

Domains and Organizations

What You Need to Know Before Creating Them

Once you start actually setting up your LMS from SumTotal, one of the most important things you need to do is figure out the structure of your domains and your organizations. We'll come back to domains. For now, let's focus on organizations. Most of us are familiar with organizations, so it's an easy place to get started.

What are organizations? Organizations are used to group individuals, like in your typical, everyday org chart. That's fine, but to truly take advantage of LMS, individuals really need to be grouped according to their training needs, not the cost center they report up through. In fact, individual learners often need to be grouped in several different ways for the system to truly be the most effective.

For instance, one common way for learners to be grouped is by jobs. Every person can have many different jobs, but only one primary job – the job they talk about when somebody asks what they do for a living. When the system is first set up, a person's primary job is the one that's used in Report Manager; other jobs they might perform are not. (Although, of course, this can be customized, if need be.)

How about an example? Let's say that learners need to be grouped in three different ways: by the type of job performed, by region, and by language. Jobs can be used for the first grouping, while organizations can be used for the other two. Two different organizational structures can be created: one that looks at people by region, and one that looks at people by language. This isn't a problem since each individual can belong to multiple organizations and multiple structures or hierarchies.

That's all well and good, but if organizations can do all that, the real question is this: *when should a domain be created instead of an organization?* Luckily, the answer is simple. The general rule of thumb is:

When in doubt, make it an org.

Unless you have some very important reason to create a domain, you should make an organization instead. In practice, there are only four main situations where you might need to create a domain instead of an organization. They are:

1. A group of people need to have administrative rights to part of the system, but not all of the system. Some typical administrative chores are:
 - **Modifying Users.** An administrator needs to be able to add, modify, and delete certain predefined users, but they should not be able view or delete other users.
 - **Modifying Learning Activities.** Members of the training staff need the ability to create, modify, and delete Learning Activities, but only their own learning activities. They don't need those same permissions for Learning Activities owned by other users.
2. The catalog for one group needs to be completely different than another group's. Again, this not generally a compelling reason in and of itself, but it may be for some.
3. Notifications and/or approvals need to work differently for different groups. This is all well and good, but you might be able to create these setting so that they work well for everyone--especially since both can be modified at the Learning Activity level--and not have to deal with a domain at all.

And sure, it might seem nice to have all these abilities in a number of different places, but that violates are rule of thumb. (Remember, it's "When in doubt, make it an org.") Why is that? Because domains take more administration and, therefore, take up more overhead than organizations. That means more ongoing maintenance--and more work--for you, and who has time for more work? Try to keep the number of domains low from the start to see how it works for you. If you decide later on that you really do need more domains, it's not that hard to add them or even to convert an organization to a domain later on in the process.

So, once you finally figure out your domain and organization structure, count the number of domains. How many do you have? If you've only have half a dozen or so, or maybe even a dozen, you're probably pretty well set. If you have, say, 50 or more, you probably have too many, which means more work for you, and we've already established that no one really has the time for that. (There are, of course, exceptions to this.)

To help trim down an unreasonably large number of domains, look back at the four reasons you might need a domain and make sure there are actually compelling reasons for each of your domains. Examine your current business practices and see if a few small changes might decrease the number. Suppose you want to set up one domain because a lot of different people need to be able to add users to the system, but you don't want them to be able to see or modify users from other groups. In this case, creating or modifying a role might be all that is needed: such a

role could allow the ability to add users, but not to modify or delete user accounts. And yes, this might mean some overhead or maintenance is required on your part, but it will likely be much less than the amount of work it takes to maintain a prohibitively large number of domains.

Thinking through your domain and organizational structure up-front might take some time, but it's well worth it in the long run. Not only will it ease the transition to the LMS and help increase user acceptance of the new system, but it can also help increase both the abilities and--just as importantly--the potential of your entire training team.

Irene Campbell has a lot of jobs, but only one primary job – consulting on SumTotal products – which she began working with over 20 years ago. During this time, she has learned quite a bit about domains and organizations. More to the point, she has worked with clients on everything from small, phased rollouts to gigantic projects involving international LMS rollouts in multiple languages to several million users with thousands of learning activities.

If you are effectively managing your domains and, as a result, have the time to send a comment, question, or suggestion about this article to us, please do so. We can be reached at articles@terrabia.com.