

# Get Role-ing with Your LMS

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Once you're ready to get started using the LMS from SumTotal you need to decide what, exactly, you want your users to be able to do when their in the system. In other words, you'll need to give them a role. And no, I'm not talking about skits at the company picnic. In the LMS, roles define what users can--and, just as importantly--cannot do when they are using the system.

Below, I've listed some of the most common roles that are usually established in the LMS. Your needs, of course, will be different, and other, customized roles not discussed here can be added as well. So just think of this list as a starting point to get the ball rolling, which often seems like half the battle. Of course, this still leaves you with the other half of the battle, but it's better than being responsible for the entire thing on your own, isn't it?

## Learner

I know, this is an obvious one, but that doesn't mean it's not important. (Plus, who wants to start with the least obvious? Low hanging fruit, etc ...) After all, most of your users will be learners: that is, someone who takes the training and nothing else. With learners, the idea is to keep what they can and cannot do to the minimum: not just for security, but also to keep them focused on the task at hand--learning.

Generally, learners can do things like:

- 🔍 Search, browse, and register for training.
- 🗑️ Cancel their registrations.

There are, of course, less common tasks that learners can perform as well, such as:

- 📅 Training Plans.
- 👤 Alternate Job Analysis.
- 📝 Self-Reported Training.

Some companies will include a few of these at launch, but most start by keeping things simple and streamlined for the launch and then add in more abilities later once people get the hang of things.

## Manager

Managers (sometimes referred to as supervisors or leads) are learners who also manage others. Bet you didn't see that one coming, did you? This means that managers can do everything an average learner can do, but they can manage their users as well. (Again, low-hanging fruit ...) In practice, this means that managers can not only access learner mode (to allow them to finish their own learner tasks), but also an additional manager mode, which lets them:

- View learners they manage.
- Register a managed learner or cancel registrations.
- View a managed learner's training schedule, training transcript, and assigned training.
- Approve training for a managed learner.

## Enroller

The Enroller. No, it's not just a lame superhero name--although it certainly could be. Enrollers are basically just learners who also have the ability to register other learners for classes. Usually, enrollers are learners who have easy access to a computer when other learners might not. Some examples of this might include an HR person for a retail company enrolling for store employees, or an admin assistant enrolling factory floor workers. Not every company will need an enroller, but not only is it fairly common, but it's also a cool feature that lots of people don't know exists. I mean, cool as far as LMS features go, anyway. Not rock-star cool or anything like that.

Anyway, as you might guess, enrollers can register a certain set of users--which you can define in the LMS--for training. Besides being able to access all the learning functions that are available to everyone, enrollers can:

- Register users they are allowed to see.
- Approve training for users they are allowed to see--if you want your workflow set up this way.

## Instructor

If you have courses, odds are you'll need an instructor of some kind. After all, they go together like Abbot & Costello, Peanut Butter and Jelly, and things like that. For our purposes, though, instructors are basically learners who not only can enroll learners, but also teach. This means they can do all the things that both learners and enrollers can do, but also:

- View the Instructor Schedule.
- Manage the roster for all activities they teach.
- Approve learners into their classes.
- Create and manage classes.

There's more, however. There is a second type of higher-level instructor that gives them the ability to perform even more tasks. Besides everything listed above, this second type of instructor may have one or more of the following abilities:

- Create and manage *any kind* of learning activities in the LMS.
- Upload online content onto the LMS.
- Create and manage resources such as vendors, facilities, locations, and equipment.

## Training Coordinator

Now that you have all these learners and enrollers and instructors running around, you need someone who can help you stop the insanity and keep things under control. That person (or those persons) may be called training coordinators. Like instructors, they can enroll other learners and manage learning activities. Unlike instructors, however, they can usually create *any type* of learning activity--not just courses. This means that training coordinators not only have all the same permissions as learners and enrollers, but also have the ability to:

- Register any user in the domain.
- Edit existing domain users.
- Create and manage any type of learning activities.
- Create and manage resources such as vendors, facilities, locations, and equipment.

## Domain Administrator

Now we're getting somewhere. In the LMS, domain administrators are almost all-powerful, but not quite--the Crown Prince compared to the King. Domain administrators have the highest level of permissions in a domain. This means they can do everything that all the roles listed above can do, plus:

- View and register all users in the domain.
- Manage rosters for any learning activity in the domain.
- Manage all users, organizations, jobs, and audiences in the domain.
- Create and manage evaluations.
- Make users instructors.
- Manage notifications in the domain.



## **System Administrator**

Last, but certainly not least, is the King; the all powerful System Administrator, who has control of the entire system. For example, System Administrators are often the only ones who can delete learning activities. This role doesn't need to be created, however--you can just use the one that came with the system. Be warned, however: with great power, comes great responsibility. Because of this, very few users should be System Administrators, just 2 or 3 max.

*Irene Campbell has tried all of these roles. While she admits there is something to be said for being all-powerful, what she really likes is working as a consultant on SumTotal products, which is something she's good at, what with having started working with them over 20 years ago. During that time, she's worked with all manner of clients (and in all sorts of roles), from companies with small, phased rollouts to big multinationals involving LMS rollouts in multiple languages to millions of learners.*

*If you would like to take on the roll of "Critic," feel free to send any comments, questions, or suggestions on this article to [articles@terrabia.com](mailto:articles@terrabia.com).*