration” section.
—

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
No
5. Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes
6. In how many countries has the LMS been implemented for clients?
9
7. Please list the countries where the LMS has been implemented for a client.
Canada, United States, Switzerland, India, Italy, China, Mexico, Oman and United Kingdom.
8. In how many languages has the LMS been implemented for clients?
9
9. Please list the languages in which the LMS has been implemented for a client.
German, Italian, English, Spanish, French, Portuguese, Korean, Chinese and Japanese.
10. How many language packs are available for the *end-user* view of the LMS?
9
11. Please list the languages for which a language pack is available for the *end-user* view.
German, Italian, English, Spanish, French, Portuguese, Korean, Chinese and Japanese.
12. How many language packs are available for the *administrator* view of the LMS?
9
13. Please list the languages for which a language pack is available for the *administrator* view.
German, Italian, English, Spanish, French, Portuguese, Korean, Chinese and Japanese.
14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
We allow our customers to override the translations we provide if they prefer to use string of their own.

Simple forms and custom CSS allow Thinking Cap clients to brand their end-user site.

The system settings allow administrators to specify available languages, customize automated notifications, and more.

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide).
 - End users can view and search catalogs before authenticating (logging in).
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll).
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog
 - Search across multiple catalogs ✓
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
3. What types of search are available to *administrators* in the LMS?
 - Search for other end users
 - The LMS does not support search by end users.
 - Other (please specify)
4. Provide any other information or notes relevant to the “Search and Catalogs” section.
 - Search within a single catalog
 - Search across multiple catalogs
 - Search general site content
 - Search within communication and collaboration tools (e.g., discussion boards)
 - Search for end users
 - Search for other administrators
 - The LMS does not support search by administrators.
 - Other (please specify)

A learner's view of a catalog in Thinking Cap

Logged in as: admin@agile.net | My Profile
[Switch to Admin View](#) | [Log Out](#) | [Home](#)

[Catalogue](#) [My Agenda](#) [My Courses](#) [My Learning Paths](#) [Glossary](#) [Social](#) [My Learners](#)

Catalogue

[Franchise Management](#)
 Everything you need to know about managing your franchise from upcoming promotions, to supply management, reporting to human resource management.

[Barista Training](#)
 Become an advance barista by following these training steps. These courses cover all aspects of creating the perfect cup of coffee, tea, ganita or juice.

[Team Member Training](#)
 Supporting the barista, serving customers, taking payments, team members are responsible for many things. All you need to know about keeping customers happy is right here.

[Food Preparation + Delivery](#)
 Baking a wide range of supplemental foods starts with simple recipes and ends with mouthwatering treats.

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts
 - Member-only discussion boards ✓
 - Electronic study guides
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games
 - CD-ROM or DVD-based education
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify) ✓

All. Our LMS sets Courses to complete when they “Roll Up” according to the rules in the SCORM Manifest.
3. Does the LMS provide the ability to author learning content?
 - Standard
 - Semi-standard
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how rich media is typically integrated.
We feel very strongly that a user should be able to bring in content from any source and that the process of course creation is beyond the LMS. We make an Authoring tool but for this reason it will never be integrated. We want the trust of our clients and building in our tools to the LMS looks to much like our favoring one tool over all the others.
5. Does the LMS support offline authoring of learning content?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the LMS supports offline authoring.
LMS is not an authoring platform.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Completely custom
 - Third-party
 - Unavailable ✓

- Check in/check out functionality
Unavailable
 - Ability to review content before it is published
Unavailable
 - Ability to assign tasks to administrators
Unavailable
 - Ability to monitor progress on tasks
Unavailable
 - Ability to add internal comments (viewable only by other administrators) to content
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
LMS is not an authoring platform.
7. Does the LMS provide for versioning of learning objects and maintain archival versions?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
8. Can the LMS generate printer-friendly content?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the printer-friendly option functions.
9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the digital rights management functions.
10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
-
- Browser-delivered online content
 - Downloadable version
 - CD or DVD
 - HTML
 - SWF
 - PDF
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓

15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
18. Does the LMS provide the ability to make a document library available to users?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).

We recommend you find an authoring tool that matches your production process.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning

Content" section.

We feel strongly that the process of managing delivery of content is the responsibility of the LMS and there is a long history of LMS look in via proprietary Authoring tools. We make a great authoring tool but its quality says nothing about the quality of our LMS. Both need to stand on their own.

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Standard
 - Personnel management (for scheduling instructors and facilitators)
Completely custom

Setting up an instructor-led class in Thinking Cap

classroom details

class size: Unlimited Wait List Additional
 wait list maximum: Unlimited
 cut off wait list: Hours prior to start

sessions

session title:
 session description:
 session date:

locations:
 Location:

times:
 Start Time: :01:00 AM
 End Time: :01:00 AM

number	session	starts	ends	location	required
1	Global Impact 2013 - Day One (Meet and Greet, followed by various lectures.)	05/18/2013 09:00 AM	05/18/2013 07:00 PM	Canada, Ontario, Toronto, 255 Front Street West, MSV 2W6, Metro Toronto Convention Centre.	<input type="checkbox"/>
2	Global Impact 2013 - Day Two (Lectures, a collaborative discussion forum featuring numerous guest speakers, and several informative workshops)	05/19/2013 09:00 AM	05/19/2013 05:00 PM	Canada, Ontario, Toronto, 255 Front Street West, MSV 2W6, Metro Toronto Convention Centre.	<input type="checkbox"/>

minimum number of optional sessions:

Record Score Record Comments

attendance

No Attendance taken
 Attendance taken by Moderator/TA
 Attendance taken by Learner
 Attendance taken by Learner and Moderator/TA

Show Learners on Sign-in page Show related content on Sign-in page Sign in using an ID badge

- Facility management (for scheduling rooms)
Standard
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Completely custom
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Standard
2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
No. But it can do this.
 3. Provide any other information or notes relevant to the “In-person, Place-based Courses” section.
—

Webinars

1. Does the LMS provide integrated Webinar functionality?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
—
2. Briefly describe the company’s preferred or recommended Webinar software.
We support WebEx.

3. Provide any other information or notes relevant to the “Webinars” section.
—

Registration

1. How can end users be registered in the LMS?
 - By self-registration ✓
 - By registration code or key
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify) ✓
Via outside systems connected by Web Services.
2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
4. Does the LMS provide self-serve password recovery help for end users?
Yes
5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
Yes
7. Can the fields for end user profiles be added, edited, and deleted?
Yes
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes

9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?

Yes

10. Provide any other information or notes relevant to the “Registration” section.

Our model of a tree of domains allows permissions to flow downwards in the tree and membership to flow upwards. This allows roles to be created centrally and applied as need across the organization.

Enrollment

1. How can end users be enrolled in courses in the LMS?

- By self-enrollment ✓
- By enrollment code or key
- By an administrator enrolling end users one by one ✓
- By an administrator performing a bulk upload ✓
- As the result of an e-commerce purchase ✓
- By self-enrollment with administrator approval ✓
- Other (please specify)

2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?

Yes

3. How administrators configure enrollment options?

- Sitewide
- At the catalog level
- By course group
- On a course-by-course basis ✓
- On an end user-by-end user basis
- Other (please specify)

4. Can enrollments occur based on end user-specific criteria?

- The end user’s role in the system ✓
- The end user’s score on an assessment

- The end user’s completion of prerequisites for a particular course ✓
- The LMS does not support enrollment based on end user-specific criteria.
- Other (please specify) ✓

By matching Metadata rules created for the course.

5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?

Yes

6. Provide any other information or notes relevant to the “Enrollment” section.

—

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?

Yes

2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user’s state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?

No

3. To what types of learning content can credit be assigned?

- Content delivered by the system (e.g., an online course that users access through the LMS) ✓
- Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓

thinkingcap lms

administration reports social settings

home > administration

administration

Domains

new edit learner view manage move delete

domain info users (937/1) online courses (2/1) assessments (2/0) instructor-led courses (3/4) learning paths (1/0) objectives (5) activities (7) metadata (6)

Course Title or Code search display Active

course code	course title	start date	enrolled	completed	series	actions
BASICS103	Cleaning the Espresso Maker	11/30/2011	2	0	n/a	demo feedback settings more actions
RETAILSAFE	Safety in the Workplace - Retail	02/01/2012	274	1	n/a	demo feedback settings more actions

update
references
survey
done
learners
bulk enroll
assignments
enrollment requests
assessment
chat
forum
ecommerce
sample
notifications
remove

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Administrators can bulk enroll users in courses.

Users with appropriate permissions can manage other users via the front-end interface.

Just Juice Training Portal

Catalogue
My Agenda
My Courses
My Learning Paths
Glossary
Social
My Learners

My Profile
Switch to Admin View
Log Out
Home

My Learners

My Learners Enrollment Requests

Aaron, Alberta
alberta.aaron@kcc.com
Enrol in Course Enrol in Learning Path Transcript

Abner, Margie
margie.abner@kmanufacturing.com
Enrol in Course Enrol in Learning Path Transcript

Jenkins, George
george.jenkins@kmanufacturing.com
Enrol in Course Enrol in Learning Path Transcript

Letendre, Katrina
katrina.letendre@kmanufacturing.com
Enrol in Course Enrol in Learning Path Transcript

- Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement)
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
 5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit
 - By an administrator awarding the credit to end users one by one
 - By an administrator performing a bulk upload
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
 6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
 - By the user claiming the credit
 - By the user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
 7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?

Yes

 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
 8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
 - Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
 9. Does the LMS help *end users* track their own continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No
 - Other (please specify)
 10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
 - Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users) ✓
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline)
 - No
 - Other (please specify)
 11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?

Yes

12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
No
14. How many clients use the LMS to manage continuing education or certification?
12
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE) ✓
 - Certificate of successful completion
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university ✓
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify)
16. Provide any other information or notes relevant to the "Managing Continuing Education and Certification" section.
We support outside and non standard content tracking but we were not conformable saying we gave "credit" for it. We do track and report on it.

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and

examinations)?

Yes

2. How does the LMS allow assessments to be used?
- Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course
 - Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?
Yes
4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
- Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
- Per question ✓
 - Based on whether the end user answered the questions correctly
 - Per distracter, or answer option
 - Based on which distracter the end user selected
 - Per assessment
 - Based on the end user's overall performance on the assessment
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)

6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
No
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
No
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
No
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers)
 - True/false or yes/no questions ✓
 - Text field
 - Fill-in-the-blank questions (where users type answers in fields in the questions)
 - Matching questions
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order)

- Hotspot questions (where users must select the correct area of a graphic)
 - Drag-and-drop questions ✓
 - Other (please specify)
18. Provide any other information or notes relevant to the “Assessments” section.
For a long time we fought adding in this functionality as we felt this should be done externally and added as a SCORM package. We have campaigned for a long time against LMSs that lock customers in why having them create proprietary content. We were able to reverse ourselves on this only because our internal assessment system creates exportable XML based SCORM packages where each question is a reusable SCO.

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course)
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
No
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
No
6. Does the LMS allow administrators to create question pools (for categorization or

organization purposes)?

No

7. Does the LMS allow administrators to create question banks (for reuse purposes)?
No
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
No
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013)
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated)
 - The LMS does not provide for time limits for evaluations. ✓
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row)
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields ✓
 - Date fields ✓
 - Time fields
 - Demographic information
 - Other (please specify)
11. Provide any other information or notes relevant to the “Evaluations” section.
We allow an evaluation to be created system wide and each Course can apply additional questions to what has been created globally.

Reporting

1. Does the LMS automatically record the date, time, and duration of end users' access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports ✓
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports ✓
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses) ✓
 - Other (please specify)
5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
12
7. List and briefly describe the standard, pre-configured reports available in the LMS.
Standard reports, summary reports, completion reports, transcript reports, cross training reports,

accreditation expiry reports, activity authentication reports, comparative reports, uptake reports, demographic reports, system access reports and exceptions reports.

8. Briefly describe the process for creating ad-hoc reports in the LMS.
Select the report type you want. Select in the tree of Domains the subset of the LMS you want to report on (unless it is one of the global comparative ones). Next select the options for the report you want including the course or learners to be included. Finally select any custom metadata filters you wish to be added.
9. How many custom reports does the company typically develop for a client implementation of the LMS?
0
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
Our clients create their own. The 12 frameworks out of the box allow them to do what they want. The XML export of report data lets them take it to the next level in external programs like Excel.
11. Provide any other information or notes relevant to the "Reporting" section.
All reports run on an ad hoc basis can be saved to run on a timed basis and also can be sent to a distribution list.

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓

From the main Reports screen, administrators can access Thinking Cap's standard reports or create their own.

home > reports

reports

my reports

View the list of reports you have created here. See both one-time reports and scheduled jobs. From here you can manage report delivery, view and print reports, and even export reports for deeper analysis.



standard reports

Standard reports are for reporting on a single Course or Learning Path. These reports can be targeted to any version of the course released and can employ a wide range of built in and definable filters.



summary reports

These reports allow you to get a high level report on a selected select a range of Courses or Learning Paths with definable Metadata filters.



completion reports

These reports give a list of the completion status for all Learners in a group or Learning Paths or Courses. Inversely a report can be defined that focuses on all the Completion Status of Learning Paths and Courses for a set group of Learners.



cross training report

These reports give a side by side comparison of the total active Learners in a selected domain and the number and percentage of those Learners who have completed the Courses or Learning Paths selected. The results may be filtered by a fixed or minimum number of Courses or Learning Paths completed as well as available user metadata.



accreditation expiry report

These reports give a list of the Learners whose Courses or Learning Paths expired or are set to expire in a time interval.



activity authentication report

These reports give a list of sign-off activities for the selected Learning Paths, Learners who completed the activities and who signed-off for each activity.



comparative report

These reports give a side by side comparison of the performance of multiple domains on a single Global Course or Learning Path. Results can be customized to include Completion, Success, Score and Time.



uptake reports

Select a group of Learners to get a report on how long they have individually and on average taken to both start and finish their first Course and Learning Path from the date they were added to the system.



demographic reports

The LMS contains a wide range of Metadata fields, both built-in and custom to the organization. This report lets you look at how this descriptive data is being filled out by Users, Course and other Objects in the system.



system access report

How are Learners using the system? Are Learners coming once in a while or are they constantly accessing Thinking Cap? Target individuals and groups with this report to look at system use and traffic patterns.



exceptions report

See what users completed a Course in a specific time interval or with a specified score.



my reports

PLEASE NOTE: All reports are generated using live data. During the process of running reports, any changes in the live data will be reflected in the completed report.

one-time reports | [scheduled/recurring reports](#)

report name	report type	creation date	status	actions
CourseUptakeReport_Global	courseUptake	10/30/2012 2:37:07 PM	Ready	view download create schedule delete
ActivityAuthenticationReport_Global	activityAuthentication	10/30/2012 1:03:18 PM	Ready	view download create schedule delete
ActivityAuthenticationReport_KC	activityAuthentication	10/30/2012 11:17:35 AM	Ready	view download create schedule delete
ExceptionsReport_Global	exceptions	10/25/2012 12:51:01 PM	Ready	view download create schedule delete
SummaryReport_KC	summary	10/23/2012 10:29:15 AM	Ready	view download create schedule delete
CourseCompletionReport_NDD	courseCompletion	10/16/2012 8:35:18 AM	Ready	view download create schedule delete
StandardReport_BARISTA_NDD	custom	10/16/2012 8:32:43 AM	Ready	view download create schedule delete
CourseCompletionReport_SCO	courseCompletion	7/30/2012 4:30:20 PM	Ready	view download create schedule delete
CourseCompletionReport_SCO	courseCompletion	7/30/2012 4:28:53 PM	Ready	view download create schedule delete
StandardReport_CSBASICS_SCO	custom	7/30/2012 4:26:22 PM	Ready	view download create schedule delete
ExceptionsReport_SCO	exceptions	4/11/2012 1:51:25 PM	Ready	view download create schedule delete
UserUptakeReport_KC	learnerUptake	4/11/2012 1:48:58 PM	Ready	view download create schedule delete
StandardReport_FOOD01_SCO	custom	4/11/2012 1:41:40 PM	Ready	view download create schedule delete
	crossTraining	3/22/2012 10:27:59 AM	Ready	view download create schedule delete
	courseCompletion	3/22/2012 10:26:45 AM	Ready	view download create schedule delete

On the My Reports screen, administrators can view the reports they have created, both one-time reports and scheduled jobs.

- Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
8
 3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
3
 4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.

We said 3 but this average is mathematical- their is no typical. Some have 1 and others have 26.

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
Unavailable
 - Live chats (for multiple end users)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Unavailable
 - Ability for end users to create and store notes or comments on learning content for their own use
Semi-standard
 - Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Semi-standard
 - Live voice-over-IP
Third-party
 - Virtual whiteboard
Unavailable
 - Virtual presentations (e.g., PowerPoint-driven)
Third-party
 - Screencasting
Third-party
 - Application-sharing
Third-party
 - Ability to associate a wiki with a course
Unavailable

thinkingcap lms
administration reports social settings

logged in as: admin@agile.net (est gmt-05:00)
account settings | switch to learner view | logout

home > replies

push reusable cups incentive program

kim's coffee company general forum
This is a forum for all Kim's Coffee Company employees to discuss and share ideas, questions, concerns, or just about anything related to the company, course material, learning system, etc.
Moderators: Terry, Terry

Go to Forum:
[Select Another Forum]

back to discussion list start new discussion

2 votes
vote

2 answers

7 views

replies post your reply

0 votes
vote

0 votes
vote

Thinking Cap™ LMS Copyright © 2011 Agile.net Inc. Version: 3.1.4689.14436

A discussion forum in Thinking Cap

- Single-point Web camera capability
Unavailable
 - Multiple-point Web camera capability
Unavailable
 - Networking (e.g., ability for end users to connect with one another)
Unavailable
 - Ability for each registered end user to have a blog
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
4. Provide any other information or notes relevant to the “Collaboration and Communication” section.
—

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Completely custom
 - Handles transactions for physical items (e.g., books or CDs)
Completely custom
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Unavailable

- Handles payment by invoice (manual intervention needed)
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles sales tax, including variations based on the state or region
Standard
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Unavailable
 - Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Semi-standard
 - Customizable e-mail message to administrators
Unavailable
 - Automatically maintains order status that can be checked by end user
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
- Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
 - Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net ✓
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris ✓
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify) ✓
Braintree, Internet Secure and First National.
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes. We don't keep the credit card info locally so this is very easy to be in compliance with.

6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.

We provide our own shopping basket and we simply convert our data structure to that of the selected provider. So integrations are all around back-end messaging. The experience is identical for the user.

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?

Yes

8. Provide any other information or notes relevant to the "E-commerce" section.

—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Live telephone support for end users

Unavailable

- Live telephone support for administrators

Standard

- E-mail support for end users

Unavailable

- E-mail support for administrators

Standard

- Self-serve, searchable knowledge base for end users

Unavailable

- Self-serve, searchable knowledge base for administrators

Standard

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Self-serve online training (e.g., tutorials) for end users

Unavailable

- Self-serve online training (e.g., tutorials) for administrators

Unavailable

- Scheduled online training (e.g., Webinars) for end users

Standard

- Scheduled online training (e.g., Webinars) for administrators

Standard

- Scheduled in-person training at client offices for end users

Standard

- Scheduled in-person training at client offices for administrators

Standard

- Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users

Standard

- Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators

Standard

- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

3. If applicable, briefly but specifically describe when telephone support for *end users* is available.

None. Their questions are always so subject matter driven we can't provide helpful support.

4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.

Phone support is available Monday to Friday 9am to 5pm eastern. This is being expanded in 2013 to 6am to 8pm.

5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.

Not applicable

6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
Monday through Friday, 8 am to 5 pm Eastern, excluding holidays.
7. Briefly describe the company's typical ongoing communication with its LMS clients.
We are not a huge company. We have almost nonexistent turnover of clients. This is due to our close ongoing working relations with them. This is done via emails, our automated ticketing system and on the phone. We know our client's plans and resources and we work very well getting them the support they need to be successful. We offer 9 to 5 support for standard day to day but we offer 24 x 7 monitoring and emergency response. And in addition when we know a new launch is going on or something else where we know we may be needed we will stay late or remain on standby.
8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
System issues that affect one user tend to affect all users. This is the nature of an online system. We have no relationship with end users and none of our clients has even thought we needed one.
9. Provide any other information or notes relevant to the "Support and Training" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved

custom programming work?

70%

3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
Custom work comes in two flavors. Where the addition is something that will make the overall system richer we add it into the LMS itself. In these case we also price the time at a significant discount. Other add-ons are custom to the client and these are built outside the system as separate projects that consume what they need from the LMS as XML Web Services. The majority of the work we do for clients involve both application and database programming in .Net, XSL and Java Script.
4. Briefly describe the process for used for planning and implementing custom programming work.
Starting with a Statement of Work that outlines the work to be done we provide Wireframes and a project plan. From here we work through an iterative development process with the client to deliver the required functionality.
5. Please specify the location (by time zone) of personnel involved in custom programming.
-5 UTC
6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel
 - Yes, through a partner ✓
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.
-5 UTC
8. Provide any other information or notes relevant to the "Custom Programming and Content Development" section.
—

TopClass WBT Systems



Industry focus: financial services, health care,
manufacturing, government, and pharmaceuticals

LMS Version: 9.1

Value proposition: WBT's Learning Management System, TopClass, manages all aspects of professional development and education, including an association's online and offline learning, certification programs and event management. WBT also offers a hosted solution, TopClass Accelerate, for smaller to mid sized associations with up to 10,000 members. For a single monthly fee, it provides access to a complete web based learning solution with online catalog, eCommerce, CEU tracking, online tests and event management.

Top clients (associations): American Health Information Management Association (AHIMA) • America's Health Insurance Plans (AHIP) • Association of Credit and Collection Professionals (ACA) • The Associated General Contractors of America (AGC) • Beta Theta Pi • Bureau of National Affairs (BNA) • International Society for Pharmaceutical Engineering (ISPE) • Institute of Chartered Accountants in Australia (ICAA) • New Zealand Institute of Chartered Accountants (NZICA) • The Materials information Society (ASM) • Society of Critical Care Medicine (SCCM) • International association for insurance and financial service professionals (LOMA)

Top clients (non-associations): The World Bank • Dow Chemical • Husqvarna • Miele • Valero Energy Corporation • ICON plc • Diageo • Navex Global • Volvo Construction Equipment • Alexander Forbes • Innovatia • Sinclair Oil • US Government • Standard Life • Ryanair • SKF Bearings • ABB Robotics

URL for more information about the LMS: • <http://www.wbtsystems.com/product/topclass-for-associations>

Three-year pricing: \$40,000 to \$290,000

Hosting: By company or client

WBT Systems

P.O. Box 801, 38 Spring Street
Nashua, NH 03060-0801

877-WBT-7700
603-654-3500

info@wbtsystems.com

<http://www.wbtsystems.com>

WBT SYSTEMS



Our Take on TopClass Some Highlights

Although WBT Systems has had a significant presence in the corporate market for many years, associations have become a major area of the company's business, and WBT Systems is focused on adding to a roster of clients that already includes America's Health Insurance Plans, the American Health Information Management Association, and the Associated General Contractors of America.

- WBT Systems emphasizes the degree to which TopClass is customizable. This is reflected not only in the use of cascading style sheets to control the user interface, but also in the ability to rename and attach extra information to nearly any functionality in the system.
- Combined interface customization and group management capabilities make it possible to provide a distinctly branded interface and a separate catalog for chapters or member companies.
- TopClass e-commerce functionality is among the best we have seen in any system. A number of clients, according to the company, have opted to replace their legacy shopping cart with the TopClass cart. One noteworthy feature of the system is the ability for a manager to make purchases on behalf of an employee or to buy in bulk and then distribute to employees—a good model for associations that sell courses to corporate purchasers.
- The system allows for “learning plans” that could be used, for example, to designate a set of courses required for a certification.
- Between versions 8 and 9, TopClass moved from Crystal Reports to Jasper Reports because, in addition to supporting robust reporting, the designer is available free of charge, so clients can write and deploy their own reports in TopClass without intervention from WBT Systems staff.
- The TopClass capabilities for administering instructor-led training (ILT) include tools for managing calendar and room conflicts. TopClass 9 features a bridge to Adobe Connect, which allows attendance in a Webinar to be automatically reported to the LMS. Also new in TopClass 9 is the ability for users to declare training they completed outside the LMS and related credits; users report the date the training was completed, the expiry date if relevant for credit, and the provider of the training and a description. They can also attach a document (e.g., a certificate of completion, a letter from an instructor, or some other proof of completion) to their external training entry.
- A license of TopClass Publisher, a simple authoring tool for courses and assessments, is included with TopClass. Microsoft Word and PowerPoint documents can be imported into Publisher for creating courses.

TopClass is one of the more feature-rich and sophisticated systems we reviewed. For organizations, especially larger ones, seeking maximum flexibility and strong e-commerce capabilities, TopClass is a solution to consider.



WBT's
European
Headquarters



WBT's
CEO,
Paul
Dooley

General Company Information

1. When was the company founded?
1995
2. How many employees does the company currently have?
49
3. Is the company privately or publicly held?
Public
4. Briefly describe the top three products or services the company offers.
WBT Systems provides learning solutions to associations and professional bodies. It's flagship product, TopClass, is a Learning Management System for the tracking and management of online and offline learning, certification programs and event management.
5. Provide the company's contact information.
*Mike Bourassa, WBT Systems
P.O. Box 801, 38 Spring Street
Nashua, NH 03060-0801
United States
info@wbtsystems.com
603-654-3500*

6. Provide the URL for the company's Web site.
<http://www.wbtsystems.com>
7. Provide any other information or notes relevant to the "General Company Information" section.
—

General LMS Information

1. What is the name of the LMS product?
TopClass
2. Provide the product version described in this survey response.
Version 9.1
3. When was the first version of the LMS initially released?
6/1/1995
4. Briefly describe the upgrade cycles for the LMS.
Upgrades cycles are approximately every 12 months.
5. How many associations use this LMS?
17

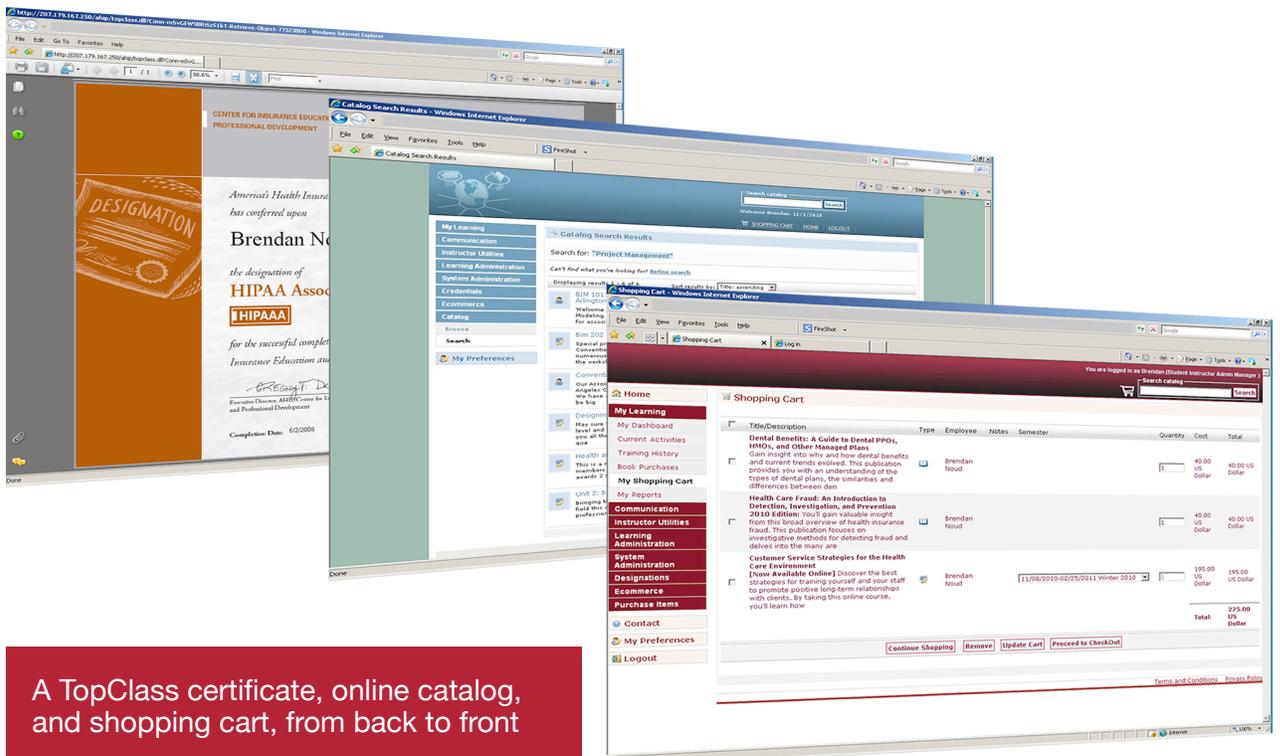
WBT's association staff: Mike Bourassa, US Sales, and Louella Morton, European Sales



6. How many organizations in total use this LMS, including associations?
102
7. How many end users are registered in the single largest client implementation *hosted by the company*?
50,000
8. How many end users are registered in the single largest client implementation *hosted by the client*?
1,300,000
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
2,600,000
10. Briefly describe the value proposition for this LMS *as it applies to associations*.
WBT's Learning Management System, TopClass, manages all aspects of professional development and education, including an association's online and offline learning, certification programs and event management. WBT also offers a hosted solution, TopClass Accelerate, for smaller to mid sized associations with up to 10,000 members.

For a single monthly fee, it provides access to a complete web based learning solution with online catalog, eCommerce, CEU tracking, online tests and event management.

11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
0%
 - 500 to 2,499 registered end user
0%
 - 2,500 to 4,999 registered end users
17%
 - 5,000 to 9,999 registered end users
29%
 - 10,000 to 24,999 registered end users
35%
 - 25,000 or more registered end users
19%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of *individual* members in the association?



- 1,000 or less
0%
 - 1,001 to 5,000
6%
 - 5,001 to 10,000
29%
 - 10,001 to 25,000
29%
 - 25,001 to 50,000
24%
 - 50,001 to 100,000
6%
 - More than 100,000
6%
13. What approximate percentage of your client implementations fall into the following size categories based on the number of organizational members in the association?
-
- Less than 100
0%
 - 101 to 200
0%
 - 201 to 500
0%
 - 501 to 1,000
5%
 - 1,001 to 5,000
20%
 - More than 5,000
75%
14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.
- In addition to the associations market, WBT serves a number of other industries including financial services, healthcare, manufacturing, government, and pharmaceuticals. The TopClass LMS is ideally suited to large organizations that are heavily regulated and have varying compliance requirements across multiple geographic locations. Dow Chemical, ICON Clinical Research, Sinclair Oil, Valero Energy Corporation and Bayer Healthcare are examples of such customers.*
15. Please list the company's top association clients.
- American Health Information Management Association (AHIMA) • America's Health Insurance Plans (AHIP) • Association of Credit and Collection Professionals (ACA) • The Associated General Contractors of America (AGC) • Beta Theta Pi • Bureau of National Affairs (BNA) • International Society for Pharmaceutical Engineering (ISPE) • Institute of Chartered Accountants in Australia (ICAA) • New Zealand Institute of Chartered Accountants (NZICA) • The Materials information Society (ASM) • Society of Critical Care Medicine (SCCM) • International association for insurance and financial service professionals (LOMA)*
16. Please list the company's other (non-association) top clients.
- The World Bank • Dow Chemical • Husqvarna • Miele • Valero Energy Corporation • ICON plc • Diageo • Navex Global • Volvo Construction Equipment • Alexander Forbes • Innovatia • Sinclair Oil • US Government • Standard Life • Ryanair • SKF Bearings • ABB Robotics*
17. Provide a URL for more information about the LMS.
- <http://www.wbtsystems.com/product/topclass-for-associations>*
18. Provide any other information or notes relevant to the "General LMS Information" section.
-

LMS Implementation

1. In calendar days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the

majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

180

Typical

90

Simple

30

2. Briefly describe the implementation process.

WBT Systems follows QuickValue Project Management Methodology with all TopClass implementations. This methodology follows the following phases:

- Project Kick-off
- Requirements workshops and documentation
- Solution Design
- Development / customization
- Solution Testing
- User Acceptance Testing
- Training
- Go-Live
- Handover to Customer Support

Each phase is supported by standard QuickValue documentation including communications plans, quality control processes, status and project board meetings, project log for managing issues / risks / change control, etc.

3. Briefly describe the *company* personnel (by role) involved in the LMS implementation.

The following roles would be involved in a typical TopClass implementation from a WBT perspective:

- Project Manager
- Business Analyst
- Solution Architect
- Implementation Consultants
- Account Manager (as required, e.g. Project Board Meetings)

4. Please specify the location (by time zone) of company personnel involved in implementation.

-5 and 0 UTC

5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.

The following roles would be involved in a typical TopClass implementation from a client perspective:

- Project Sponsor / Business Owner
- Project Manager
- Technical / IT representative
- Business owners as required (HR / Learning / Finance)

6. Provide any other information or notes relevant to the “LMS Implementation” section.

For all implementations WBT setup a replica environment in a WBT site, a UAT environment and a production environment. All code releases go through a strict release process through each of these environments. WBT also make a number of tools and templates (e.g. Bugzilla for issue tracking during the UAT cycle) available to our clients to assist with the implementation process and make it as smooth as possible.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

- 500
\$38,400
 - 2,500
\$62,000
 - 5,000
\$86,000
 - 10,000
\$116,000
 - 25,000
\$150,000
 - Unlimited
—
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$65,200
 - 2,500
\$106,000
 - 5,000
\$189,000
 - 10,000
\$237,000
 - 25,000
\$290,000
 - Unlimited
—
3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$30,000
 - 2,500
\$50,000
 - 5,000
\$68,000
 - 10,000
\$92,000
 - 25,000
\$120,000
 - Unlimited
—
4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
- 500
\$40,000
 - 2,500
\$70,000
 - 5,000
\$135,000
 - 10,000
\$165,000
 - 25,000
\$200,000
 - Unlimited
—
5. Briefly describe the pricing model for the LMS.
- WBT Systems offers flexible pricing solutions to suit the needs of a varied customer base. A once-off perpetual license fee, together with an annual maintenance fee, is the most common pricing structure requested by large corporate enterprises. However, this traditional model rarely suits the needs of Associations or professional bodies. WBT System's approach to pricing for such organizations involves spending a little time to understand the organization structure and business processes, and to develop a pricing structure to match these. Examples of*

such license fee pricing structures include per-user fee, per-course launch, revenue sharing and many others, often with different pricing for members and non-members, or for internal events compared to external events. Accordingly, WBT Systems does not force set pricing on Associations. Instead, we have found that working with an individual Association to arrive at a commercial model that suits that Association's needs paves the way for a long and mutually beneficial relationship.

6. Briefly describe the payment schedule.

—

7. Briefly describe pricing for additional services.

Services implementations costs can either be fixed price or on a time and materials basis, depending on the individual associations' requirements.

8. Provide any other information or notes relevant to the "Pricing" section.

—

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?

TopClass is supported on Windows 2008.

TopClass is supported on the following database configurations:

- *Oracle 10g or 11G*
- *SQL Server 2005 or 2008*
- *Support for SQL Server 2012 will be available at end of 2012*

2. Briefly describe the technical framework and code structure of the LMS.

The TopClass application is built in Java and is based on the Industry Standard Spring and Hibernate frameworks. It can be configured as either a 2 tier (application/Web server + database server) or 3 tier (application server + web server + database server) architecture. The web server can be either IIS or Apache. The front end of the application is template based allowing for ease of

customization without the need to change the core product.

3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.

TopClass has a fully exposed XML interface which allows for integration with any third party systems. As part of implementation projects WBT regularly integrates with association management systems, Finance, order fulfillment, HR, Resource planning and other bespoke systems. As part of Version 9.1 a fully integrated iMIS bridge for associations has been implemented which allows for direct user and group synchronization from an association's iMIS member database to the LMS, including "Just in Time" user creation.

4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.

TopClass is a highly scalable LMS built on the Java Spring Framework using Hibernate for database management. WBT have many large implementations with over 50 thousand users on the LMS. WBT's largest single instance implementation has over 300,000 users on it. As the latest version of TopClass is not fully java based this also enables clustering for Load/Balancing and failover purposes.

5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.

—

6. Provide any other information or notes relevant to the "Technology" section.

—

System Requirements

1. What are the technical requirements for an end user to access the LMS?

End users only require a web browser to access the LMS. TopClass itself can be access over a low connection speed but if clients have media rich content then they may require faster connection speeds.

2. What are the technical requirements for an *administrator* to access the LMS?
Administrators only require a web browser to access the LMS. TopClass itself can be accessed over a low connection speed but if clients have media rich content then they may require faster connection speeds.
3. Is the *end-user* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the *administrator* view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the "System Requirements" section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
90%
2. Briefly describe the typical types of integration for the LMS.
Outlined below is a list of the typical types of integration implemented by WBT Systems as part of a TopClass implementation:
 - *iMIS for many association implementations*
 - *E-Commerce / Shopping Cart systems*
 - *Single Sign-On / Network Management Systems (LDAP, Windows NT Unified Login, Siteminder, numerous in-house bespoke single sign-on applications and intranets)*
 - *Financial Systems (Peoplesoft, SAP, Epicor, various bespoke systems)*
 - *Live Meeting / Virtual Classroom systems*
 - *HR Systems (Peoplesoft, SAP, various bespoke systems)*
 - *Email systems (MS Outlook, Lotus notes)*
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
Typically WBT Systems uses TopClass's open xml interface to achieve integration and interoperability. For batched data exports / imports typically WBT would use agreed data formats such as CSV or tilde separated files as agreed with the client in question. Once data formats are agreed TopClass has a specific/configurable batch loader which is optimised for performance of loading bulk data.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
As part of WBT's QuickValue Methodology all integrations are documented as part of the solution design phase. They are then further documented and the approach, technologies, error handling and any other specific requirements relating to the integration points are agreed with the client in a Detailed Design document. All data flows are mapped out, file structures and formats agreed and all integrations are implemented with detailed logging in case of error checking and for audit purposes.
5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect ✓
 - Elluminate
 - Genesys
 - GoToWebinar
 - Microsoft Live Meeting ✓
 - ReadyTalk
 - WebEx ✓
 - Completely custom (non-commercial) Webinar system
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify) ✓
Centra

6. With which of the following association management systems (AMSeS) has the LMS been integrated for a client implementation?
- Aptify (Aptify)
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid)
 - CRM for Members (ProTech)
 - iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap)
 - netFORUM (Avecetra)
 - Office Manager (internet4associations)
 - Personify (TMA Resources) ✓
 - TIMSS (TMA Resources)
 - Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS
 - The LMS has never been integrated with an AMS.
 - Other (please specify)
7. With which of the following Web content management systems (CMSeS) has the LMS been integrated for a client implementation?
- ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server ✓
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS.
 - Other (please specify)
8. Has the LMS been tested for interoperability with any learning content management systems (LCMSeS), whether third-party or proprietary? If yes, please specify which LCMSeS.
Yes. WBT's own LCMS.
9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
Yes. Various bespoke shopping carts. Note: TopClass comes with it's own fully functional shopping cart which is used in many implementations where e-Commerce is required, as it has a wide range of functionality available.
10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
Yes. WBT Systems have their own online content authoring tool which can be used to build content and assessments/evaluations. Also, as TopClass supports the SCORM and AICC Standards, then authoring tools which build to these standards will be compatible with TopClass. Many of our customers use Lectora for building their content.
11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
Yes. WBT Systems have their own online content authoring tool which can be used to build content and assessments/evaluations.
12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
Yes. WBT Systems have their own online content authoring tool which can be used to build content and assessments/evaluations.
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
Yes. Skillsoft, Netg and many others.
14. Provide any other information or notes relevant to the "Integration and Interoperability" section.
—

Standards and Guidelines

- Does the LMS produce content that conforms to guidelines or standards?
 - AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards. ✓
 - Other (please specify)
- Can the LMS play content that conforms to guidelines or standards?
 - AICC ✓
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2 ✓
 - SCORM 2004
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
- Provide any other information or notes relevant to the “Standards and Guidelines” section.

—

Hosting

- Is the LMS available as a *company-hosted* solution?

Yes
- How many LMS installations are hosted by the *company*?

20
- Is the LMS available as a *client-hosted* solution?

Yes

- How many LMS installations are hosted by the *client*?

82
- How does the company provide LMS hosting?
 - On servers managed directly by the company ✓
 - On servers managed by a partner ✓
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify) ✓
Amazon Web Services.
- If the company’s LMS hosting is provided by a partner or partners, please list the name (s).

Innovatia in the US. Bonner Academy in Europe.
- Briefly describe the company’s preferred or recommended hosting option.

Hosting option is recommended by region and implementation size.
- If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.

Typically hosted solutions are on dedicated servers and all scheduled application down time is managed through the client communication plan and in line with the agreed hosting SLA put in place.
- If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
 - Yes, routinely as part of standard pricing
 - Yes, when requested for an additional fee ✓
 - No
 - Not applicable because the company does not host LMS installations
- Provide any other information or notes relevant to the “Hosting” section.

—

Personalization

1. Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
No
2. Can end users specify their preferred language (which may differ from the default site language)?
Yes
3. When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
4. Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?
Yes
5. Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities, profile data, or role in the system?
Yes
6. Provide any other information or notes relevant to the "Personalization" section.
All users in TopClass have access to a preferences section which allows them to set many end user features including the setup of their Dashboard, their preferred date format (DD/MM/YYYY or MM/DD/YYYY), their preferred time display (AM/PM or 24 Hr), page layouts, preferred items per page and email/notification preferences. Users can also have access to a color picker which lets them choose what color user interface they want to see the system in.

Interface Configuration

1. Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).

Yes. All branding and look and feel is driven via cascading style sheets and html.

2. Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).

Yes. All branding and look and feel is driven via cascading style sheets and html.

3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.

Yes. The navigation options for the end-user view of the LMS are fully customizable based on either user role, menu.js or group membership.

4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.

Yes. The navigation options for the administrator view of the LMS are fully customizable based on either user role, menu.js or group membership.

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.

Yes. All end-users have access to a preferences screen which allows them to specify what information they want to see on their dashboard, they can have access to as little or as much information as they would like.

6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.

Yes. All administrators have access to a preferences screen which allows them to specify what information they want to see on their dashboard, they can have access to as little or as much information as they would like.

7. Provide any other information or notes relevant to the “Interface Configuration” section.

—

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?
Yes
3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?
Yes
4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?
No
5. Can administrators change the default time zone used for formatting dates and times in the LMS?
Yes
6. In how many countries has the LMS been implemented for clients?
23
7. Please list the countries where the LMS has been implemented for a client.
United States, Canada, Australia, Austria, Belgium, Chile, Columbia, Costa Rica, Denmark, Democratic Republic of Congo, Finland, France, Germany, India, Ireland, Luxemburg, Netherlands, New Zealand, Russia, South Africa, Sweden, Switzerland, United Kingdom.

8. In how many languages has the LMS been implemented for clients?
18

9. Please list the languages in which the LMS has been implemented for a client.
Chinese, Danish, Dutch, English, Finish, French, German, Greek, Indian, Italian, Japanese, Korean, Norwegian, Polish, Portugese, Russian, Spanish, Swedish.
10. How many language packs are available for the *end-user* view of the LMS?
8
11. Please list the languages for which a language pack is available for the *end-user* view.
US English, UK English, French, German, Dutch, Danish, Italian, Japanese.
12. How many language packs are available for the *administrator* view of the LMS?
8
13. Please list the languages for which a language pack is available for the *administrator* view.
US English, UK English, French, German, Dutch, Danish, Italian, Japanese.
14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
The TopClass UI is fully language string based. This means any individual language string can easily be updated by a client administrator. It also means that it is very easy to translate the full TopClass UI into a complete new language if required.

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓

TopClass online catalog of courses

Catalog Search Results				
Can't find what you're looking for? Refine search				
Displaying results 1 - 15 of 15		Sort results by: Title: ascending		
	AICPA National Conference on Banks and Savings Institutions The AICPA National Conference on Banks and Savings Institutions is the must-attend event for accounting and auditing professionals working in all segments of the banking industry. Here, you'll be expo	Added: 03/10/2009	1200.00	Enroll Enroll employee Register Interest
	AICPA National Conference on Employee Benefits Plans The employee benefit plans conference is both for practitioners, administrators and plan sponsors. The only conference of its kind to address both the tax and audit side of employee benefits. Hear fro	Added: 03/10/2009	1075.00	Enroll Enroll employee Register Interest
	ASM Introduction Intro to TopClass version 1	Added: 05/07/2009	15.00	Enroll Enroll employee Register Interest Purchase Online Activity
	Auditor's Risk Assessment Process: Tackling the New Risk Assessment SASS Ideal for self-study or on-site training! The new risk assessment standards in SAS Nos. 104 through 111 will substantially impact the way audits are performed. They represent a major shift in the a	Added: 03/11/2009	193.00	Enroll Enroll employee Register Interest Purchase Online Activity
	Basics of Microsoft Office Working smarter is tied directly to the amount of time and effort it takes to capture and communicate information across the business. Learn how Office 2007 tools like Outlook, InfoPath, and OneNote c	Added: 03/12/2009	55.00	Enroll Enroll employee Register Interest
	CPEXpress CPEXpress is a comprehensive, easy-to-use online learning resource, and a great way to earn CPE. Need to brush up on a particular subject? Looking for a brief overview? CPEXpress has hundreds of hours	Added: 03/11/2009	435.00	Enroll Enroll employee Register Interest Purchase Online Activity

- End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users ✓
 - The LMS does not support search by end users.
 - Other (please specify)
 3. What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓
 - Search for other administrators ✓
 - The LMS does not support search by administrators.
 - Other (please specify)
 4. Provide any other information or notes relevant to the "Search and Catalogs" section.
 -

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓

- Educational simulations or games ✓
 - CD-ROM or DVD-based education ✓
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
- The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course.
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify) ✓
Additional rules can be specified using TopClass’s powerful roll-up rules.
3. Does the LMS provide the ability to author learning content?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
All content is available in the LMS as learning objects. These can be modules, pages, tests, questions, answers. All of these learning objects can be edited directly in the LMS by an administrator or instructor.
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
- The TopClass Authoring WYSIWYG editor allows for uploading and embedding rich media objects like audio and video. For very rich video, a dedicated Streaming Video server may be required which can then be integrated into the LMS content.*
5. Does the LMS support offline authoring of learning content?
- Standard
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable ✓
 - If yes, briefly describe how the LMS supports offline authoring.
WBT Systems have their own online content authoring functionality. This tool allows users to develop their own content using a WYSIWYG editor. They can import images, setup links between pages, develop tests and evaluations, import and embed media objects, use Cascading Style Sheets to control the look and feel of the content.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Check in/ check out functionality
Completely custom
 - Ability to review content before it is published
Standard
 - Ability to assign tasks to administrators
Completely custom
 - Ability to monitor progress on tasks
Semi-standard
 - Ability to add internal comments (viewable only by other administrators) to content
Semi-standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

7. Does the LMS provide for versioning of learning objects and maintain archival versions?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
8. Can the LMS generate printer-friendly content?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
-
9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
-
10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
- Browser-delivered online content ✓
 - Downloadable version ✓
 - CD or DVD
 - HTML ✓
 - SWF
 - PDF
 - Other (please specify) ✓
XML.
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
- Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company’s preferred or recommended authoring tool (which may or may not be the company’s own tool).

WBT Systems have their own online content authoring functionality. This tool allows users to develop their own content using a WYSIWYG editor. They can import images, setup links between pages, develop tests and evaluations,

Import and embed media objects, use Cascading Style Sheets to control the look and feel of the content.

20. Provide any other information or notes relevant to the “Authoring, Managing, and Displaying Learning Content” section.
-

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Standard
 - Personnel management (for scheduling instructors and facilitators)
Standard

The screenshot shows a web application window titled "Location Management" for "Marriott Wardman Park Hotel (Washington_Hotel)". It features a "Location Search" dropdown and a "General Location Properties" section with tabs for "General", "Contact Info", "Rooms", "Equipment", and "Schedule". The "General" tab is active, showing fields for Code (Washington_Hotel), Title (Marriott Wardman Park Hotel), Active (checked), Located in (Select), Description (This location has 30 Rooms available), URL (http://www.marriott.com with a Verify button), Owner (Select), and Capacity (300).

TopClass
resource
management

- Facility management (for scheduling rooms)
Standard
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Standard
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Standard
 - Customizable e-mail messages and notifications to administrators
Standard
2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
- Yes. Several of WBT's Association clients use TopClass's Event Management Module to manage the setup, scheduling and management of their conferences and seminars. TopClass provides full waitlist management, registration, resource management and conflict management functionality. It is also possible to setup recurring sessions, multi-tracked conferences, print off rosters and attendee lists, setup cancellation / no-show policies, mark attendance, partial attendance, transfer users and batch enroll users in a session. From a registration perspective conference attendees can register their interest for an event, purchase credit to be used across a number of sessions, download any pre-reading associated with the event as well as any documents available after attendance (e.g. speakers slides / notes).*
3. Provide any other information or notes relevant to the "In-person, Place-based Courses" section.
-

Webinars

1. Does the LMS provide integrated Webinar functionality?
- Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).
TopClass has an inbuilt integration with Adobe Connect. Typically TopClass integrates with other Webinar software using the products xml interface. Two-way integration allows for users to log directly into the Webinar session via single sign-on and for completion data to be passed back to the LMS at the end of the Webinar for tracking in the LMS.
2. Briefly describe the company's preferred or recommended Webinar software.
Adobe Connect is the webinar software which WBT has built a standard integration with. WBT would be in a position to integrate with any of the other most common Webinar products on the market such as Live Meeting, Webex, GoToMeeting, etc.
3. Provide any other information or notes relevant to the "Webinars" section.
-

Registration

1. How can end users be registered in the LMS?
- By self-registration ✓
 - By registration code or key
 - By an administrator registering end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-registration with administrator approval ✓
 - Other (please specify) ✓
Via integration with HR or other systems.

2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?
Yes
3. Does the LMS provide secure authentication for end users with a valid log-in and password?
Yes
4. Does the LMS provide self-serve password recovery help for end users?
Yes
5. Can administrators define new *end-user* roles with distinct rights and access in the site?
Yes
6. Can administrators define new *administrator* roles with distinct rights and access in the site?
No
7. Can the fields for end user profiles be added, edited, and deleted?
Yes
8. Is the content of profile fields updatable by end users if allowed by administrator?
Yes
9. Can individual end users specify which of their profile data is viewable by other end

users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?
No

10. Provide any other information or notes relevant to the "Registration" section.
A more complex custom Role management function is in the Product Roadmap for completion in Q12013.

Enrollment

1. How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify) ✓
Via TopClass's powerful group joining operations or via integration with a HR or other system.

TopClass homepage

The screenshot shows the TopClass 9 LMS interface. At the top, it says "You are logged in as John (Student)". The main navigation menu includes Home, My Learning, Collaboration, Catalog, Reports, My Preferences, and Logout. The content area is divided into several sections:

- My Current Activities:** A table showing active courses.

Class name	Type	Start Date	End date	Status	Action
HR Essentials Webinar Series - Part 2 (HR Essentials Webinar Series - Part 2)		11/19/2012 12:00	11/19/2012 13:30	Enrolled	Meeting Cancel
Introduction to budgetting (Introduction to budgetting)		09/03/2012 09:00	09/06/2012 17:00	Attended Pending Postwork	Launch Postwork
TopClass Java				In progress	Cancel
- My Training History:** A table showing completed and attended courses.

Title	Date	Type	Status	Credits	Action
New HRM trends article	10/16/2012 00:00		Completed	1	
Introduction to budgetting (Introduction to budgetting)	09/06/2012 17:00		Attended	4	
HR Essentials Webinar Series - Part 1 (HR Essentials Webinar Series - Part 1)	08/06/2012 13:30		Attended	1	
				Total Credits:	6.00
- My Skills Profile:** A table showing skills acquired.

Title	Type	Required date	Awarded by	Completed	Action
Certified HR Professional		11/30/2012	HR Essentials Webinar Series - Part 2		
- New Courses:** A table showing available courses.

Code	Title
GDILTTG03	HR Essentials Webinar Series - Part 2
TopClassJ	TopClass Java
- Latest news:** A banner for "iMIS integration bridge now available in TopClass 9" with the iMIS 15 logo and a link to additional information.

2. Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?

Yes

3. How administrators configure enrollment options?
- Sitewide ✓
 - At the catalog level ✓
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis
 - Other (please specify)
4. Can enrollments occur based on end user-specific criteria?
- The end user's role in the system ✓
 - The end user's score on an assessment ✓
 - The end user's completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)
5. Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?

Yes

6. Provide any other information or notes relevant to the "Enrollment" section.
- TopClass's group joining operations allows users to be automatically enrolled in 1 or more courses based on their membership of a particular group or any combination of groups setup in the LMS.*

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?

Yes

2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different

credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?

Yes

3. To what types of learning content can credit be assigned?
- Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement) ✓
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
- Automatically upon end user completion of the content ✓
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
- By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓

- By the end user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
- By the user claiming the credit ✓
 - By the user claiming the credit and an administrator approving the claim ✓
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
- Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)
9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines) ✓
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline)
 - No
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users) ✓
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
Yes. TopClass allows end users to build up their transcript or professional portfolio so that it can include courses and live sessions completed / attended by the user and also allows them to upload training or professional development that they completed outside of the LMS.
14. How many clients use the LMS to manage continuing education or certification?
9
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE) ✓
 - Continuing professional education (CPE) ✓
 - Certificate of successful completion ✓

- Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify)
16. Provide any other information or notes relevant to the “Managing Continuing Education and Certification” section.
TopClass has advanced Continuing Education tracking functionality which allows multiple credentialing organizations to be linked to a particular course and for each to offer it's own unique CEU ratings based on Instructor Contact Hours or other criteria as might be the case.

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
 - Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify)
3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?
Yes
4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
 - Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment)
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
 - Per question ✓
 - Based on whether the end user answered the questions correctly ✓
 - Per distracter, or answer option ✓
 - Based on which distracter the end user selected ✓
 - Per assessment ✓
 - Based on the end user's overall performance on the assessment
 - The LMS does not provide for automatic feedback for assessments.
 - Other (please specify)
6. Can the LMS automatically display a summary screen to show the end user her assessment score?
Yes
7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?
No
8. Does the LMS automatically link assessment data to the performance reports available in the system?
Yes
9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
No

10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify)
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
 - The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order)
 - Hotspot questions (where users must select the correct area of a graphic) ✓
 - Drag-and-drop questions ✓
 - Other (please specify) ✓
- Upload Questions.*
18. Provide any other information or notes relevant to the “Assessments” section.
Tests can also be setup so that users can take the tests in Try Out or For Credit mode. Users can also select their Confidence Level on a question by question basis which provides valuable information to highlight if questions are too easy, too difficult or ambiguous in how they are written. As well as allowing questions to be randomly selected from a question pool, TopClass also provides functionality to highlight questions which should always be included from a particular pool or always excluded.

Evaluations

1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
No
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a trigger event (e.g., 30 days from when the end user completes the online course

- with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row) ✓
 - Matrix of choices (multiple answers per row) ✓
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields) ✓
 - Number fields
 - Date fields
 - Time fields
 - Demographic information
 - Other (please specify) ✓
Upload feedback documents.
 11. Provide any other information or notes relevant to the "Evaluations" section.
—

Reporting

1. Does the LMS automatically record the date, time, and duration of end users' access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes
4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓

- Provides a built-in tool for creating ad-hoc reports ✓
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports ✓
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses) ✓
 - Other (please specify) ✓
TopClass uses the JasperSoft Reporting Suite which allows for standard reports to be developed in iReports and also allows for Ad-hoc querying of pre-built Domains. WBT can generate extended domains of data for Ad-hoc reporting based on specific client needs.
5. How are the LMS reports made available?
- View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
20
7. List and briefly describe the standard, pre-configured reports available in the LMS.
- *Student Reports*
 - ▶ *Training History*
 - *Manager Reports*
 - ▶ *Training History*
 - ▶ *Current Activities*
 - *Instructor Reports*
 - ▶ *Online Course Progress Report by Class*
 - ▶ *Online Course Progress Report by Student*
 - ▶ *Test Effectiveness Report*
 - *Admin Reports*
 - ▶ *Competency Reports by Competency or Group*
 - ▶ *Survey / Evaluation Reports*
- *Administrator Reports*
 - ▶ *Usage Report*
 - ▶ *Sales Report*
 - ▶ *Entity Reports*
8. Briefly describe the process for creating ad-hoc reports in the LMS.
New reports are specified and developed using iReports for uploading into the LMS report repository. These reports typically have various run-time parameters, are available to various roles, can be sorted by various criteria and output in various formats, csv, pdf, to screen or email. TopClass also has an optional Ad-Hoc Query module which allows for the creation, editing, saving and scheduling of ad-hoc queries for business analysis purposes.
9. How many custom reports does the company typically develop for a client implementation of the LMS?
2
10. Briefly describe the type of custom reports most typically developed for client implementations of the LMS.
The custom reports developed as part of a TopClass implementation vary greatly depending on specific client needs but can cover anything from specific shopping cart/eCommerce data to advanced profiling of user's training data or class completions.
11. Provide any other information or notes relevant to the "Reporting" section.
JasperSoft allows for all reports to be set up as scheduled tasks by end users, based on pre-defined parameters.

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client's different chapters, departments, or programs) from a single implementation?
 - The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓

- Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
 - Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?
10
 3. On average, how many sites are part of a client's multiple-site implementation of the LMS?
50
 4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.

The number of different sites on a client implementation can vary from a very small number to very large, e.g. 1000's. Using TopClass's group structure to drive the look and feel of a particular site provides clients with a huge amount of flexibility in this area.

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - End user-to-end user e-mail
Standard
 - End user-to-administrator e-mail
Standard
 - Administrator-to-end user e-mail
Standard
 - Broadcast messaging to all end users
Standard
 - Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
 - Instant messaging (one-on-one)
—
 - Live chats (for multiple end users)
—
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Ability to organize end users in groups for collaborative work
Standard
 - Ability for end users to create and store notes or comments on learning content for their own use
Completely custom
 - Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard
 - Live voice-over-IP
Unavailable
 - Virtual whiteboard
Unavailable
 - Virtual presentations (e.g., PowerPoint-driven)
Unavailable

Summary									
Order Summary Screen									
Mike Bourassa 123 Main Street Boston 02123									
Qty	Employee	Item Name	Token Used	Coupon Used	Price	Handling	Total		
<input type="checkbox"/>		Auditor's Risk Assessment Process: Tackling the New Risk Assessment SASs							
<input type="checkbox"/>	1	Mike Bourassa			193.00			193.00	
		Auditor's Risk Assessment Process: Tackling the New Risk Assessment SASs Ideal for self-study or on-site training! The new risk assessment standards in SAS Nos. 104 through 111 will substantially impact the way audits are performed. They represent a major shift in the a							
Subtotal								193.00	
Overall Total								193.00	
<input type="button" value="Back"/> <input type="button" value="Delete Selected"/> <input type="button" value="Update Cart"/> <input type="button" value="Next"/>									

Paying for a course online in TopClass

- Screencasting
Unavailable
 - Application-sharing
Unavailable
 - Ability to associate a wiki with a course
Completely custom
 - Single-point Web camera capability
Unavailable
 - Multiple-point Web camera capability
Unavailable
 - Networking (e.g., ability for end users to connect with one another)
Standard
 - Ability for each registered end user to have a blog
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
No
 4. Provide any other information or notes relevant to the "Collaboration and Communication" section.
—
- ### E-commerce
1. Which types of e-commerce transactions are available through your LMS? Mark each as
 - standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Standard
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
TopClass also handles payment using pre-paid debit accounts as standard.
 2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Handles sales tax, including variations based on the state or region
Standard
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Standard
 - Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Standard
 - Automatically maintains order status that can be checked by end user
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
 - Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
TopClass also handles early bird discounts and cross-sell / up-sell features as standard.
4. Which payment gateways are supported by the e-commerce system?
- 2Checkout
 - Authorize.Net
 - BluePay
 - CCAvenue
 - CyberSource
 - EBS
 - EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify) ✓
While TopClass has only being integrated with PayPal PayflowPro to-date but the eCommerce module can be easily configured to work with any other payment gateways.
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.
Yes
6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
TopClass has it's own e-Commerce Module available which has been developed specifically to meet the needs of associations. It offers multiple

pricing options including chapter, member and non-member pricing, multiple payment options including credit card, bill me, debit account, tokens and coupons. It also provides a cross-sell / up-selling feature, the option to set early bird pricing and customized notifications all of which can be used for further marketing. User's can also "Purchase Credit" which can then be used by members of that organization to buy courses or sign-up for events. Associations can also choose to use their own or an alternative e-Commerce system instead and WBT can integrate with that using the TopClass xml interface.

7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
Yes
8. Provide any other information or notes relevant to the "E-commerce" section.
—

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Live telephone support for end users
Unavailable
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Unavailable
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Unavailable
 - Self-serve, searchable knowledge base for administrators
Unavailable
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

In standard, administrators also have access to a web-based support system.

2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Self-serve online training (e.g., tutorials) for end users
Unavailable
 - Self-serve online training (e.g., tutorials) for administrators
Unavailable
 - Scheduled online training (e.g., Webinars) for end users
Unavailable
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Unavailable
 - Scheduled in-person training at client offices for administrators
Standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Unavailable
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
Not applicable
4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
9.00am to 5.30pm GMT, Monday to Friday excluding Public Holidays.

5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
Not applicable
6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
9.00am to 5.30pm GMT, Monday to Friday excluding Public Holidays.
7. Briefly describe the company's typical ongoing communication with its LMS clients.
All clients are assigned a WBT Account manager who acts as the on-going point of contact for communications with the Client. This includes regular update calls and client visits to ensure the client is satisfied with the LMS implementation and customer support they are receiving from WBT.
8. Briefly describe the company's typical ongoing communication with its LMS clients' end users.
—
9. Provide any other information or notes relevant to the "Support and Training" section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
90%
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.

Custom programming on client implementations typically includes all or some of the following:

- *Integrations*
 - *Workflow changes*
 - *New screens / functionality*
 - *Custom reports*
 - *UI / Branding*
4. Briefly describe the process for used for planning and implementing custom programming work.
All custom programming work is first documented in a functional specification document which includes mock-ups, screenshots and dataflows. Once the requirements are signed off then a solution and detailed design specs are documented. The code is then developed, tested and code reviewed before being released to the client's UAT environment.
 5. Please specify the location (by time zone) of personnel involved in custom programming.
0 UTC
 6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel
 - Yes, through a partner ✓
 - No
 - Other (please specify)
 7. Please specify the location (by time zone) of personnel involved in custom content development.
-5 and 0 UTC
 8. Provide any other information or notes relevant to the "Custom Programming and Content Development" section.
—

CourseStage Web Courseworks

LMS Version: R10.1

Value proposition: As a learning management system provider and a custom eCourse development company, Web Courseworks understands the importance of an association's mission to deliver multifaceted eLearning. CourseStage is a learning management system (LMS) built for associations and non-profits. Our CourseStage LMS offering is designed to maximize the value of the learning with an intuitive, flexible platform. Developed based on the open-source platform Moodle and delivered as a hosted solution, CourseStage offers an unparalleled combination of features and value for associations. Our clients use CourseStage to

- Generate non-dues revenue with the integrated eCommerce storefront.
- Rapidly author media-rich online courses
- Track learning with flexible real-time reports
- Manage continuing education credits and certification programs
- Seamlessly communicate with association management systems
- Build a community of knowledge for their membership base

Our primary differentiator from other LMS companies lies in our background in instructional design and innovative eLearning program evaluation. Our company philosophy is "It's not the eLearning platform. It's the performance." The learning management system is the stage for our clients' content—we work with our clients to ensure a successful launch of eLearning initiatives with valuable, intuitive content delivered via a feature-rich platform.

Top clients (associations): America's Health Insurance Plans (AHIP) • Alliance for Continuing Education in the Health Professions (ACEHP) • American College of Chest Physicians (ACCP) • Certified Commercial Investment Member Institute (CCIM) • Association of Nutrition and Foodservice



Industry focus: healthcare, finance, and compliance

Professionals (ANFP) • Medical Group Management Association (MGMA) • National Association of Home Builders (NAHB) • Nurses Improving Care for Healthsystem Elders (New York University) • World Anti-Doping Agency (WADA) • North American Retail Dealers Association (NARDA) • Credit Union National Association (CUNA) • Girl Scouts (San Jacinto Council) • Children's Hospital of Wisconsin

Top clients (non-associations): BMO Harris Bank • GE Healthcare • McDonald's Corporation • Mars Drinks • J.J. Keller & Associates • University of Wisconsin—Department of Engineering Professional Development Program • Magna Publications • Johnson Controls • Myriad Genetics • WellPoint • Humana • Aetna

URL for more information about the LMS: • <http://www.webcourseworks.com/hosted-software/coursestage-lms>

Three-year pricing: \$36,000 to \$200,000

Hosting: By company only

Web Courseworks

Madison Office:
7617 Mineral Point Road
Suite 301
Madison, WI 53717

800.236.8588

jonaleckson@webcourseworks.com

<http://www.webcourseworks.com>



WEB COURSEWORKS

Our Take on CourseStage Some Highlights



Developed specifically for associations, nonprofits, and public organizations, CourseStage leverages the popular open-source platform Moodle, although it has moved away from the base Moodle look and feel over the years, implementing highly customized interfaces that align better to the needs of its clients.

In addition to hosting and supporting CourseStage, Web Courseworks provides extensive training for clients who want to develop their own content using standard Moodle tools, its CourseCreate authoring system, or popular third-party applications. For associations who don't want to do it on their own, the company also has a long track record in custom online training, simulations, and game-based learning.

- Learning plans handle prerequisites and provide different views of mandatory versus optional or recommended courses.
- To better support social learning, Web Courseworks has enhanced the base Moodle discussions, adding, for example, functionality to merge threads and create PDFs for archiving or repurposing the forum content.
- For associations who don't opt to use an association management system's e-commerce, Web Courseworks has introduced a robust shopping cart for CourseStage, built on Magento.
- The platform can handle complex certification scenarios. Administrators can manage the different credit types available in CourseStage and set default expirations to be applied to courses (defaults can be overwritten for individual courses).
- The live training module can be used for completely live and hybrid events, which can be viewed via a calendar that users can filter by month and location.
- Assessments in CourseStage can be used diagnostically—a la the perennial magazine quiz. Rather than rating an answer right or wrong, points associated with each answer ultimately determine the user's score which then can be translated into a recommendation—e.g., “Based on your responses, you seem interested in X, so explore these courses.”
- CourseStage's sister product CourseCreate—a hosted, Web-based, collaborative authoring tool that produces SCORM-compliant, XML-driven Flash tutorials, assessments, and learning objects—now includes a simulation template that supports branching and has been popular with Web Courseworks' medical clients.
- A company representative described 2012 as the year of integrations for Web Courseworks. CourseStage has now been integrated with the major AMSes (Personify, netFORUM, iMIS, ClearVantage, etc.) for not only single sign-on but also e-commerce and transcript data; a number of Webinar platforms, including WebEx, Adobe Connect, and the CommPartners platforms; and other third-party or client-proprietary systems.
- Web Courseworks streamlines all support requests through its online support center and plans to turn the site into a knowledge center, allowing clients to post tips and tricks of their own.

For associations that are attracted to an open-source philosophy and its crowd-sourcing benefits but that don't have the appetite for the hard work of customizing Moodle to their uses, Web Courseworks represents an ideal middle ground, offering an intelligent approach to improving the base Moodle code for clients and providing hosting, support, and custom content development.

General Company Information

1. When was the company founded?
1999
2. How many employees does the company currently have?
30
3. Is the company privately or publicly held?
Private
4. Briefly describe the top three products or services the company offers.
 - *CourseStage LMS: Hosted learning management system for associations and non-profits.*
 - *CourseCreate: Hosted, web-based authoring system designed for collaborative creation of SCORM-compliant learning objects and tutorials.*
 - *Custom eLearning: Web Courseworks team of instructional designers and programmers produce award-winning, adaptive eLearning courses, games, and simulations.*
5. Provide the company's contact information.
*7617 Mineral Point Road, Suite 301
Madison, WI 53717
1-800-236-8588
jonaleckson@webcourseworks.com*
6. Provide the URL for the company's Web site.
http://www.webcourseworks.com
7. Provide any other information or notes relevant to the "General Company

Information" section.

Web Courseworks (WCW) was established in 1999 as the eLearning division of Madison Productions Incorporated, a privately-held corporation with more than 30 years experience successfully producing eMedia and developing educational technology. Web Courseworks has a national reputation for documenting process and delivering disciplined project management. Our combination of development technology, time-tested process, and a talented staff result in successful project execution commensurate with each client's time and budgetary requirements.

General LMS Information

1. What is the name of the LMS product?
CourseStage
2. Provide the product version described in this survey response.
R10.1
3. When was the first version of the LMS initially released?
9/1/2007
4. Briefly describe the upgrade cycles for the LMS.

CourseStage

 WEB COURSEWORKS



Jon Aleckson, CEO of • Web Courseworks

Web Courseworks
headquarters in Madison, WI

Web Courseworks operates on a SaaS model, with new features available generally every 120 days. Clients are notified of new functionality options. Features can be enabled or disabled by site-specific LMS administrators.

5. How many associations use this LMS?
21
6. How many organizations in total use this LMS, including associations?
47
7. How many end users are registered in the single largest client implementation hosted by the company?
70,000
8. How many end users are registered in the single largest client implementation hosted by the client?
Not applicable
9. How many end users are registered across all client implementations of the LMS (including those hosted by the clients and by the company)?
300,000
10. Briefly describe the value proposition for this LMS as it applies to associations.
As a learning management system provider and a custom eCourse development company, Web Courseworks understands the importance of an association's mission to deliver multifaceted eLearning. CourseStage is a learning management system (LMS) built for associations and non-profits. Our CourseStage LMS offering is designed to maximize the value of the learning with an intuitive, flexible platform. Developed based on the open-source platform Moodle and delivered as a hosted solution, CourseStage offers an unparalleled combination of features and value for associations. Our clients use CourseStage to
 - *Generate non-dues revenue with the integrated eCommerce storefront.*
 - *Rapidly author media-rich online courses*
 - *Track learning with flexible real-time reports*
 - *Manage continuing education credits and certification programs*
 - *Seamlessly communicate with association management systems*

- *Build a community of knowledge for their membership base*

Our primary differentiator from other LMS companies lies in our background in instructional design and innovative eLearning program evaluation. Our company philosophy is "It's not the eLearning platform. It's the performance." The learning management system is the stage for our clients' content—we work with our clients to ensure a successful launch of eLearning initiatives with valuable, intuitive content delivered via a feature-rich platform.

11. What approximate percentage of your client implementations fall into the following size categories based on registered end users?
 - 499 or fewer registered end users
28%
 - 500 to 2,499 registered end users
44%
 - 2,500 to 4,999 registered end users
9%
 - 5,000 to 9,999 registered end users
5%
 - 10,000 to 24,999 registered end users
9%
 - 25,000 or more registered end users
5%
12. What approximate percentage of your association implementations fall into the following size categories based on the number of individual members in the association?
 - 1,000 or less
14%
 - 1,001 to 5,000
7%
 - 5,001 to 10,000
14%
 - 10,001 to 25,000
37%
 - 25,001 to 50,000
14%
 - 50,001 to 100,000
7%
 - More than 100,000
7%

13. What approximate percentage of your client implementations fall into the following size categories based on the number of *organizational* members in the association?

- Less than 100
20%
- 101 to 200
0%
- 201 to 500
20%
- 501 to 1,000
20%
- 1,001 to 5,000
20%
- More than 5,000
20%

14. If the company specializes or has deep experience in particular industries, please briefly list the focus areas.

Healthcare; Finance; Compliance.

15. Please list the company's top *association* clients.

America's Health Insurance Plans (AHIP) • Alliance for Continuing Education in the Health Professions (ACEHP) • American College of Chest Physicians (ACCP) • Certified Commercial Investment Member Institute (CCIM) • Association of Nutrition and Foodservice Professionals (ANFP) • Medical Group Management Association (MGMA) • National Association of Home Builders (NAHB) • Nurses Improving Care for Healthsystem Elders (New York University) • World Anti-Doping Agency (WADA) • North American Retail Dealers Association (NARDA) • Credit Union National Association (CUNA) • Girl Scouts (San Jacinto Council) • Children's Hospital of Wisconsin

16. Please list the company's other (non-association) top clients.

BMO Harris Bank • GE Healthcare • McDonald's Corporation • Mars Drinks • J.J. Keller & Associates • University of Wisconsin—Department of Engineering Professional Development Program • Magna Publications • Johnson Controls • Myriad Genetics • WellPoint • Humana • Aetna

17. Provide a URL for more information about the LMS.

<http://www.webcourseworks.com/hosted-software/coursestage-lms>

18. Provide any other information or notes relevant to the "General LMS Information" section.

CourseStage demo/sandbox site access can be made available upon request.

LMS Implementation

1. In *calendar* days, how long do complex, typical, and simple client implementations of the LMS usually take? (Assume a simple implementation means the clients uses the LMS as-is with no integration and no custom programming and a complex implementation involves integration and custom programming. Typical implementations should be based on the company's usual experience with the majority of its clients. Assume the implementation clock starts when the contract is signed and stops when end users begin accessing the LMS.)

Complex

120

Typical

60

Simple

30

2. Briefly describe the implementation process.

To begin, the WCW Project Manager establishes an implementation schedule that complies with the terms of the contract. The project officially begins with the kick-off meeting, in which project goals are set and team members' roles are discussed. After kick-off, project development begins, moving through each of the milestones:

- *Requirements Identification: In this stage, WCW works with the customer to identify how CourseStage's standard features will be configured to suit the customer's unique needs.*
- *Modifications & Integration: The Modifications & Integration stage allows for identification and development of needed*

CourseStage customizations, as well as integration of CourseStage with other systems.

- *Staging Instance: The Staging Instance is a proving ground for the CourseStage implementation. In it, customizations are installed and tested.*
 - *Acceptance Testing: During acceptance testing, a production instance of CourseStage is installed and users are allowed inside to test functionality.*
 - *Training & Launch: The Training & Launch stage is used to familiarize the customer's LMS Administrator with CourseStage before it goes live.*
 - *Evaluation: After the launch of the LMS, an evaluation is conducted to identify any remaining needs during post-development.*
3. Briefly describe the *company* personnel (by role) involved in the LMS implementation. *Account Manager, Project Manager, Information Designer, Systems Architect/Programmer, Graphic Artist, Client Support Representative.*
 4. Please specify the location (by time zone) of company personnel involved in implementation. *-6 UTC*
 5. Briefly describe the *client* personnel (by role) expected to be involved in the LMS implementation.
 - *A Project Manager who is assigned to the LMS implementation project.*
 - *A Chief Information Officer is responsible for overseeing system integration, including association management systems, websites and/or scalability.*
 - *An LMS Administrator, who will control the administrative functions of the CourseStage instance.*
 - *A Content Director (possibly overseeing a team of one or more content creators), who will design the content used in CourseStage courses.*
 6. Provide any other information or notes relevant to the "LMS Implementation" section.

Implementation timelines are dependent upon customizations and integration points requested by the client. Web Courseworks takes a phased approach to each implementation to ensure that clients have ample time to build courses within the site. This staging site is typically available 2-3 weeks following implementation kick-off.

Pricing

We are grateful to participating companies for providing the following information, as pricing in the absence of specific client details can be difficult. Please be aware that the pricing indicated here may not be the actual pricing you receive from a particular company. Actual pricing will vary based on the specifics of your situation, but these numbers offer a benchmark for comparing companies and developing a general idea of how much your LMS implementation may cost.

1. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).
 - 500
\$24,000
 - 2,500
\$38,000
 - 5,000
\$49,750
 - 10,000
\$60,000
 - 25,000
\$100,000
 - Unlimited
Not available
2. For a *company-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical

implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

- 500
\$36,000
- 2,500
\$72,000
- 5,000
\$97,250
- 10,000
\$139,000
- 25,000
\$200,000
- Unlimited
Not available

3. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *for the first year*. Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

- 500
- 2,500
- 5,000
- 10,000
- 25,000
- Unlimited

4. For a *client-hosted* implementation, provide a total pricing estimate in U.S. dollars (USD) for the following number of registered end users *through the third year* (cumulative, including the first-year costs provided in the previous question). Include all costs paid to company for typical implementations of these sizes (i.e., licensing, customization, integration, training, hosting, and any other areas of work).

Not applicable

- 500
- 2,500
- 5,000
- 10,000
- 25,000

- Unlimited
5. Briefly describe the pricing model for the LMS.

Pricing Estimates are calculated using the following criteria & assumptions:

- *CourseStage Implementation (Base System)*
- *One additional module (eCommerce, Self-Assessment, Learning Journal, Live Training, etc.)*
- *Third-party system integration (AMS/ Transcript/etc) for larger implementations*
- *An active user community; enrolled in learning paths and/or accessing multiple courses on a fairly regular basis*
- *Since we do not charge a license fee, WCW subscription pricing includes content hosting, usage, and maintenance.*

We will often work within a client's business model to establish a pricing agreement that meets the needs of that association.

6. Briefly describe the payment schedule.
50% of implementation fee due upon contract signing; 50% of implementation fee due upon system go-live. Subscription fees can be billed quarterly or annually.

7. Briefly describe pricing for additional services.

Custom programming needs will be quoted on a per project basis.

8. Provide any other information or notes relevant to the "Pricing" section.

—

Technology

1. If installation of the LMS on *client* servers is an option, what are the server operating system and database configurations supported?

Not applicable

2. Briefly describe the technical framework and code structure of the LMS.

CourseStage is a Moodle derivative that employs a number of standard modules, as well as other custom extensions. The application runs on a load balanced, fault tolerant cluster of Linux servers running PHP code served by Apache, with a

MySQL backend database. A modular framework is employed to facilitate client requested, customized features.

3. Briefly describe the LMS's ability to share data for the purposes of migration and integration.
Through customization, data can be shared, for purposes of integration or migration, via a SOAP web services API, or a CSV flat file.
4. Briefly describe the scalability of the LMS and its ability to handle heavy loads.
As part of our service level agreement, server performance including processor load, disk & memory usage, and server errors are closely monitored. This system permits easy scalability of design to meet user demand and provide high availability. For example, each year over 70,000 end users receive certification from America's Health Insurance Plans. These concurrent users access the training via the CourseStage platform between June and October.
5. Briefly describe any limits (e.g., storage caps or bandwidth restrictions) clients should know about the LMS and its hosting or technical infrastructure.
There are no caps for storage or bandwidth—additional virtual servers are added as necessary.
6. Provide any other information or notes relevant to the "Technology" section.
—

System Requirements

1. What are the technical requirements for an end user to access the LMS?
Users can access the LMS using any web browser that was made in the last 10 years. JavaScript is highly recommended but not required. JavaScript 1.2+ support would be recommended. CSS 2.0 support is also highly recommended but not required. To use SCORM courses in CourseStage, the requirements are more defined. SCORM requires IE 6+, Firefox 1.0+, Mozilla 1.0+, Opera 7+, Netscape 7+, or Safari 1.2+. JavaScript must be enabled to use SCORM. CourseStage doesn't need a JRE installed. CourseStage also doesn't

have any requirements for computing power, screen resolution, or hard drive space. Those requirements should be determined by what content is being served through CourseStage.

2. What are the technical requirements for an administrator to access the LMS?
Same as above.
3. Is the end-user view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
4. Is the administrator view of the LMS entirely browser-based? If no, specify what is not browser-based.
Yes
5. Provide any other information or notes relevant to the "System Requirements" section.
—

Integration and Interoperability

1. What percentage of client implementations involve at least one integration?
62%
2. Briefly describe the typical types of integration for the LMS.
Single sign-on integration with Association Management System and/ or content management system. Transcript database integration. eCommerce integration. Third-party Webinar or Social Community Platform. Data feed integration.
3. Briefly describe the standard communication protocols used by the LMS to achieve integration and interoperability.
Using standard PHP libraries, our offering can integrate with virtually any software that exposes an API. Integrations may use SOAP web services or flat file exchange.
4. Briefly describe the process used for planning and implementing integration between the LMS and another system.
Each LMS integration is assigned a Software Architect who will guide the project through the following steps: 1) Gather API/Services

documentation for external system. If the integration is with a customer's system, the customer is responsible for exposing required services. If it is a third-party system, the customer is responsible for directing the WCW architect to the appropriate documentation. A System Integration Specialist for the external system will be identified by the customer. 2) After contact with the System Integration Specialist, the WCW Software Architect develops a design strategy for external system integration. 3) The external system provider will make a test environment available. 4) External system integration customizations are implemented and tested by WCW software engineers.

5. With which of the following Webinar systems has the LMS been integrated for a client implementation?
 - Adobe Connect ✓
 - Elluminate ✓
 - Genesys
 - GoToWebinar
 - Microsoft Live Meeting
 - ReadyTalk
 - WebEx ✓
 - Completely custom (non-commercial) Webinar system ✓
 - The LMS has never been integrated with a Webinar system.
 - Other (please specify) ✓
Wimba & CommPartners webinar platforms.
6. With which of the following association management systems (AMSES) has the LMS been integrated for a client implementation?
 - Aptify (Aptify) ✓
 - Association Anywhere (ACGI)
 - ClearVantage (Euclid) ✓
 - CRM for Members (ProTech)
 - iMIS (Advanced Systems International) ✓
 - IRMembership (IRM Systems)
 - Members360 (Affiniscap)
 - netFORUM (Avecetra) ✓
 - Office Manager (internet4associations)
 - Personify (TMA Resources) ✓
 - TIMSS (TMA Resources) ✓

- Wild Apricot (Wild Apricot)
 - Completely custom (non-commercial) AMS
 - The LMS has never been integrated with an AMS.
 - Other (please specify)
7. With which of the following Web content management systems (CMSes) has the LMS been integrated for a client implementation?
 - ACGI CMS Anywhere
 - BrowserCMS
 - DotNetNuke
 - Drupal ✓
 - Ektron
 - Joomla!
 - Microsoft SharePoint Server
 - Results Direct CMSPlus
 - Completely custom (non-commercial) CMS
 - The LMS has never been integrated with a CMS.
 - Other (please specify)
 8. Has the LMS been tested for interoperability with any learning content management systems (LCMSes), whether third-party or proprietary? If yes, please specify which LCMSes.
No
 9. Has the LMS been tested for interoperability with any e-commerce systems, whether third-party or proprietary? If yes, please specify which e-commerce systems.
Yes. Magento & other proprietary third-party systems.
 10. Has the LMS been tested for interoperability with any content authoring tools, whether third-party or proprietary? If yes, please specify which content authoring tools.
Yes. Any authoring tool that publishes SCORM content can be uploaded (includes Articulate Presenter, and other third-party tools).
 11. Has the LMS been tested for interoperability with any assessment (i.e., testing) tools, whether third-party or proprietary? If yes, please specify which assessment tools.
Yes. CourseStage has built-in quiz tools.

12. Has the LMS been tested for interoperability with any evaluation (i.e., survey) tools, whether third-party or proprietary? If yes, please specify which evaluation tools.
Yes. CourseStage has built-in survey tools.
13. Has the LMS been tested for interoperability with any content libraries, whether third-party or proprietary? If yes, please specify which content libraries.
Yes. Credit Union National Association course catalog; Advance Online (AOI); any SCORM-compliant third party library would work.
14. Provide any other information or notes relevant to the “Integration and Interoperability” section.
—

Standards and Guidelines

1. Does the LMS produce content that conforms to guidelines or standards?
- AICC
 - IMS Global Learning Consortium
 - Medbiquitous
 - SCORM 1.1
 - SCORM 1.2
 - SCORM 2004
 - Section 508
 - The LMS does not produce content that conforms to any of these guidelines or standards. ✓
 - Other (please specify)
2. Can the LMS play content that conforms to guidelines or standards?
- AICC
 - IMS Global Learning Consortium
 - Medbiquitous ✓
 - SCORM 1.1 ✓
 - SCORM 1.2 ✓
 - SCORM 2004 ✓
 - The LMS does not play content that conforms to any of these guidelines or standards.
 - Other (please specify)
3. Provide any other information or notes relevant to the “Standards and Guidelines” section.
—

Hosting

1. Is the LMS available as a *company-hosted* solution?
Yes
2. How many LMS installations are hosted by the *company*?
47
3. Is the LMS available as a *client-hosted* solution?
No
4. How many LMS installations are hosted by the *client*?
Not applicable
5. How does the company provide LMS hosting?
- On servers managed directly by the company ✓
 - On servers managed by a partner
 - Not applicable because the company does not host installations of the LMS
 - Other (please specify)
6. If the company’s LMS hosting is provided by a partner or partners, please list the name(s).
Not applicable
7. Briefly describe the company’s preferred or recommended hosting option.
Company-hosted is the only hosting option.
8. If the company provides LMS hosting, briefly describe how application down time (e.g., for routine maintenance) is scheduled and handled.
Application down time or routine maintenance is always scheduled at least two weeks in advance. WCW administrators will notify client administrator and schedule maintenance for a time that will minimize disruption for users.
9. If the company hosts the LMS installation, is a development or testing environment (separate from the live, production environment) provided for the client?
- Yes, routinely as part of standard pricing ✓
 - Yes, when requested for an additional fee
 - No
 - Not applicable because the company does not host LMS installations

Contact WCW
Phone: 555.555.5555 | Email: example@example.com

Logged in as John Doe
Profile | Logout

WCWA

MY COURSES MY PROFILE TRANSCRIPT

My Courses

Show only courses accessed before [dropdown] Go Reset

Incomplete Courses | Complete Courses | All Courses

Course	Expiration	Grade	Cumulative Time	Last Access
Oncologic Imaging Collection	Never	100.00	7d 14h 44m 6s	04/10/12
Imaging Patients with Cardiac Trauma	Never	100.00	2d 14h 1m 16s	04/10/12
Hot Topics in Thoracic Imaging	Never	47.99	0d 14h 44m 6s	01/02/12
Brain Imaging Work-up for Dementia	Never	47.99	3d 14h 12m 6s	04/02/12
Abdominal MRI for Better Diagnosis	Never	50	1d 5h 44m 6s	04/04/12

Health Care Reform
We explain the changes under the health care reform law, to improve health access, and the work that still needs to be done.

Here's to a healthy you in 2012.

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The CourseStage course filter displays a student's current courses, past courses, and all the courses in which they are enrolled.

10. Provide any other information or notes relevant to the "Hosting" section.
-

Personalization

- Can end users specify their preferred time zone (which may differ from the default site time zone) and then see dates and times in the site formatted to that time zone?
Yes
- Can end users specify their preferred language (which may differ from the default site language)?
Yes
- When end users who have specified a preferred language log in, does the site language change dynamically to match their profile?
Yes
- Does the LMS support the ability to recommend courses based on end users' prior activities, profile data, or role in the system?
No
- Does the LMS support the ability to provide custom site content (e.g., the home page) for end users based on their prior activities,

profile data, or role in the system?

Yes

6. Provide any other information or notes relevant to the "Personalization" section.
-

Interface Configuration

- Are the branding and look and feel for the *end-user* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *end-user* view are customized (e.g., handled entirely via cascading style sheets).
Yes. The look and feel for the end-user view of the LMS is completely customizable to reflect a similar image as the organization's existing brand. Themes are built out via CSS.
- Are the branding and look and feel for the *administrator* view of the LMS customizable? If yes, briefly describe how the branding and look and feel for the *administrator* view is customized (e.g., handled entirely via cascading style sheets).
Yes. An administrator may make aesthetic changes to the CourseStage interface at anytime (color, logo, etc.).

The CourseStage student dashboard

Contact CourseStage
Phone: 555.555.5555 | Email: example@example.com

Logged in as John Doe
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CourseStage™

CERTIFICATION PORTAL | REPORTING | TRANSCRIPT

My Learning Plans [Course symbol key](#)

- Independent Agent
- Group Agent
- PDP
 - [AHIP](#)
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 - [Fraud, Waste & Abuse](#)
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 - [Foundation/ Basics](#)
Duis aute inure dolor in reprehenderit in voluptate.
 - [Tools for Compliant Selling](#)
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 - [Sales Event Reporting](#)
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 - [Risk Prevention](#)
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 - [Prescription Drug Coverage](#)
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Health Care Reform

We explain the changes under the health care reform law, to improve health access, and the work that still needs to be done.

Here's to a healthy you in 2012.

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3. Are the navigation options for the *end-user* view of the LMS customizable? If yes, briefly describe how the navigation options for the *end-user* view are customized.

No. Administrators will determine navigation styling when the interface is customized during implementation. A variety of navigation options may be set on the course level.

4. Are the navigation options for the *administrator* view of the LMS customizable? If yes, briefly describe how the navigation options for the *administrator* view are customized.

Yes. Administrators will select preferred site navigation option during implementation.

5. Is the site content (as opposed to course content) for the *end-user* view of the LMS customizable? If yes, briefly describe how the content for the *end-user* view is customized.
- Yes. During the customization process, the client may further customize the end-user dashboard to include a variety of widgets (social media feeds, news & FAQs, discussion forums, recent activity, site summaries, marketing material, calendar of events, etc.).*

6. Is the content for the *administrator* view of the LMS customizable? If yes, briefly describe how the content for the *administrator* view is customized.

Yes. Similar to the end-user dashboard customizations. The administrator dashboard view may also be customized.

7. Provide any other information or notes relevant to the “Interface Configuration” section.

—

Internationalization and Localization

1. Is the on-screen text (instructions, button labels, error messages, etc.) for the *end-user* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

Yes

2. Is the on-screen text (instructions, button labels, error messages, etc.) for the *administrator* view of the LMS centrally located, and can it easily be translated (into a different language) or localized (e.g., if a client wants to replace the use of the term “student” with the term “learner” throughout the site)?

Yes

3. Does the LMS support multibyte, or complex, character sets (e.g., Japanese and Chinese)?

Yes

4. Does the LMS support right-to-left, or bidirectional, languages (e.g., Arabic and Hebrew)?

Yes

5. Can administrators change the default time zone used for formatting dates and times in the LMS?

Yes

6. In how many countries has the LMS been implemented for clients?

2

7. Please list the countries where the LMS has been implemented for a client.

USA; Canada.

8. In how many languages has the LMS been implemented for clients?

3

9. Please list the languages in which the LMS has been implemented for a client.

English, French, Spanish.

10. How many language packs are available for the *end-user* view of the LMS?

54

11. Please list the languages for which a language pack is available for the *end-user* view.

Afrikaans, Albanian, Armenian, Belarusian, Bosnian, Bulgarian, Croatian, Chinese (Simplified), Czech, Danish, Dutch, English, Estonian, Filipino, Finnish, French, Gaelic, German, Greek, Hindi, Hungarian, Icelandic, Indonesian, Italian, Japanese, Korean, Lithuanian, Lao, Latin, Macedonian, Malaysian, Norwegian, Nynorsk, Persian, Polish, Portuguese, Romanian, Russian, Samoan, Sinhala, Serbian (Latin), Slovak, Slovenian, Somali, Spanish (International), Swedish, Tagalog, Tamil, Thai, Turkish, Ukrainian, Vietnamese, Welsh

12. How many language packs are available for the *administrator* view of the LMS?

54

13. Please list the languages for which a language pack is available for the *administrator* view.

Afrikaans, Albanian, Armenian, Belarusian, Bosnian, Bulgarian, Croatian, Chinese (Simplified), Czech, Danish, Dutch, English, Estonian, Filipino, Finnish, French, Gaelic, German, Greek, Hindi, Hungarian, Icelandic, Indonesian, Italian, Japanese, Korean, Lithuanian, Lao, Latin, Macedonian, Malaysian, Norwegian, Nynorsk, Persian, Polish, Portuguese, Romanian, Russian, Samoan, Sinhala, Serbian (Latin), Slovak, Slovenian, Somali, Spanish (International), Swedish, Tagalog, Tamil, Thai, Turkish, Ukrainian, Vietnamese, Welsh.

14. Provide any other information or notes relevant to the “Internationalization and Localization” section.
-

Search and Catalogs

1. How do content catalogs function in the LMS?
 - Administrators can create a single catalog. ✓
 - Administrators can create multiple catalogs. ✓
 - A catalog can contain items other than online courses (e.g., a PDF-based study guide). ✓
 - End users can view and search catalogs before authenticating (logging in). ✓
 - A catalog can be linked with various enrollment options (e.g., an end user viewing a catalog can self-enroll). ✓
 - The LMS does not support catalogs.
 - Other (please specify)
2. What types of search are available to *end users* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for other end users ✓
 - The LMS does not support search by end users.
 - Other (please specify)
3. What types of search are available to *administrators* in the LMS?
 - Search within a single catalog ✓
 - Search across multiple catalogs ✓
 - Search general site content ✓
 - Search within communication and collaboration tools (e.g., discussion boards) ✓
 - Search for end users ✓
 - Search for other administrators ✓

- The LMS does not support search by administrators.
 - Other (please specify)
4. Provide any other information or notes relevant to the “Search and Catalogs” section.
-

Authoring, Managing, and Displaying Learning Content

1. Which types of content can the LMS manage?
 - Self-paced online courses, tutorials, or presentations (excluding recorded Webinars) ✓
 - Facilitated online courses (excluding Webinars) ✓
 - Real-time Webinars ✓
 - Recorded or on-demand Webinars ✓
 - Audio or video podcasts ✓
 - Member-only discussion boards ✓
 - Electronic study guides ✓
 - E-learning programs combined with classroom-based learning (blended learning) ✓
 - Offline formats (e.g., journal articles or classroom-based seminars) with online assessments ✓
 - Educational simulations or games ✓
 - CD-ROM or DVD-based education
 - Third-party “off-the-shelf” courses ✓
 - Other (please specify)
2. By which criteria can online courses be marked completed?
 - The end user views all screens in the course. ✓
 - The end user spends a specified minimum amount of time in the course. ✓
 - The end user achieves a specified minimum score on the assessment(s) associated with the course. ✓
 - An administrator marks the end user’s status in the course completed. ✓
 - Online courses cannot be marked completed in the LMS.
 - Other (please specify)

The left-hand navigation menu allows the user to find learning objects quickly.

3. Does the LMS provide the ability to author learning content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how a typical online course is authored in the LMS (e.g., using a template or wizard or with a what-you-see-is-what-you-get editor).
Clients can import third-party authored media and learning objects into CourseStage, or clients can utilize CourseStage's WYSIWYG editor or html editor to create course pages and online activities.
4. Does the LMS provide an easy, no-coding approach to integrating players for rich media (e.g., streaming audio and video)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how rich media is typically integrated.
The LMS allows administrators to easily embed or link to rich media content. The system will auto-configure the correct player for streaming audio and video.
5. Does the LMS support offline authoring of learning content?
 - Standard
 - Semi-standard
 - Completely custom
 - Third-party ✓
 - Unavailable
 - If yes, briefly describe how the LMS supports offline authoring.
6. Which workflow tools does the LMS provide to help manage the creation, review, revision, and publishing of learning content in a group-based development process? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Check in/ check out functionality
Third-party
 - Ability to review content before it is published
Third-party
 - Ability to assign tasks to administrators
Third-party
 - Ability to monitor progress on tasks
Third-party
 - Ability to add internal comments (viewable only by other administrators) to content
Third-party
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

7. Does the LMS provide for versioning of learning objects and maintain archival versions?
 - Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
8. Can the LMS generate printer-friendly content?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
 - If yes, briefly describe how the printer-friendly option functions.
—
9. Does the LMS provide any digital rights management tools (i.e., ways to protect content in the system from unauthorized viewing and use)?
 - Standard
 - Semi-standard
 - Completely custom ✓
 - Third-party
 - Unavailable
 - If yes, briefly describe how the digital rights management functions.
10. Does the LMS provide automated navigation in online courses (e.g., Next and Back buttons are coded automatically)?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
11. In which formats and file types can the LMS authoring tools distribute and publish final learning content?
 - Browser-delivered online content ✓
 - Downloadable version
 - CD or DVD
 - HTML ✓
 - SWF
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
 - PDF
 - Other (please specify)
12. Does the LMS provide import options to automatically repurpose *Microsoft Word* content into learning objects in the system?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
13. Does the LMS provide import options to automatically repurpose *Microsoft PowerPoint* content into learning objects in the system?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
14. Does the LMS give administrators the ability to tag learning objects with metadata (e.g., keywords describing the content or purpose of the piece)?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
15. Does the LMS provide administrators with a searchable central repository where learning objects (pieces of content) can be stored for reuse?
 - Standard
 - Semi-standard ✓
 - Completely custom ✓
 - Third-party
 - Unavailable
16. Does the LMS give administrators the ability to apply different branding (look and feel) to different online courses?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable

17. Does the LMS give administrators the ability to use content in multiple courses with different brandings (look and feels) without having to reauthor the content (i.e., are content and presentation separated)?
 - Standard
 - Semi-standard ✓
 - Completely custom
 - Third-party
 - Unavailable
18. Does the LMS provide the ability to make a document library available to users?
 - Standard ✓
 - Semi-standard
 - Completely custom
 - Third-party
 - Unavailable
19. Briefly describe the company's preferred or recommended authoring tool (which may or may not be the company's own tool).
Web Courseworks offers a web-based, collaborative authoring tool called CourseCreate, which produces SCORM-compliant Flash or HTML courses, interactive learning objects or assessments.
20. Provide any other information or notes relevant to the "Authoring, Managing, and Displaying Learning Content" section.
 —

In-person, Place-based Courses

1. Which management options does the LMS provide for in-person, place-based courses? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Administrative calendar for courses
Standard
 - End user calendar for viewing course options and schedules
Standard
 - Waitlisting
Standard
 2. Is the LMS used by any clients to manage in-person conferences (i.e., events that involve multiple sessions by multiple presenters)? If yes, briefly describe how the LMS is used to manage conferences.
No
 3. Provide any other information or notes relevant to the "In-person, Place-based Courses" section.
Classroom-based seminars and courses can be tracked in the CE module using the "face-to-face" attendance module. Administrators create a session in the LMS, with the appropriate credits assigned to it, and can set the attendance status for each user. Administrators or instructors can take attendance and give credit for live events through CourseStage.
- Personnel management (for scheduling instructors and facilitators)
Semi-standard
 - Facility management (for scheduling rooms)
Semi-standard
 - Equipment and resource management (for scheduling use of projectors, flip charts, etc.)
Semi-standard
 - Automatic e-mail messaging and notification to end users
Standard
 - Automatic e-mail message and notification to administrators
Standard
 - Customizable e-mail messages and notifications to users
Semi-standard
 - Customizable e-mail messages and notifications to administrators
Semi-standard

Webinars

1. Does the LMS provide integrated Webinar functionality?

- Standard
- Semi-standard ✓
- Completely custom
- Third-party
- Unavailable
- If yes, briefly describe the integration between the LMS and the Webinar software (e.g., single sign-on).

CourseStage has successfully integrated with multiple Webinar providers supporting a seamless end-user experience. WebEx, Adobe Connect Pro, and Wimba have been integrated for single sign-on, launch tracking and completion verification.

2. Briefly describe the company's preferred or recommended Webinar software.

Web Courseworks partners with CommPartners, LLC, the leading provider of event production and webinars for the association and non-profit sector. CommPartners' client list includes the American Medical Association, Americans for the Arts and National Association of Social Workers. CommPartners provides multiple levels of webinar support depending on the needs of each client. CommPartners offers three distinct levels of support for webinar clients, based on the goals of the client's online programming and the unique needs of the organization and audience. They offer an "Event Producer" program (which provides unlimited support from an Event manager), "Event Assistant" program (moderate support), and independent "Self Managed" program.

3. Provide any other information or notes relevant to the "Webinars" section.

—

Registration

1. How can end users be registered in the LMS?

- By self-registration ✓
- By registration code or key ✓

- By an administrator registering end users one by one ✓
- By an administrator performing a bulk upload ✓
- As the result of an e-commerce purchase ✓
- By self-registration with administrator approval ✓
- Other (please specify)

2. Can an administrator easily (e.g., by clicking a button) configure which of these registration options are available in the site?

Yes

3. Does the LMS provide secure authentication for end users with a valid log-in and password?

Yes

4. Does the LMS provide self-serve password recovery help for end users?

Yes

5. Can administrators define new *end-user* roles with distinct rights and access in the site?

Yes

6. Can administrators define new *administrator* roles with distinct rights and access in the site?

Yes

7. Can the fields for end user profiles be added, edited, and deleted?

Yes

8. Is the content of profile fields updatable by end users if allowed by administrator?

Yes

9. Can individual end users specify which of their profile data is viewable by other end users (e.g., can one end user choose to make her e-mail visible in her profile while another end user hides her e-mail)?

Yes

10. Provide any other information or notes relevant to the "Registration" section.

—

Enrollment

- How can end users be enrolled in courses in the LMS?
 - By self-enrollment ✓
 - By enrollment code or key ✓
 - By an administrator enrolling end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - As the result of an e-commerce purchase ✓
 - By self-enrollment with administrator approval ✓
 - Other (please specify) ✓

Admin enrollment of groups of users/batches.

- Can an administrator easily (e.g., by clicking a button) configure which of these enrollment options are available in the site?

Yes
- How administrators configure enrollment options?
 - Sitewide ✓

- At the catalog level
 - By course group ✓
 - On a course-by-course basis ✓
 - On an end user-by-end user basis ✓
 - Other (please specify)
- Can enrollments occur based on end user-specific criteria?
 - The end user's role in the system ✓
 - The end user's score on an assessment ✓
 - The end user's completion of prerequisites for a particular course ✓
 - The LMS does not support enrollment based on end user-specific criteria.
 - Other (please specify)
 - Does the LMS support the ability to enroll end users in bundles, series, or groups of related courses in one click (versus enrolling separately in each individual course)?

Yes
 - Provide any other information or notes relevant to the "Enrollment" section.

—

Contact CourseStage
Email: Administrator@mpitime.com

You are logged in as Andrea Hansen
Profile | Logout

CourseStage™

CourseStage Home Transcript

Andrea Hansen

Profile Edit profile Blog Activity reports Learning Journal Transcript

Name	Start	Complete	Duration	Status	Score	Credits	Delivery method	Certificate
ASMC Annual Event Session 1	March 31, 2011	--	01h 05m 57s	🟡	--	--	--	--
CoachTrue for Elite Coaches	April 7, 2011	--	03h 52m 34s	🟡	--	--	--	--
CommPartners' Services	March 29, 2011	May 4, 2011	19m 01s	✅	0.00	1.00 CME	🖥️	📄
CommPartners' Services	May 4, 2011	--	09m 05s	🟡	--	--	🖥️	--
FI Certification	--	May 23, 2012	04h 19m 20s	❌	--	--	--	--
McDonald's Hiring Process	March 31, 2011	March 31, 2011	01m 23s	✅	P	2.00 CEU	🖥️	📄
Medical Care Certification	March 29, 2011	June 27, 2012	03h 18m 48s	✅	--	1.00 CME	--	📄
Medical Certification Test	January 5, 2012	January 5, 2012	26m 35s	❌	26.43	--	🖥️	--
Time Management 101	March 31, 2011	--	14s	🟡	--	--	--	--
Workshop Presentation	April 15, 2011	July 5, 2011	15m 17s	✅	100.00	4.00 CEU	👥	📄
						12h 32m 18s	2.00 CME 6.00 CEU	

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Student view of a transcript

Managing Continuing Education and Certification

1. Does the LMS support *simple* credit scenarios? That is, can an administrator assign, to a single course, a single credit value (e.g., one continuing education unit, or CEU), which is awarded automatically to end users on successful completion of the course?
Yes
2. Does the LMS support *complex* credit scenarios? That is, can an administrator assign, to a single course, multiple credit values (e.g., multiple credit types or different credit amounts based on the end user's state of practice), and the appropriate credit type and amount is awarded automatically to end users on successful completion of the course?
Yes
3. To what types of learning content can credit be assigned?
 - Content delivered by the system (e.g., an online course that users access through the LMS) ✓
 - Content the system has prior knowledge of but does not deliver (e.g., an in-person, classroom-based course managed by the LMS) ✓
 - Content the system does not have prior knowledge of and does not deliver (e.g., an article that an individual user read to satisfy a continuing education requirement)
 - The LMS does not allow credit to be assigned to learning content.
 - Other (please specify)
4. How can end users receive credit for *content delivered by the system* (e.g., an online course that users access through the LMS)?
 - Automatically upon end user completion of the content ✓
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
- By an administrator performing a bulk upload ✓
- By the end user claiming the credit and an administrator approving the claim
- The LMS does not support credit for this type of learning content.
- Other (please specify)
5. How can end users receive credit for *content the system has prior knowledge of but does not deliver* (e.g., an in-person, classroom-based course managed by the LMS)?
 - By the end user claiming the credit ✓
 - By an administrator awarding the credit to end users one by one ✓
 - By an administrator performing a bulk upload ✓
 - By the end user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content.
 - Other (please specify)
6. How can end users receive credit for *content the system does not have prior knowledge of and does not deliver* (e.g., an article that an individual user read to satisfy a continuing education requirement)?
 - By the user claiming the credit
 - By the user claiming the credit and an administrator approving the claim
 - The LMS does not support credit for this type of learning content. ✓
 - Other (please specify)
7. Can the LMS automatically make certificates available for printing by end users once they complete the learning content or credit is awarded?
Yes
8. Can the certificates to be printed by end users be customized (e.g., the client define a logo and look and feel for the certificates)?
 - Yes, on a sitewide basis ✓
 - Yes, on a course-by-course basis ✓
 - No
 - Other (please specify)

9. Does the LMS help *end users* track their own continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends users e-mail messages or notifications about upcoming certification deadlines)
 - Yes, on a self-serve basis (e.g., the end user's transcript indicates remaining continuing education units needed by a recertification deadline) ✓
 - No
 - Other (please specify)
10. Does the LMS help *administrators* track end users' continuing education or certification requirements?
- Yes, automatically (e.g., the LMS sends administrators e-mail messages or notifications about upcoming certification deadlines for affected end users)
 - Yes, on a self-serve basis (e.g., the administrator can run a report to identify end users in danger of or who have already missed a certification deadline) ✓
 - No
 - Other (please specify)
11. Does the LMS maintain end user transcripts (performance, credit awarded, etc.)?
Yes
12. Can end users view and print their own transcripts?
Yes
13. Does the LMS provide functionality for end users to build their own online learning or professional portfolio? A portfolio allows end users to track their learning or professional activities and accomplishments—for example, credit (like continuing education units, or CEUs) earned, presentations delivered, articles published, research projects undertaken, professional affiliations, resume, etc. If yes, briefly describe the LMS's portfolio functionality.
No. Learning journal functionality allows learners to record other professional activities or

accomplishments. It does not currently function to track credits earned or allow upload of portfolio items like articles or presentations.

14. How many clients use the LMS to manage continuing education or certification?
20
15. What types of continuing education or certification do clients use the LMS to manage?
- Continuing education units (CE or CEU) ✓
 - Continuing medical education (CME) ✓
 - Continuing legal education (CLE)
 - Continuing professional education (CPE)
 - Certificate of successful completion ✓
 - Credit towards completing or maintaining a certification, licensure, or other credential ✓
 - Credit towards a degree at a college or university
 - No clients are using the LMS to manage continuing education or certification.
 - Other (please specify)
16. Provide any other information or notes relevant to the "Managing Continuing Education and Certification" section.
—

Assessments

1. Does the LMS provide the ability to create and deploy assessments (tests, quizzes, and examinations)?
Yes
2. How does the LMS allow assessments to be used?
- Ability to offer an assessment as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an assessment with an online course ✓
 - Ability to associate multiple assessments with a single online course ✓
 - Other (please specify) ✓
- Exam Proctoring system: Set quiz password, collect information from proctor.*

3. Does the LMS provide the ability to set pass and fail percentages on an assessment-by-assessment basis (i.e., for one assessment the pass rate may be set at 100%, while another make only require users achieve a 70% to pass)?

Yes

4. Does the LMS provide the ability to display to end users their answer and the correct answer for each question in an assessment?
- Yes, after an end user submits her answer to each question ✓
 - Yes, after an end user completes the entire assessment ✓
 - Yes, after an administrator makes the answers available (e.g., after the due date for completing the assessment) ✓
 - No
 - Other (please specify)
5. How does the LMS provide for automatic feedback for assessments?
- Per question ✓

- Based on whether the end user answered the questions correctly ✓
- Per distracter, or answer option ✓
- Based on which distracter the end user selected ✓
- Per assessment ✓
- Based on the end user's overall performance on the assessment ✓
- The LMS does not provide for automatic feedback for assessments.
- Other (please specify)

6. Can the LMS automatically display a summary screen to show the end user her assessment score?

Yes

7. Does the LMS provide the ability to let end users compare their performance on an assessment to the aggregate score of others?

Yes

8. Does the LMS automatically link assessment data to the performance reports available in the system?

Yes

CourseStage self-assessment results report for learners



ALLIANCE FOR CONTINUING EDUCATION
IN THE HEALTH PROFESSIONS
CALLS - Competencies 6 & 7

Learning Center

- Introduction
- Facilitating Your Learning
- Linking Prep Course to Your Work
- Starting Your Learning Journey
- Self-Assessment**
- Self-Assessment Evaluation
- Thank You

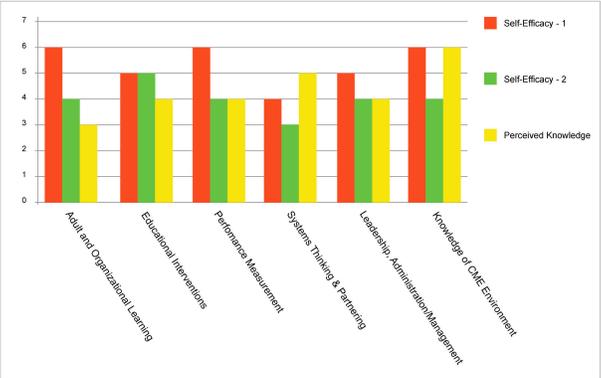
Self-Efficacy - Part I
Self-Efficacy - Part II
Needs Assessment Questions & Comparisons
Results Summary
Results - Graph
Print

Results - Graph

Here is a bar graph comparing your ratings for each part of the self-efficacy and the needs assessment.

[Click here to download tips for reading the results of your assessment exercise.](#)

■ Self-Efficacy - 1
■ Self-Efficacy - 2
■ Perceived Knowledge



Learning Journal



View Entries
Add Entry

Click here to download the Needs Assessment Case and Questions.



Click here to access the forum for this course

Back
Step 1 of 1
Next

Logged in as John Doe (Logout)

9. Does the LMS provide the ability to automatically refer end users to particular content in the system based on their performance on particular questions (e.g., because an end user answers a question incorrectly, a particular online course (or portion of a course) is recommended)?
Yes
10. Does the LMS provide the ability to specify the number of times an end user may complete the assessment?
Yes
11. Can the LMS require end users who initially fail to retake an assessment?
- Yes, end users can be required to retake the entire assessment. ✓
 - Yes, end users can be required to retake only the questions they previously answered incorrectly.
 - The LMS cannot require end users who initially fail to retake an assessment.
 - Other (please specify) ✓
LMS can designate number of times that the user can retake the assessment.
12. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
13. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
14. Does the LMS allow administrators to copy existing assessments (to speed the development of similar assessments)?
Yes
15. Does the LMS provide for automatic randomization of assessments?
- By randomizing which questions are included in the assessment ✓
 - By randomizing the order in which questions are presented ✓
 - By randomizing the order in which distracters, or answer options, are presented ✓
- The LMS does not provide for automatic randomization of assessments.
 - Other (please specify)
16. Does the LMS provide for time limits for assessments?
- For end users to answer a specific question in an assessment within a certain amount of time (e.g., 2 minutes)
 - For end users to complete an entire assessment within a certain amount of time from the start of the assessment (e.g., 20 minutes) ✓
 - For end users to complete an entire assessment by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire assessment by a specified date from a trigger event (e.g., 30 days from when the end user is assigned the assessment) ✓
 - The LMS does not provide for time limits for assessments.
 - Other (please specify)
17. Which types of questions does the LMS make available for use in assessments?
- Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - True/false or yes/no questions ✓
 - Text field ✓
 - Fill-in-the-blank questions (where users type answers in fields in the questions) ✓
 - Matching questions ✓
 - Sequence questions (e.g., users are asked to put the steps of a process in the correct order) ✓
 - Hotspot questions (where users must select the correct area of a graphic)
 - Drag-and-drop questions
 - Other (please specify)
18. Provide any other information or notes relevant to the “Assessments” section.
—

Evaluations

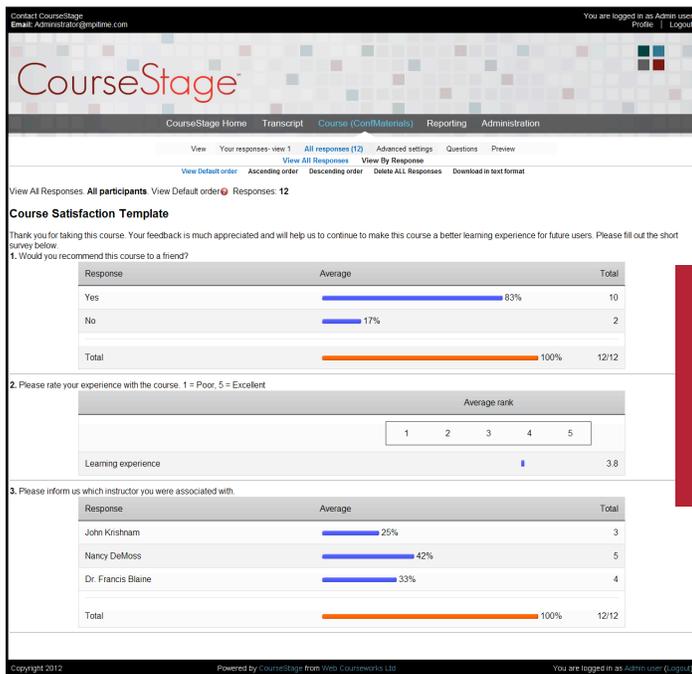
1. Does the LMS provide the ability to create and deploy evaluations (surveys)?
Yes
2. How does the LMS allow evaluations to be used?
 - Ability to offer an evaluation as a standalone item (i.e., not associated with an online course) ✓
 - Ability to associate an evaluation with an online course ✓
 - Ability to associate multiple evaluations with a single online course ✓
 - Other (please specify)
3. Does the LMS automatically link evaluation data to the reports available in the system?
Yes
4. Does the LMS provide the ability to offer evaluations to unregistered and registered end users?
No
5. Does the LMS provide the ability to specify the number of times an end user may complete the evaluation?
Yes
6. Does the LMS allow administrators to create question pools (for categorization or organization purposes)?
Yes
7. Does the LMS allow administrators to create question banks (for reuse purposes)?
Yes
8. Does the LMS allow administrators to copy existing evaluations (to speed the development of similar evaluations)?
Yes
9. Does the LMS provide for time limits for evaluations?
 - For end users to complete an entire evaluation by a specified date (e.g., December 31, 2013) ✓
 - For end users to complete an entire evaluation by a specified date from a

- trigger event (e.g., 30 days from when the end user completes the online course with which the evaluation is associated) ✓
 - The LMS does not provide for time limits for evaluations.
 - Other (please specify)
10. Which types of questions does the LMS make available for use in evaluations?
 - Multiple-choice questions (single answer) ✓
 - Multiple-select questions (multiple answers) ✓
 - Matrix of choices (single answer per row) ✓
 - Matrix of choices (multiple answers per row)
 - Rating scale (e.g., Likert scales) ✓
 - Text box (single field) ✓
 - Text boxes (multiple fields)
 - Number fields
 - Date fields ✓
 - Time fields
 - Demographic information
 - Other (please specify) ✓
 11. Provide any other information or notes relevant to the “Evaluations” section.
—

Essay

Reporting

1. Does the LMS automatically record the date, time, and duration of end users’ access to online courses?
Yes
2. Does the LMS record question-by-question assessment data (versus only a summary score) for end users?
Yes
3. Does the LMS provide item analysis data for assessments (i.e., make it clear which questions end users answered incorrectly most frequently)?
Yes



Administrator view of course evaluation results

4. How does the LMS provide reports?
 - Provides a set of standard, pre-configured reports ✓
 - Provides a built-in tool for creating ad-hoc reports
 - Allows use of standard tools (e.g., Crystal Reports) for creating ad-hoc reports and customizing existing reports
 - Allows administrators to create and report on new (versus pre-configured, system-defined) fields that might be added to collect additional information in end users' profiles or store additional metadata on courses) ✓
 - Other (please specify) ✓
We can make custom reports available on an as needed basis as optional feature.
5. How are the LMS reports made available?
 - View report data online in browser ✓
 - Export report data in an analyzable, manipulable format (e.g., CSV, XLS, or tab-delimited form) ✓
 - Ability to export report data in a nicely formatted format (e.g., PDF or HTML) ✓
 - Other (please specify)
6. How many standard, pre-configured reports are available in the LMS?
12
7. List and briefly describe the standard, pre-configured reports available in the LMS.
 - *Continuing Education transcript— The training transcript can be viewed at an individual or a site-wide level. Information is displayed as a list of courses by user and can be filtered by user role, designated groups, date, course, and other client-indicated fields. The report includes:*
 - ▶ *Course name*
 - ▶ *Start date*
 - ▶ *Completion date*
 - ▶ *Attendance duration*
 - ▶ *Status*
 - ▶ *Score*
 - ▶ *Credits received*
 - ▶ *Delivery method of course*
 - ▶ *Certification/ Certificate*
 - *Course Grade book - The grade book can display information about all users and their scores in each module. It can also display a particular user's overview of all his or her enrolled courses and detailed information for that user on the course level.*
 - *Module reporting - Each scored module in a course will report specific information about student activity in the module for the course. These include:*

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Email: Administrator@mpitime.com

CourseStage™

CourseStage Home Transcript **Course (CertQuiz)** Reporting Administration

Choose an action ...

Grader report

Medical Certification Test

First name / Last name ↑	Time	Pre-Workshop Assessment ↓	Attendance ↓	Pre-Test Evaluation ↓	Sample ↓	Course total ↓
Ellen Chauncey	00s	77.00	75.00	85.00	88.00	76.00
Jon D. Aleckson	01min 55s	100.00	100.00	100.00	100.00	100.00
Timothy Fairway	51s	100.00	100.00	100.00	100.00	100.00
Aileen Faudree	07m 52s	-	0.00	-	-	0.00
David Gamut	07s	-	50.00	-	-	50.00
Andrea Hansen	26m 35s	3.70	-	67.00	-	26.43
William Koffel	01m 25s	12.50	100.00	100.00	21.06	98.68
Matt Meisberger	33s	100.00	100.00	100.00	80.00	100.00
Overall average		7.90	52.50	92.00	-	68.30

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Administrator view of student grades of a single course

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CourseStage™

CourseStage Transcript **Reporting** Administration

Blocks editing on

Site Administration

- Notifications
- Users
- Hierarchy
- Courses
- Grades
- Location
- Language
- Modules
- Security
- Appearance
- Front Page
- Server
- Networking
- V Reports
 - Backups
 - Course overview
 - Logs
 - Live logs
 - Question
 - Security overview
 - Spam cleaner
 - Statistics
 - Unit tests
 - Event report
 - Training transcript**
 - Usage Report
- Miscellaneous
- Transcript
- Custom Reports

Filters

Show only records belonging to: [Remove filter](#)

Add new filter... [Apply filter changes](#) [Clear](#) [Save filter](#)

Statuses on this page

Not attempted	In progress	Failed	Passed	Total
5	14	10	6	35

Results

Export results as...

Campus Safety 101

Exportable as...

User	Start	Complete	Duration	Status	Score	Credits	Delivery method	Certificate
Jon D. Aleckson	February 26, 2010	March 31, 2010	01h 58m 55s		95.00 %	2.50 CME		
PRA Demo	August 12, 2010	--	12m 34s		--	--		
Ned Dennis	September 9, 2009	--	20m 35s		--	--		
Paul Dombey	September 9, 2009	September 9, 2009	05m 44s		85.00 %	2.50 CME		
Fortune Emerson	September 9, 2009	September 9, 2009	01h 09m 53s		57.00 %	--		
Timothy Fairway	September 9, 2009	September 9, 2009	43m 15s		90.00 %	2.50 CME		
May Fielding	September 9, 2009	September 9, 2009	41m 57s		53.50 %	--		
David Gamut	September 9, 2009	March 31, 2010	37s		10.00 %	--		
Edith Granger	September 9, 2009	September 9, 2009	01h 47m 24s		87.70 %	2.50 CME		
Emily Hammond	June 14, 2010	--	49s		--	--		
Andrea Hansen	March 29, 2011	January 5, 2012	02h 16m 04s		1.50 %	--		
Abbey Potterson	July 29, 2009	October 28, 2009	06m 50s		21.80 %	--		
Karissa Schuchardt	June 7, 2011	--	--		--	--		
Tom Smith	March 29, 2011	--	31s		--	--		
ACME Student	March 10, 2010	March 31, 2010	37m 50s		10.00 %	--		
LMS Student	February 15, 2011	February 16, 2011	43m 30s		9.10 %	--		

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Administrator view of site-level transcript, filtered by course results

- ▶ *Quiz - The system displays attempts for every user and includes information about attempt start time, end time and grade. This can be exported in an .ods, Excel, or .csv format. We can also display a bar graph showing the number of students who scored in certain ranges and an item analysis with a breakdown for each quiz question (such as how many students answered the question in a particular way).*
 - ▶ *Attendance - The system lists attendance records for users for past weeks or months.*
 - ▶ *Questionnaire - Questionnaires can be viewed by course, by response or as a list of all questionnaires.*
 - ▶ *SCORM - The system can display a list of users and their attempts with the start time, last access and score.*
 - *Recent Activity block - This can display recent activity in the course such as modules being updated or attempted. This block can be added to the course view page. It also shows recent forum posts.*
 - *Logs - Activity logs in the system can be displayed at the site, course, or module level. The logs can be filtered to a specific user or viewed for all users in a course, site or module. The system can show all activity in the system or can be narrowed to show certain actions (such as view, add, update, delete, changes). It can be further filtered by dates. These logs can be downloaded if desired. The system can also display inactivity reports.*
8. Briefly describe the process for creating ad-hoc reports in the LMS.
Not applicable
9. How many custom reports does the company typically develop for a client implementation of the LMS?
0
10. Briefly describe the type of custom reports most typically developed for client

implementations of the LMS.

Custom reports can be generated based on client-indicated user data fields.

11. Provide any other information or notes relevant to the “Reporting” section.
—

Support for Multiple Sites

1. How does the LMS provide for multiple sites (e.g., for a client’s different chapters, departments, or programs) from a single implementation?
- The LMS does not provide for multiple sites from a single client implementation.
 - Each site in a single client implementation can have its own look and feel (e.g., the logo and color palette may differ from site to site). ✓
 - Each site in a single client implementation can have its own features and functionalities (e.g., one site may use discussion boards while another does not). ✓
 - Each site in a single client implementation can have its own configuration of options (e.g., one site may allow users to self-register while another requires administrators to create user accounts). ✓
 - Each site in a single client implementation can display in its own language (e.g., the default language for one site may be English while another uses Spanish). ✓
 - Each site in a single client implementation can draw from the same master list of courses (to avoid the need to recreate them in each site). ✓
 - Each site in a single client implementation can have its own set of customized reports. ✓
 - Other (please specify)
2. How many clients have a multiple-site implementation of the LMS?

3

3. On average, how many sites are part of a client's multiple-site implementation of the LMS?

8

4. Provide any other information or notes relevant to the "Support for Multiple Sites" section.

Multiple site implementations range from 2 to over 4000 sites.

Collaboration and Communication Tools

1. Which messaging tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- End user-to-end user e-mail
Standard
- End user-to-administrator e-mail
Standard
- Administrator-to-end user e-mail
Standard
- Broadcast messaging to all end users
Standard
- Broadcast messaging to select end users based on criteria (e.g., end users enrolled in a specific course)
Standard
- Instant messaging (one-on-one)
Standard
- Live chats (for multiple end users)
Completely custom
- Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)

2. Which communication and collaboration tools are available in the LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.

- Ability to organize end users in groups for collaborative work
Standard
- Ability for end users to create and store notes or comments on learning content

for their own use

Standard

- Discussion boards
Standard
 - Moderated discussion boards (e.g., an administrator reviews end user-submitted messages before they are viewable by other end users)
Standard
 - Live voice-over-IP
Standard
 - Virtual whiteboard
Completely custom
 - Virtual presentations (e.g., PowerPoint-driven)
Semi-standard
 - Screencasting
Semi-standard
 - Application-sharing
Semi-standard
 - Ability to associate a wiki with a course
Standard
 - Single-point Web camera capability
Standard
 - Multiple-point Web camera capability
Third-party
 - Networking (e.g., ability for end users to connect with one another)
Standard
 - Ability for each registered end user to have a blog
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
3. Does the LMS integrate with any virtual worlds (e.g., Second Life)? If yes, please list the virtual world(s), and briefly describe the integration.
Yes. We can integrate with Second Life via a 3rd party, and it would be a custom integration.
 4. Provide any other information or notes relevant to the "Collaboration and Communication" section.

—

E-commerce

1. Which types of e-commerce transactions are available through your LMS? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Provides for secure transactions (e.g., via SSL)
Standard
 - Handles transactions for online courses
Standard
 - Handles transactions for other online items (e.g., PDF study guides)
Standard
 - Handles transactions for physical items (e.g., books or CDs)
Standard
 - Automatically handles payment by credit card (no manual intervention needed)
Standard
 - Handles payment by check (manual intervention needed)
Standard
 - Handles payment by invoice (manual intervention needed)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. How are taxes, fulfillment, and customer communication handled by the e-commerce system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Handles sales tax, including variations based on the state or region
Standard
 - Automatic and immediate fulfillment for credit card purchases of online items (e.g., a user purchasing access to an online course is automatically enrolled in the course at the time of purchase)
Standard
 - Multiple shipping options can be configured for physical goods
Standard
3. How are product bundling and discounts options handled by the system? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Customizable e-mail message to users making the purchase
Standard
 - Automatic e-mail message on purchase to administrators
Standard
 - Customizable e-mail message to administrators
Standard
 - Automatically maintains order status that can be checked by end user
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
4. Which payment gateways are supported by the e-commerce system?
 - Handles the purchase of bundles, or groups, of related courses by a single end user for her own use
Standard
 - Handles bulk purchases (e.g., a manager wants to purchase access to an online course for 20 of her staff)
Standard
 - Handles discounts (e.g., by accepting discount codes)
Standard
 - Handles different pricing for the same item (e.g., member and nonmember pricing)
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
5. Which payment gateways are supported by the e-commerce system?
 - 2Checkout
 - Authorize.Net ✓
 - BluePay
 - CCAvenue
 - CyberSource ✓
 - EBS

- EWay
 - FastCharge
 - goMerchant
 - iBill
 - LinkPoint
 - Moneris
 - MoneyBookers
 - Pay-Me-Now
 - PayPal Payflow ✓
 - PayPal Website Payments ✓
 - Protx
 - QuickBooks Merchant Services
 - StormPay
 - WorldPay
 - Other (please specify)
5. Does the e-commerce system comply with the Payment Card Industry Data Security Standard (PCI DSS)? If you wish, comment on PCI DSS compliance.

Yes. The CourseStage LMS eCommerce module is PCI Type 4 compliant. We integrate the storefront with our client's payment gateway for credit card processing. As such, we do not directly store any users' credit card information on our servers, and use an authorized Payment Gateway to do all credit card processing. Our eCommerce storefront is scanned quarterly by SecurityMetrics to ensure continued PCI compliance.

6. Briefly describe the company's preferred or recommended e-commerce system (which may or may not be the company's own system) and how integration between the LMS and e-commerce system typically works.
- Preferred eCommerce system is our own eCommerce module based on the Magento system. An off the shelf 3rd party system can be supported via customization.*
7. Is the recommended or preferred e-commerce solution suitable for a commercial site where content is sold directly to individual end users?
- Yes*
8. Provide any other information or notes relevant to the "E-commerce" section.

The CourseStage PCI-compliant eCommerce module offers association clients numerous pricing options to generate non-dues revenue. The eCommerce module:

- *Allows administrators to set prices per course*
- *Connects with credit card payment gateways to process online payment*
- *Restrict enrollment to paid users*
- *Use of membership discounts*
- *Ability to cross-sell and cross-market products*

The typical user experience will be:

- *Users view the course catalog*
- *Select their course(s) for purchase*
- *Proceed to shopping cart*
- *Enter payment information*
- *Proceed to the course in the LMS or exit the receipt page*
- *The course will appear upon their next login to the LMS*

Members and non-members can purchase the appropriately priced course after registering in the system. Discount codes can be applied, as mentioned above, and client training coordinators can purchase bulk enrollment codes for distribution. Administrator dashboards provide an assortment of live sales reports, including revenue generated, most popular products, new customers and orders, and top search terms.

Support and Training

1. Which support options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
- Live telephone support for end users
Semi-standard
 - Live telephone support for administrators
Standard
 - E-mail support for end users
Standard
 - E-mail support for administrators
Standard
 - Self-serve, searchable knowledge base for end users
Standard

Dashboard | Sales | Catalog | Customers | Promotions | Newsletter | CMS | Reports | System

Dashboard

Lifetime Sales

\$2,451.77

Average Orders

\$204.31

Last 5 Orders

Customer	Items	Grand Total
Aileen Faudree	1	\$0.00
Aileen Faudree	1	\$0.00
Admin User	1	\$99.00
Admin User	1	\$69.99
Aileen Faudree	1	\$99.00

Last 5 Search Terms

Search Term	Results	Number of Uses
a	4	1
webinar	0	1
sales	1	2

Top 5 Search Terms

Search Term	Results	Number of Uses
sales	1	2
a	4	1
webinar	0	1

Orders | Amounts

Revenue \$2,451.77 **Tax \$0.00** **Shipping \$0.00** **Quantity 15**

Bestsellers | Most Viewed Products | New Customers | Customers

Product Name	Price	Number of Views
Medical Certification Test	\$99.00	54
Annual Conference Materials	\$49.99	18
Sales Training Scenarios	\$0.00	7
Strategic Performance Indicators: 2010 Fd	\$177.99	7

E-commerce administrative reports display aggregated sales information

AP Alliance for Continuing Education in the Health Professions

Learning Center

Welcome to the CALLS Catalog

My Courses | My Account | My Wishlist | My Cart | Checkout | Log In

Search entire store here... **Search**

Learning Plans

Home Page

6 Item(s) Show: 10 per page

View as: Grid List Sort By: Position

CCMEP Exam Prep Learning Track

\$699.00 **Add to Cart**

Members would pay only **\$499.00**.

The CCMEP™ Exam Prep Course is designed to help you prepare for the CCMEP™ Exam. The content matches the CCMEP™ Exam Blueprint and is based on the Alliance's Competency Areas. [Learn More](#)

[Add to Wishlist](#) | [Add to Compare](#)

Proficiency in CME Learning Track

\$699.00 **Add to Cart**

Members would pay only **\$499.00**.

The Proficiency in CME learning track is designed to help you assess, develop, and/or reinforce your abilities to skillfully use the core CME knowledge and skill sets, as represented in the Alliance's Competency Areas. [Learn More](#)

[Add to Wishlist](#) | [Add to Compare](#)

CCMEP Exam Prep Questions

\$99.00 **Add to Cart**

This course contains 51 multiple choice questions that are designed to emulate the kinds of questions you will experience on the CCMEP™ exam. [Learn More](#)

[Add to Wishlist](#) | [Add to Compare](#)

Applying Adult Learning Principles in CPD

\$99.00 **Add to Cart**

Members would pay only **\$49.00**.

This module explores adult learning principles to help you in your role of supporting healthcare professionals' learning and change - including healthcare professionals of all kinds - from nurses and physicians assistants, to physicians and pharmacists. You will have the opportunity to study key concepts in Adult Learning and theories of learning and change (including Reflection, Experience, and Learning Styles). You will also explore current and future directions of CEHP. [Learn More](#)

[Add to Wishlist](#) | [Add to Compare](#)

COMPETENCY ASSESSMENT AND LIFELONG LEARNING SERIES

CALLS

Links

[Policies and Tech Requirements](#)
[Guide for Managers and Directors](#)
[Community of Practice Guide](#)
[Group Discount Form](#)
[Forum Guidelines](#)
[Acknowledgements](#)

NEW Participation in CALLS learning tracks are valid for 1 eligibility point toward CCMEP™ certification or extension of certification. CCMEP™ is NC-CME's certification program for CME professionals.

This program is supported in part by educational grants from Pfizer, Inc., AstraZeneca LP, and Alcon.

My Cart

You have no items in your shopping cart.

Compare Products

You have no items to compare.

SECURITY METRICS
Credit Card SAFE

About Us | Customer Service | Site Map | Search Terms | Advanced Search | Contact Us

CourseStage's PCI-compliant e-commerce module allows for member/nonmember pricing, search functions, and product descriptions

- Self-serve, searchable knowledge base for administrators
Standard
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
2. Which training options are available? Mark each as standard, semi-standard, completely custom, third-party, or unavailable.
 - Self-serve online training (e.g., tutorials) for end users
Semi-standard
 - Self-serve online training (e.g., tutorials) for administrators
Standard
 - Scheduled online training (e.g., Webinars) for end users
Standard
 - Scheduled online training (e.g., Webinars) for administrators
Standard
 - Scheduled in-person training at client offices for end users
Completely custom
 - Scheduled in-person training at client offices for administrators
Semi-standard
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for end users
Completely custom
 - Scheduled in-person training at other location (e.g., in cities with concentration of clients or at conference) for administrators
Completely custom
 - Other (please specify and indicate whether it is standard, semi-standard, completely custom, or third-party)
 3. If applicable, briefly but specifically describe when telephone support for *end users* is available.
24/7 through Keener Communications or 9:30-6 EST , excluding holidays, through Web Courseworks.
 4. If applicable, briefly but specifically describe when telephone support for *administrators* is available.
9:30-6 EST, M-F, excluding holidays.
 5. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *end users*.
9:30-6 EST, M-F, excluding holidays.
 6. If applicable, briefly but specifically describe when personnel work to respond to e-mail support inquiries from *administrators*.
9:30-6 EST, M-F, excluding holidays.
 7. Briefly describe the company’s typical ongoing communication with its LMS clients.
We pride ourselves on exceptional customer service. WCW assigns a “solutions manager” or account manager to provide high-level relationship management with the client and to ensure that the client’s vision is being fulfilled. The account manager touches base with LMS clients quarterly, at minimum. WCW assigns a lead project manager to streamline client communications during the LMS implementation process. After implementation, clients contact our support team by phone or by online contact form for questions or troubleshooting.
 8. Briefly describe the company’s typical ongoing communication with its LMS clients’ end users.
Our online contact form can be opened up to all registered end-users upon client request. All technical problems submitted electronically are routed though our Client Service team and are handled on a tertiary basis.
 9. Provide any other information or notes relevant to the “Support and Training” section.
—

Custom Programming and Content Development

1. Does the company provide custom programming to extend or modify the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner
 - No
 - The company does not allow the LMS code to be modified.
 - Other (please specify)
2. What approximate percentage of your client implementations to date have involved custom programming work?
55%
3. Briefly describe the typical custom programming services provided for client implementations of the LMS.
CourseStage extensions and custom functionality to meet specific use cases, integration with third-party systems, and data feed communications.
4. Briefly describe the process for used for planning and implementing custom programming work.
 1. *Gather client requirements*
 2. *Blueprint programming customization*
 3. *Provide graphical mock-ups*
 4. *Client review and blueprint sign-off*
 5. *Code customization*
 6. *Code review* • 7. *Integrate code into CourseStage release version*
 8. *Testing*
 9. *Draft user documentation*
 10. *Push customization to client site*
5. Please specify the location (by time zone) of personnel involved in custom programming.
-6 UTC
6. Does the company provide custom development to create content (e.g., online courses) to play in the LMS?
 - Yes, through company personnel ✓
 - Yes, through a partner ✓
 - No
 - Other (please specify)
7. Please specify the location (by time zone) of personnel involved in custom content development.
-6 UTC
8. Provide any other information or notes relevant to the “Custom Programming and Content Development” section.
Web Courseworks specializes in custom interactive course development, course conversion services, and eLearning program evaluation. Our consultative approach to eLearning development augments our clients’ internal capabilities and improves training results. We help clients develop courses from start to finish or convert existing instructor-led training into an engaging online course.

About Tagoras Publisher of the Report

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Association Virtual Events, Association Learning + Technology, and Learning 2.0 for Associations.



About the Authors

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JEFF COBB

A managing director at Tagoras, Jeff has nearly two decades of experience in the world of marketing, education, and technology. He was cofounder and CEO of Isoph, a leading provider of e-learning technologies and services to associations. He has also served as senior vice president of business development for Quisic, an e-learning partner to top-tier business schools and fortune 500 companies, and as vice president of business development for LearnSomething.

Jeff is an award-winning teacher, author of the highly popular *Learning 2.0 for Associations*, and co-author of *Shift Ed: A Call to Action for Transforming K-12 Education* (www.shiftedtransformation.com), published by Corwin. His next book, *Leading the Learning Revolution*, will be published by AMACOM in January 2013. He has served on ASAE's Professional Development Section Council, as well as on the research committee of the eLearning Guild



and the editorial board of *Innovate*, a leading resource on technology and education.

Jeff speaks frequently about the impact of new technologies on business, education, and society in general. More information about his speaking is available on his personal Web site at www.jeffthomascobb.com.

CELISA STEELE

Celisa has led the development of successful online education sites with smaller groups like the Frameworks Institute and the Alliance of Chicago Community Health Services and large national and multinational organizations like the American Red Cross, the American College of Radiology, the Society for Human Resource Management, and WebJunction, an initiative of the Bill & Melinda Gates Foundation.

Celisa is a managing director at Tagoras, where she serves as editor-in-chief of the company's research publications. She was cofounder and COO of Isoph, one of the leading providers of e-learning services to the nonprofit sector. Prior to Isoph, she worked in creative services at Quisic, a developer of high-end online course content for major universities and Global 2000 companies. Before joining Quisic, Celisa worked in curriculum development for the not-for-profit Family and Children's Resource Program (FCRP), part of the Jordan Institute for Families at the School of Social Work at the University of North Carolina at Chapel Hill.

A veteran of the e-learning world, Celisa has served on the research committee of the eLearning Guild and, multiple times, as a judge in Brandon Hall's annual e-learning awards. She currently serves on ASAE's Professional Development Section Council.

Celisa is a published poet (www.celisasteele.com).