

Attachment A

LEARNING MANAGEMENT SYSTEM REQUIREMENTS

Attachment 1 contains Monterey County's known requirements for a Learning Management System (LMS). Please place a check mark next to each item indicating the appropriate category:

- **Base Product (BP)** – Indicates that the requirement will be met by the proposed product that is installed and operational. The cost of this function is included in the overall cost of the Contractor's standard application product.
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Note: LMS Coordinators – Each County department assigns one or two employees to have system administration access for generating departmental training reports and manage their department’s mandated training records.

Categories		Item #	Key Functional Requirements	Yes		No	Comments
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	End-User Interface	1	Product shall be able to accommodate multiple learning styles and intuitive.				
		2	Product shall allow all users to log-in and log-out infinite times.				
		3	Product shall have the ability to provide a course search to easily find a training by keywords, location, dates, or instructors.				
		4	Product shall have the ability to search course content and reference materials.				
		5	LMS Coordinators (County staff designated LMS Coordinators) should be able to edit the product's log-in page to show department information, logo, announcements, and etc.				
	Electronic Notifications	6	Product shall have the ability to do mass emails or alerts to promote upcoming classes.				
		7	Product shall notify department's LMS Coordinators via automatic email notifications when their department's end-users is enrolled and completes mandatory trainings.				
		8	Product shall forward automatic email reminders (pre-developed by LMS Coordinators) to end-users and supervisors for mandatory trainings.				
		9	Product shall forward automatic email notifications (pre-developed by LMS Coordinators) to end-users and supervisors when trainings are completed.				
		10	Product shall allow LMS Coordinators to develop and forward automatic email notifications (pre-developed by LMS Coordinators) to employees and supervisors for upcoming courses.				
		11	Product should notify managers and LMS Coordinators via automatic email notifications for whenever an end-user needs to complete a mandatory training at least one week prior to deadline.				
		12	Product should automatically generate and send a welcome email to new users once their accounts are created, with attached self-guided tutorial instructions.				
		13	Product should allow LMS Coordinators to develop and forward automatic email notification to their department's end-users for follow-up assessments and /or reviews at user-defined intervals after trainings.				
		14	End-users should have the option to add an alternative secondary email for automatic notifications.				
		15	Product should provide notifications within its system for employees who do not have email accounts (i.e. message from facilitators).				
	Reports	16	Product shall allow LMS Coordinators to generate a report filtered with the following parameters: department, position title, manager, date, and hours completed within a date range.				
		17	Product shall allow LMS Coordinators to generate a report of training participation by training type, class and section.				
		18	Product shall allow LMS Coordinators to generate customs reports of end-users that have not completed training.				
		19	Product shall generate downloadable reports (i.e. Excel and PDF).				
		20	Product should allow LMS Coordinators to generate a report of non-attendance in training by class and section, and by end-users and department.				
	Track Courses/ Transcripts	21	Product shall be able to track and manage user details.				
		22	Product shall be able to track and manage calendars.				
		23	Product shall be able to track and manage testing and surveys.				
		24	Product shall be able to track and manage class evaluations.				
		25	Product shall allow end-users to track their training progress.				
		26	Product shall be able to track employee's completion date for trainings.				
		27	Product shall allow LMS Coordinators to automatically assign and track mandatory courses within their department's end-users.				
		28	Product shall generate printable and electronic rosters (sign-in sheets) for trainings.				
		29	Product shall allow end-users to access and print training history, training plans, and/or performance improvement plan (linked to trainings).				
		30	Product should be able to track employee licensure by type and expiration date.				
		31	Product should have the ability to track third-party training, videos, computer-based training, and other self-taught training on the end-users' transcripts.				
		32	Product should allow LMS Coordinators to assign and track mandatory trainings by job classification.				
		33	Product should have the ability to track non-County employees (i.e. interns, contractor, and the public) with the use of a unique identifier.				
		34	Product may have the ability to track course, department, and supervisor over a course of time.				
		35	Product may be able to track and manage invoice processing.				
		36	Product shall allow to track no-shows, incompletes, and cancellations of training courses.				
	eLearning/ Classroom Trainings	37	Employee should have the capability to self-register for trainings, with an option to have an enrollment approval path (this will require the approval from immediate supervisors or other entities before an employee can enroll).				
		38	Product shall provide LMS Coordinators to create waitlists for existing trainings to determine demand and training dates.				

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Applications		39	Product shall allow LMS Coordinators to add training name and number.				
		40	Product shall allow LMS Coordinators to add training descriptions with no more than 200 words.				
		41	Product shall allow LMS Coordinators to add hyperlinks within training description for additional information.				
		42	Product shall allow LMS Coordinators to add registration date parameters.				
		43	Product shall allow LMS Coordinators to add course date and time.				
		44	Product shall allow LMS Coordinators to add hours required for trainings.				
		45	Product shall allow LMS Coordinators to add certification in end-user transcripts.				
		46	Product shall allow LMS Coordinators to add continuing education available.				
		47	Product shall allow LMS Coordinators to add location information for trainings.				
		48	Product shall allow LMS Coordinators to create and score tests for classroom and online trainings.				
		49	Product shall allow LMS Coordinators to set-up registration accessibility for certain trainings.				
		50	Product shall allow LMS Coordinators to assign trainings for end-users.				
		51	Product shall allow end-users to download certificates of completion for all trainings.				
		52	Product shall allow LMS Coordinators to develop online curriculums. This includes hosting multiple trainings, evaluations, and pre/post exams.				
		53	Product shall allow LMS Coordinators to add online evaluations.				
		54	Product shall have the ability to offer pre-test for online trainings and allow employees to pass course if receive a passing score.				
		55	Product should allow LMS Coordinators to add instructor's information.				
		56	Product should have the ability to provide video libraries that are tied or not tied to third-party vendor.				
		57	Product should have the ability to provide pre-built training libraries that are tied or not tied to third-party vendor.				
		58	Product should allow LMS Coordinators to duplicate trainings.				
		59	Product should have the ability to develop post pre-training and post-training work or assignment for training curriculums.				
	Mandatory Trainings	60	Product shall have the capability for LMS Coordinator to assign department mandatory training based on job classification.				
		61	Product should have the capability for LMS Coordinator to assign the frequency requirement of a class (i.e. annually, every two years, etc.).				
		62	Product should have the ability for LMS Coordinators to view mandatory requirements by job class.				
		63	Product should have the ability for LMS Coordinators to view mandatory requirements by employee.				
	Multi-Level Security Settings	64	LMS Coordinators shall have the ability to modify security levels and assign users to appropriate security settings.				
		65	Employees shall have access only to their own training records.				
		66	Supervisors shall be able to look up training records of their own employees.				
		67	Program managers shall be able to access training information of their division or department.				
		68	LMS Coordinators and trainers shall be able to access to all training records.				
	Course Features	69	The product shall have the capability to provide a searchable event catalog that can be organized and categorized by LMS Coordinators (i.e. title, keyword, category, delivery type, calendar view).				
		70	Product shall have bulletin boards/ discussion threads				
		71	Product may have virtual classrooms, such as Web-Ex and Web Streaming				
	End-User Payment	72	Product may have the capability to track cost of backfill for end-user attendance (course cost per participant).				
		73	Product may have the ability to track reimbursable costs.				
		74	Product may have the ability to track any user defined cost.				
		75	Product may have the ability to track expenses associated with off-site training courses.				
		76	Product may have the ability to track instructor cost.				
		77	Product may have the ability to track cost of training materials.				
	Customization Courses/ Curriculums	78	Product should have the ability for managers and supervisors to list career path for learning opportunities.				
		79	Product should have the ability to develop individual training plans for employees.				
		80	Product should allow employees to access and view course information that relates to specific job competencies and view career path learning opportunities.				

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		81	The product should be capable to assign pre-work to end-users prior to training that can be customized by the training division and for each department and by job title, dependent on the mandate and requirement (i.e. from training: New Employee Orientation, New Manager Orientation).				
		82	Product is capable to allow employees to access mentors in area of interest and time available.				
	Employee's Performance Evaluation	83	Product shall provide hierarchal security levels for performance evaluations.				
		84	Product should have objectives-based evaluations.				
		85	Product should have the capability to enter multiple evaluations (i.e. probationary and annual) by bargaining units.				
		86	Product should be capable to link training plans for end-users to performance evaluation results.				
		87	Product should be capable to allow end-users to provide a tracking mechanism linked to succession planning for competencies related to a career track.				
		88	Product should be capable to track individually-developed performance plans, which include skill sets needed to be advanced to the next level.				
		89	Product should provide monitoring and tracking of review status completion for the employee and manager, including a dashboard with milestones and status.				
		90	Product should provide the capability for the employee or manager/supervisors to nominate additional raters to provide feedback.				
		91	Product should allow the evaluations to be locked once it's approved by both employee and supervisor.				
		92	Product should provide access to competency details (behavioral description, proficiency levels, previous performance evaluation) to rater(s).				
		93	Product should be capable of providing automatic reminders to manager/supervisor of performance evaluation due dates for each employee under his/her supervision.				
		94	Product should provide the capability to allow employees to respond to their evaluation.				
		95	Product should allow the employee to view, approve, and reject his/her evaluation once supervisor has submitted it.				
		96	Product should provide printer-friendly employee evaluation form.				
Technical	Training	97	Product shall provide electronic manuals.				
		98	Contractor shall provide sufficient formal training to LMS Coordinators during the initial phase of implementation.				
		99	Product should provide a "hands-on" learning environment for LMS Coordinators and employees.				
	Customer Support/ Maintenance	100	Contractor shall provide a highly responsive ongoing maintenance and service programs that meets the needs of the product.				
		101	Contractor should deliver customer and technical support via phone or email to LMS Coordinators during business hours (Monday-Friday from 7:00 am-6:00pm Pacific Time).				
		102	Product should provide a 24/7 on-line video tutorials for end-users and LMS Coordinators.				
		103	Product should provide a "hands-on" learning environment for LMS Coordinators and employees.				
	Application Interoperability	104	Product shall be compliant with all eLearning and Learning Management Systems (LMS) standards (i.e. SCORM, AICC).				
		105	The product shall be a configurable system capable interfacing with HR Advantage (CGI). Example of fields includes: EE, EEID, department, unit, supervisor, and job title.				
		106	Provision single sign-on for end-users/ ADFS (Active Directory Federation Services).				
		107	Product shall be browser-based and compatible with the following: Internet Explorer 11, Google Chrome, Mozilla Firefox, Chrome.				
		108	Product should have an equivalent option for Software as a Service (SaaS).				
		109	Product should automatically generate new employee's profile within 24 hrs. of hire.				
		110	Product should provide additional temporary license for external users/ non-County employees to log-in and access trainings.				
		111	Product should allow administrators to automatically switch external and temp. employees into permanent County employee on the system without hindering their training and certification history.				
		112	Product should be able to integrate with other learning systems in the County, including and not limited to: TargetSolutions and HealthStream.				
		113	Product should provide customization/ expansion option; must be fully supported by future updates to the product for the first 5 years of use.				
		114	Available upgrades should be available and installed during the term of the agreement without additional cost.				
		115	Product should be accessible through tablets and smartphones.				
	Employee's Information	116	Product shall allow to have a hyphen on employee's name.				
		117	Product should have the capability to load end-user's training history from former LMS product (Meridian 9.2).				
	Migration	118	Product shall allow data migration from current County's Learning Management System.				

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		119	Product shall provide application access by integrating the application security with the operating environment security.				