INTRODUCTION TO LITMOS

Litmos is the LMS (Learning Management System) platform **OPTA**VIA uses to house trainings for our Coach Community. It is also referred to 'The Learning Center' or '**OPTA**VIA Learning Center'. The system contains training videos from Leaders that help guide Coaches to grow their business.

Some of the topics in The Learning Center include:

- *Your LifeBook*: The Elements
- **OPTA**VIA Together Live videos
- Monday Leadership Calls
- Wednesday Night Habits of Health Community Time and Inspiring Stories
- Certification

This platform also offers the user the ability to track their progress so far with the trainings as well as access pertinent documents related to the videos they are watching.

There is not a corporate account to access The Learning Center. Coaches can gain access to The Learning Center by creating an account directly through the website or purchasing certification. When they purchase certification from **OPTA**VIA Connect, they will be redirected to The Learning Center.

To log-in to The Learning Center, go to: https://medifastinc-test-17203531.litmos.com/account/login. *(will be updated when we move to production)*

As a member of the Field Training Team, it will be important to have an administrator log-in for The Learning Center. This access is reserved for Field Training members and any other internal employees that require access to the LMS with the approval of the Field Training Manager.

These log-ins will be necessary when reviewing and uploading content. This document will review SOPs related to The Learning Center, particularly SOPs that would be specific to an administrator of the system.

When viewing/creating content in the LMS, there are three terms to be aware of:

Learning Path: This is the largest bucket of content within the LMS. When you have courses that are part of a set, best practice is to put them all in one learning path. Learning paths can contain several courses.

Course: This is the second largest bucket of content within the LMS. Every module that is created resides in a course, which may reside in a learning path. Each course can contain several modules. Course can be stand alone and live outside learning paths

Module: This is referring to the individual videos/components within the LMS. Every module is housed in a course, which may reside in a learning path.

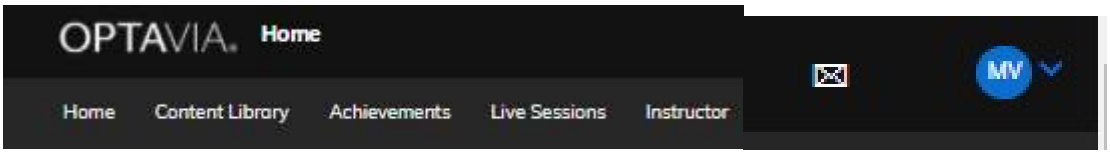
Example:

Learning Path: OPTA*VIA Together Live*

Course: *Breakout Sessions*

Module: *Identify*

When logged in as a learner, you will have the following menu options available to you:



Home: This will take redirect you to your dashboard. The dashboard widgets we have activated for **OPTA**VIA are:

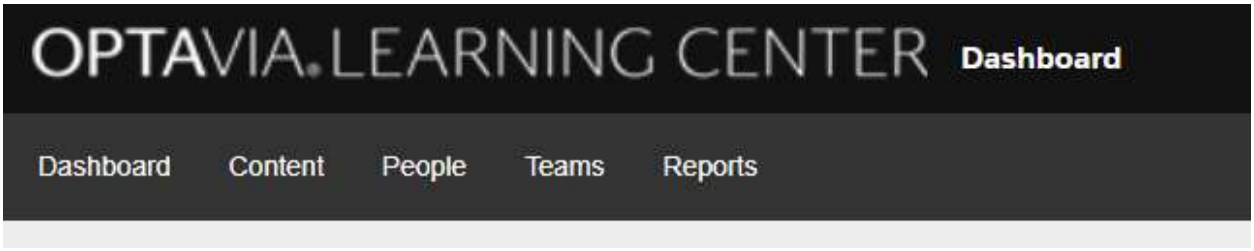
- Content
- Recent Achievements
- News
- Favorites
- Calendar
- Recently Viewed
- Login Week Streak

Content Library: This will take the user to all content available to them. They can sort by course, learning path, collection, alphabetically, their favorites, etc. This is a great way to easily access all the content available to the user.

Achievements: This will show the user their achievements in Litmos, meaning the courses that they have completed. This will also show any badges they may have achieved as a result of completing courses.

Live Sessions: This will allow the user to attend live sessions through the platform, if applicable. We are not currently using this feature.

When logged in as an administrator, you will have the following icons available to you:



Dashboard: The admin dashboard will show the user the following:

- Total courses
- Total Users
- Active Courses
- Active Users
- Activity
- News
- Modules Require Making
- Recently Viewed

The Admins will also see short cuts from the dashboard to create a course, user, team, or schedule. We will review how to do the above in further SOPs.

SOP: Creating a New user in Litmos

Objective:

To create access to the LMS for **internal team members**. Depending on their position and requested access level, they will either gain access to one, two, or three markets and possibly administrative access. Any admin access should be vetted by Manager, Field Training.

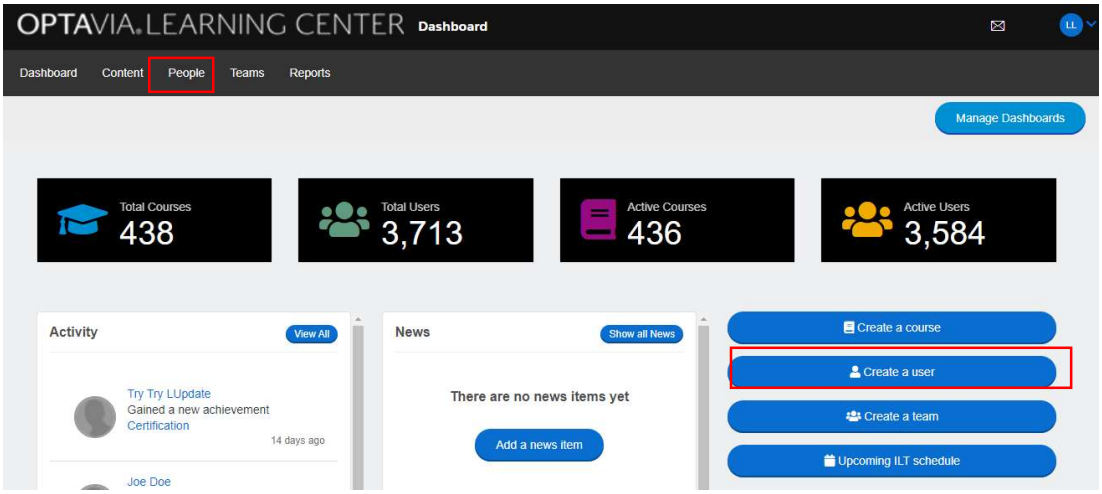
As a note- **Administrators should not create access for Coaches**- Coaches will log-in by creating their own username and password when they purchase certification or go directly to the Litmos website: optaviaearning.com

Creating a User:

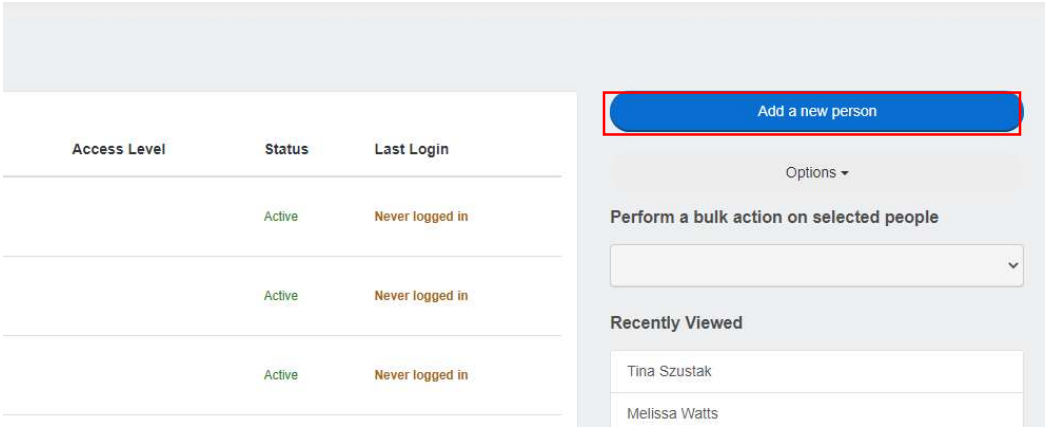
1. To begin, log into the LMS using your administrative username and password. If you do not have an admin log-in, you will not be able to create a new user.



2. Once logged in, you can either click on the 'create a user' shortcut from your dashboard or the 'people' tab at the top of your dashboard:



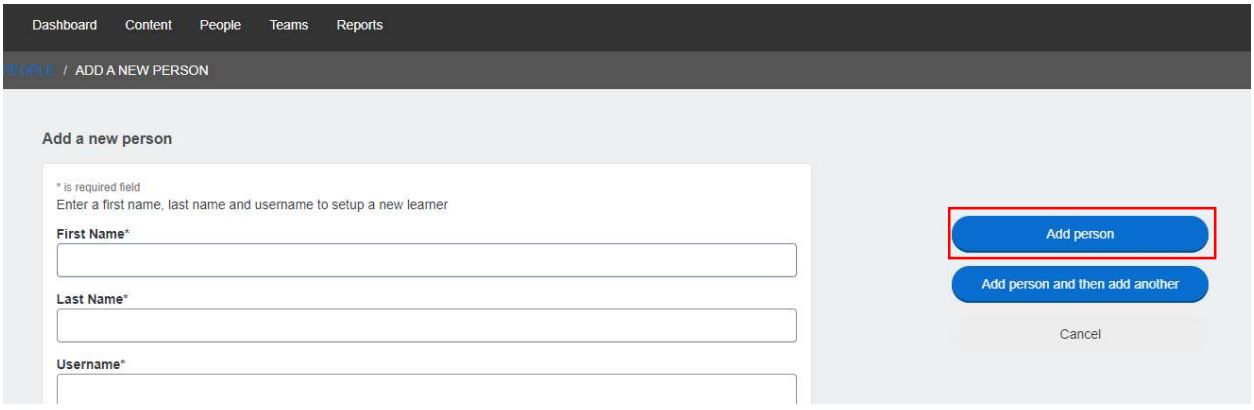
a. If you click people, then go to the right and click ‘ add a new person’



b. If you click ‘create a user’, proceed to step 3.

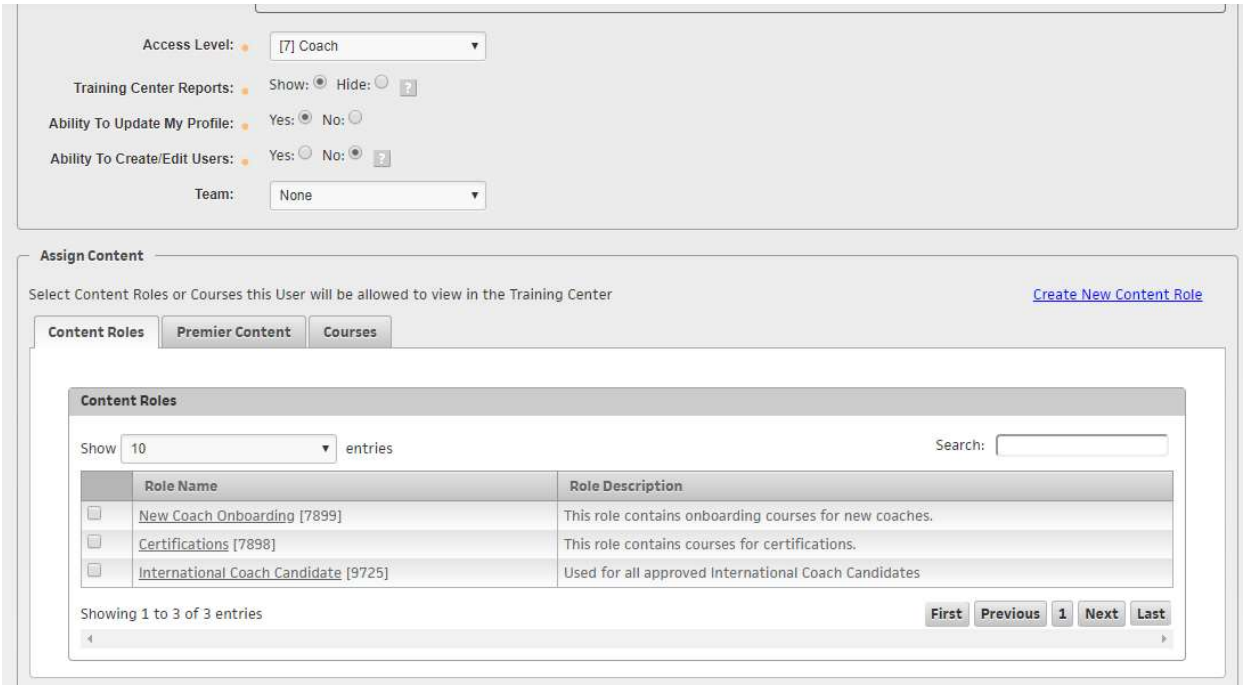
3. Enter in all necessary information including:
   a. First Name
   b. Last Name
   c. Username (usually first initial last name)
      i. Keep “send an email to this person with a link to login” checked
   d. Access level (dependent on person)
   e. Email
   f. Password (Welcome1!)
   g. User type

4. When information is entered, click ‘add person’

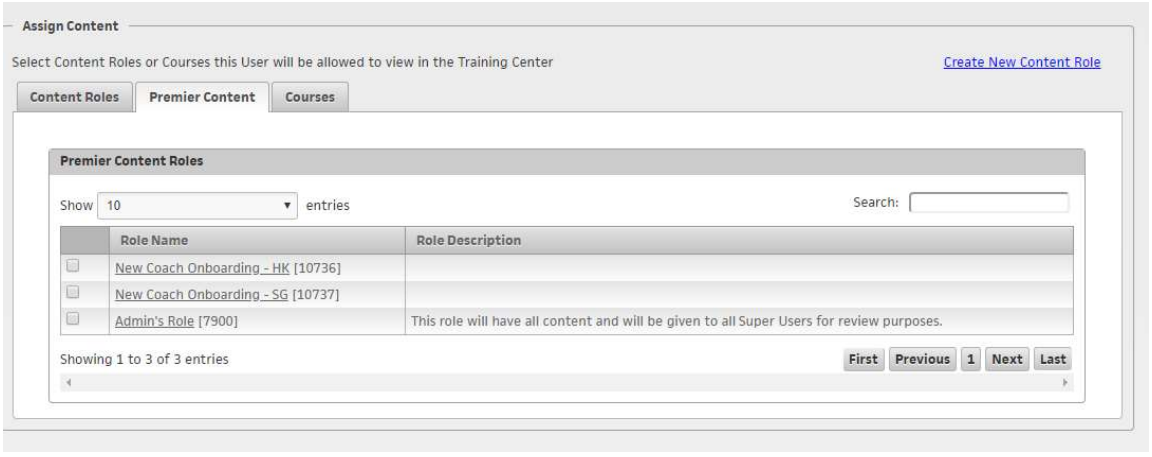


5. The new user will get an email enabling them to log into Litmos.

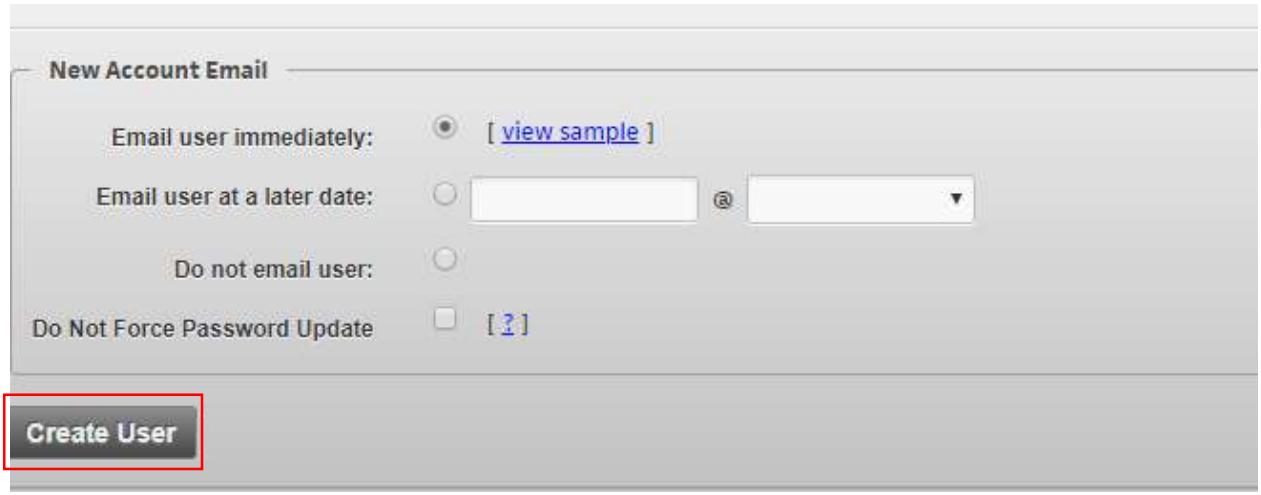
6. You will then determine the application settings, including the access level, content roles, and available courses. Depending on access level desired, select the appropriate access level and content.



7. If you are creating access for an internal team member who needs all three markets, best practice would be to create **three separate log-ins** for each market so there is no confusion as to what each market has visibility to. You will select the specific market from the 'Premier Content' tab.



8. Once you have decided on content roles, access roles, and available courses for the user you can send a new account email, either immediately or at a later date. Once you have decided on when to send the email, click 'create user'.



9. Best practice would be to have the user sign-in to ensure they have access to the appropriate content and markets. If there are discrepancies in what they should have access to, you can manipulate their access in the 'manage all users' area. This will be detailed in another SOP.

10. If there are any questions or concerns with adding a new user and assigning them to the appropriate content, please reach out to Lightspeed Customer Service: 702-369-4260

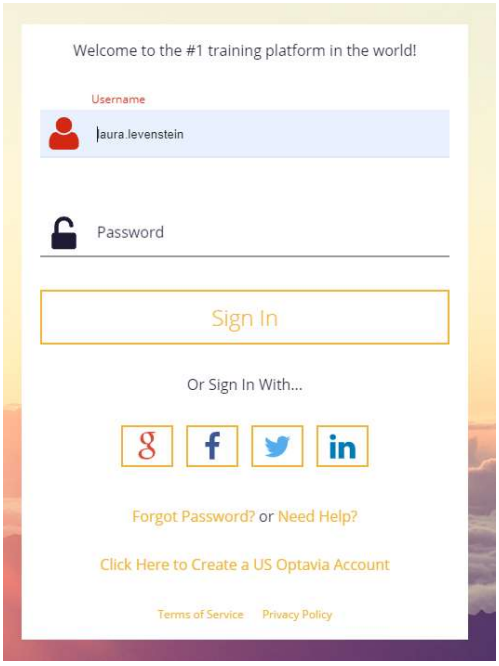
MANAGING USERS IN THE LMS:

Objective:

This SOP will show the user how to manipulate the user settings of a Lightspeed account. An account user may need updates to their access due to change in employment, updates to responsibilities, or possible errors when initially setting up their account.

Lightspeed admins should not update the account settings of Coaches. This process is to be used on employee accounts.

1. Log into your admin account in the LMS.

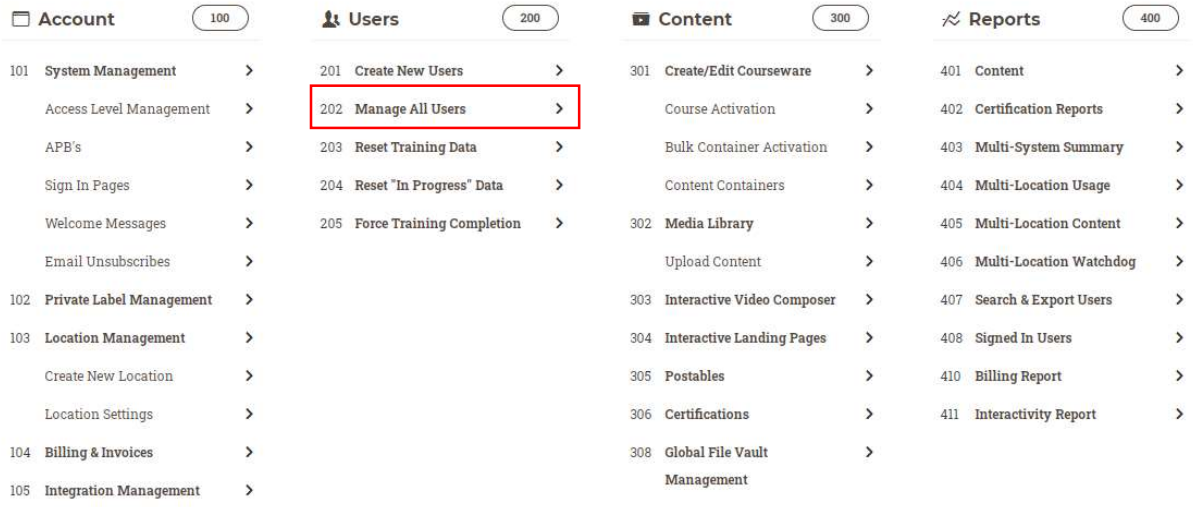


If you do not have an admin account you will not be able to manage a user account.

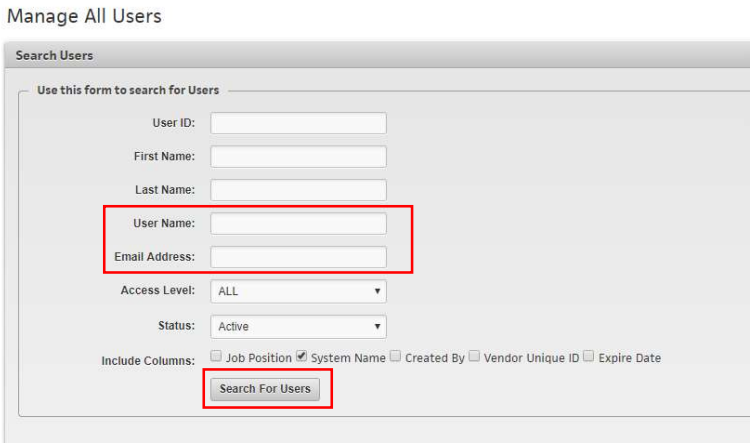
2. Once you are logged in, click on the super user dashboard icon on the top right.



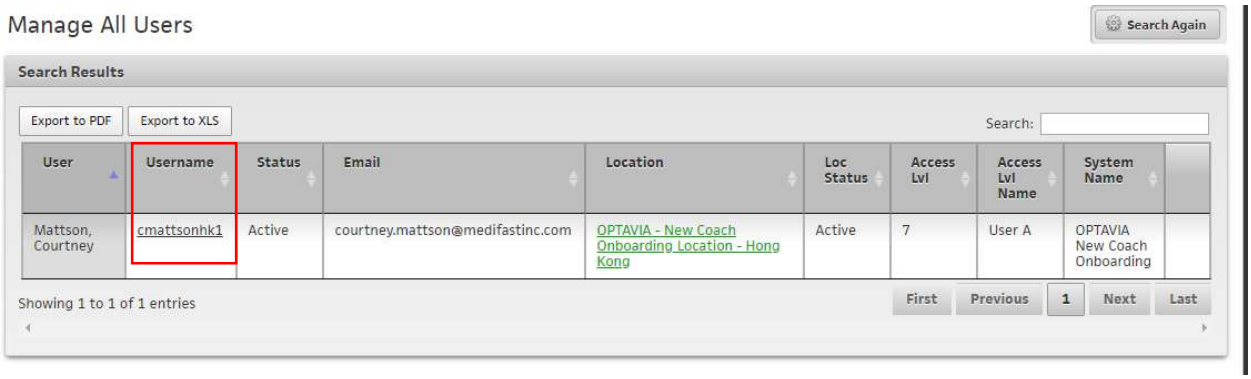
3. From the super user dashboard, click on ‘manage all users’ from the ‘Users’ column:



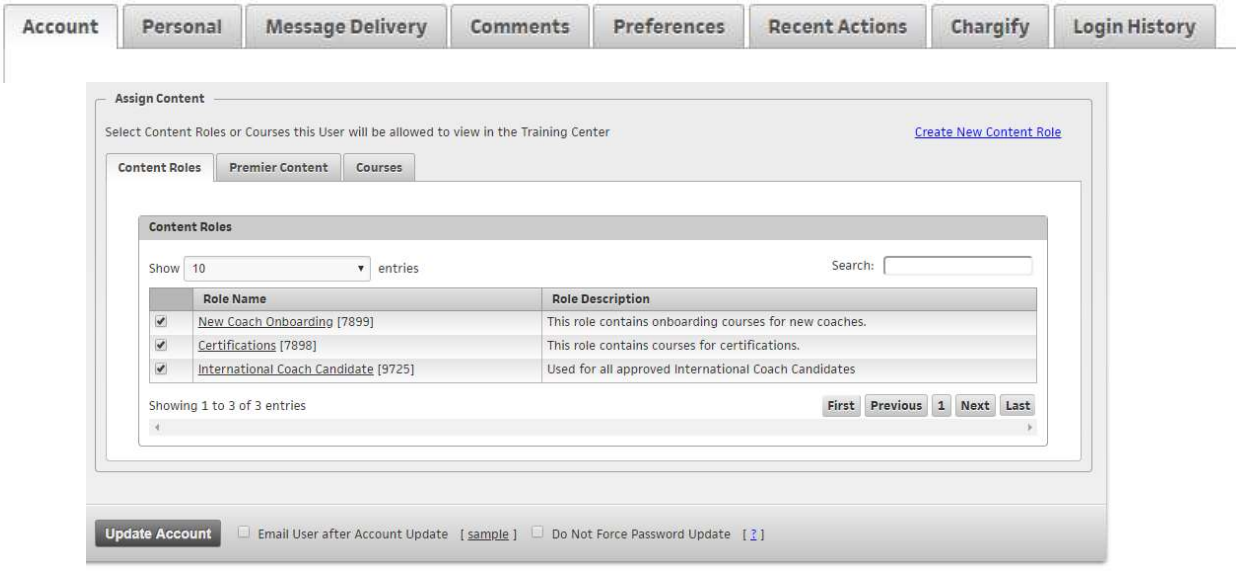
4. Find the user you would like to manage by typing in their username, first and last name, or email address. Best practice would be to find the user using their username or email as there may be multiple first/last names in the LMS system. Once the information is entered, click ‘search for users’.



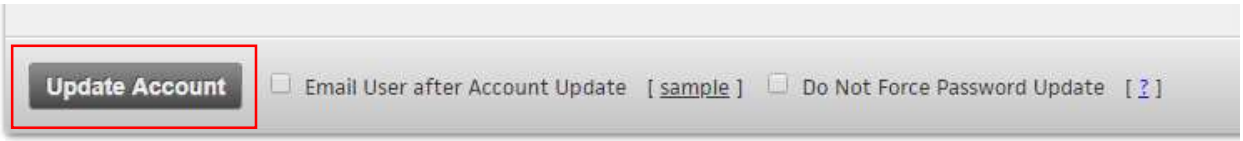
5. Once you locate the appropriate user, click on their username to enter their account settings:



6. From here you can modify any setting necessary, such as content roles, Premier Content, Courses, access levels, name, and account information. Scroll down to update content information. You can also choose from the tabs on the top to update or track:
    - Personal Settings
    - Message Delivery Settings
    - Comments (if applicable)
    - Preferences
    - Recent Actions
    - Chargify (subscription status for billing purposes)
    - Login History



7. Once you finish updating the user account settings, click ‘update account’.



8. Once you have updated the account settings, ask the user to log into the account to confirm the settings are accurate. If not, go back in and update accordingly.

CREATING/DELIVERY METHOD FOR CONTENT FOR EACH MARKET:

Objective:

This SOP will walk the user through the process of assessing, deciding on, and creating appropriate content based on the needs of each market. Each market (United States, Hong Kong, Singapore) has various needs based on the audience of Coaches. For example, the Coach Community in the United States is much more established than Hong Kong and Singapore, so their training may be more advanced, where as Hong Kong and Singapore may be more

focused on the fundamentals of coaching. Although the audience may change, the process of creating and deciding on a delivery method for the content will remain consistent though each market.

Field Training based in U.S. will collaborate with International markets to confirm training needs and the most appropriate delivery method. Once content and delivery method is confirmed, Field Training based in U.S. will complete the process necessary to make training available, including content creation, branding, legal review, captioning, and posting to LMS. During this process, Field Training based in U.S. will consistently keep International markets aware of the progress.

Additionally, training may be requested by both corporate members of each market as well as Leaders in each market.

1. The first step in the process is to identify necessary trainings within each market. This can happen in a variety of ways:

    a. Specific training is requested by **OPTA**VIA Leaders based on needs of the Field. *This is currently more common with U.S. Leaders, as Hong Kong and Singapore are newer markets and do not have Leaders within their markets.*
        i. Ex: Healthy Happy Holiday training to prepare U.S. Coaches for the Holiday Season.
    b. Training is the expected and logical next step based on what is currently in the LMS.
        i. Ex: The current LMS has trainings designed to help Coaches advance to Senior Coach. The next logical training would involve advancing from Senior Coach to Blended Executive Director/Executive Coach.
    c. There is a specific need identified based on feedback from the **OPTA**VIA Coach Community.
        i. Ex: Survey and call monitoring have shown a lack of understanding of the Compensation Plan from the Coach Community and more clarification is needed.
    d. Corporate Team Members have identified a need based on trends and feedback.
        i. A Companywide needs analysis is completed and needs are identified based on the findings.

2. Once a need is identified, the next step is to determine the best delivery method for the content, prior to content being created. The delivery method will greatly affect the way the content is created. The decision on the delivery method will be a collaboration between Field Leaders and internal teams, such as Creative Team, Communications Team, Nutrition and Wellness Team, and Field Training.

    Content can be delivered in a variety of ways:
    - Zoom recording of a corporately created PPT
        - Ex: Healthy Happy Holidays
    - Course created with Lightspeed and uploaded into the LMS
        - From Senior Coach to Blended Executive Coach/Executive Director
    - Monday Night Leadership Call announcement
        - Updates to incentive (2019 Dash)
    - Communication via newsletter, Agents of Transformation Facebook Page, or other social media platform.
        - Ex: Instructions on how to access YouTube and podcast videos
    - Event Training
    - Other delivery methods as needed

3. At this point the training need and delivery method has been identified. From here, it is time to create the content. This step will vary greatly depending on the decisions made in the previous steps, but some of the process may look like the following:

If Zoom recording:

- Work with the Creative Team and Compliance Team to create the PPT needed for the Zoom recording.
- Collaborate with Leaders to determine who will be the best **OPTA**VIA Coach to record the Zoom.
- Once the Zoom is created and reviewed by our Legal Team, send over to the specified Coach to complete the recording.
- Once recording is received back from the Coach, send to Compliance for review.
- Edits from Compliance will be completed by the Creative Team.
- Creative Team will send Field Training the edited version to be captioned.
- Training Team will order captions on the recording via REV (instructions above). If this recording will be viewed by APAC Coaches, ensure you are ordering both Simplified and Traditional Chinese captions as well as English.
- Once recording is captioned and edited by Field Training (instructions above), Field Training will inform the Creative team the recording is ready to be posted.
- Work with Social and Creative Team, depending on where the video is to be posted, and ensure the video is posted to the appropriate location.
- Collaborate with Communications to ensure training information is communicated to the Field.

If Course to be Created and Uploaded to LMS via Lightspeed:

Field Training has the ability to upload content to the LMS on their own. However, Lightspeed offers a service where **OPTA**VIA can bring them a script and speakers for the videos, and they will produce the content, include interactivity, quizzes, etc. and upload to the LMS. This service costs $10,000/finished hour of content.

This type of service would be beneficial when creating content that will have more value when looking professionally shot and published, rather than zoom recordings from Coaches. Some possible topics for this type of service include:

- Going from Senior Coach to Blended Executive Director/Executive Coach
- Compensation Training

If this is the agreed upon path, Field Training will reach out to Lightspeed (702-369-4260) once script has been written and Coaches have been selected to participate in the video. Filming/production for content produced via Lightspeed happens in Las Vegas, NV.

Here is an example of draft script:

https://docs.google.com/document/d/1zxZ4uGWi4mnhSZf-pUm138124i9exw1yj23-5K0LBLw/edit

Field Training also has the ability to create interactive courseware on their own, without the assistance of Lightspeed. For further information, please see:

https://support.lightspeedvt.com/knowledge-base/interactive-video-best-practices/

We will review uploading content in the LMS in a future SOP.

If Monday Night Leadership Call Announcement:

- This type of information will most likely be relayed by one of our internal teams, such as Coach Success or Events.
- If there are to be slides for the announcement, the Creative Team will receive the request from the appropriate team and send through Compliance to be reviewed.
- Once review is completed, the Creative Team will make necessary edits.
- Field Training will reach out to Dr. A to confirm he is in the loop regarding the announcement. Additionally, there may be another requested speaker to help make the announcement. Field Training will also communicate with this person to ensure they are available and understand the expectations for the announcement.
- Field Training will ensure they have invited the appropriate speakers on the call and have the final, approved version of the graphic or PPT to be shared on the call.
- Field Training will facilitate the Monday Night Call as expected (SOP above) and possibly assist with slides during the announcement, depending on the request of the internal team.
- Once call recording is reviewed, edited, and captioned, the call will be posted to appropriate medias to be shared.

Communication via Social Media:

Communications via Social Media will be determined between Field Training, Field Leaders, and the Communications Team.

- Once it has been determined that the information can be relayed via communication on one of the Social Media platforms, the Creative Team will design and send the communication to the Compliance Team.
- Once the Compliance Team has reviewed, Creative Team will complete edits and send to the Social Team to upload to the appropriate platforms.

The Field Training Team will be involved in the beginning when determining the most appropriate way to communicate the information. Once a Social Media communication is decided on, Field Training will not play a major part in creation of posting, unless needed for confirming communication.

Other delivery methods will be decided upon on an as needed basis. Field Training should be prepared to accommodate needs of the Field and other teams within **OPTA**VIA as needed.

UPLOADING CONTENT INTO THE LMS

Objective:

This SOP will walk the user through uploaded completed content into the LMS Lightspeed. There are several options when uploading content, which will depend on whether you are creating a new category, a new course within a category, or a new chapter within a course within a category.

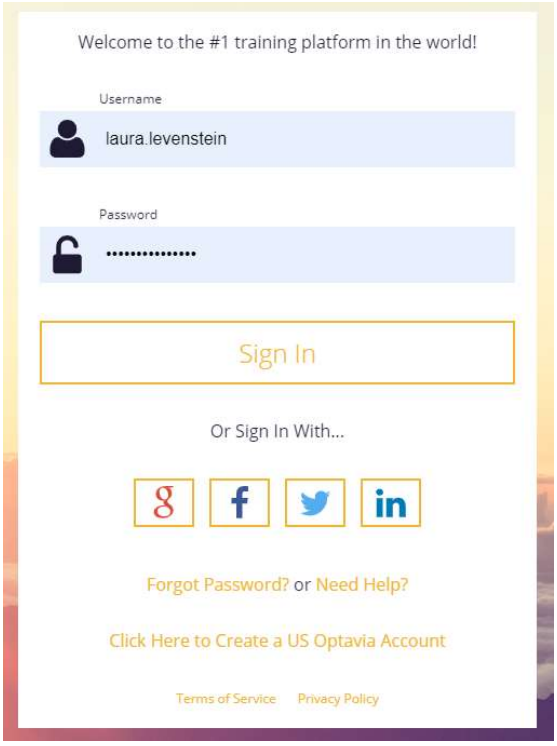
This SOP will review how to add a new category, a new course, and a new chapter. In some instances, you may need to do add a combination of categories, courses, and chapters depending on the content to be added.

You will need administrator credentials in order to upload content into the LMS. If you do not have admin access, please refer to the Manager, Field Training.

Adding a new Category:

As a reminder, a category is the largest bucket of content within the LMS. Every course that is created has to reside in a category. Each category can contain several courses. You will not be able to put a course or chapter into the LMS if it does not go into a category.

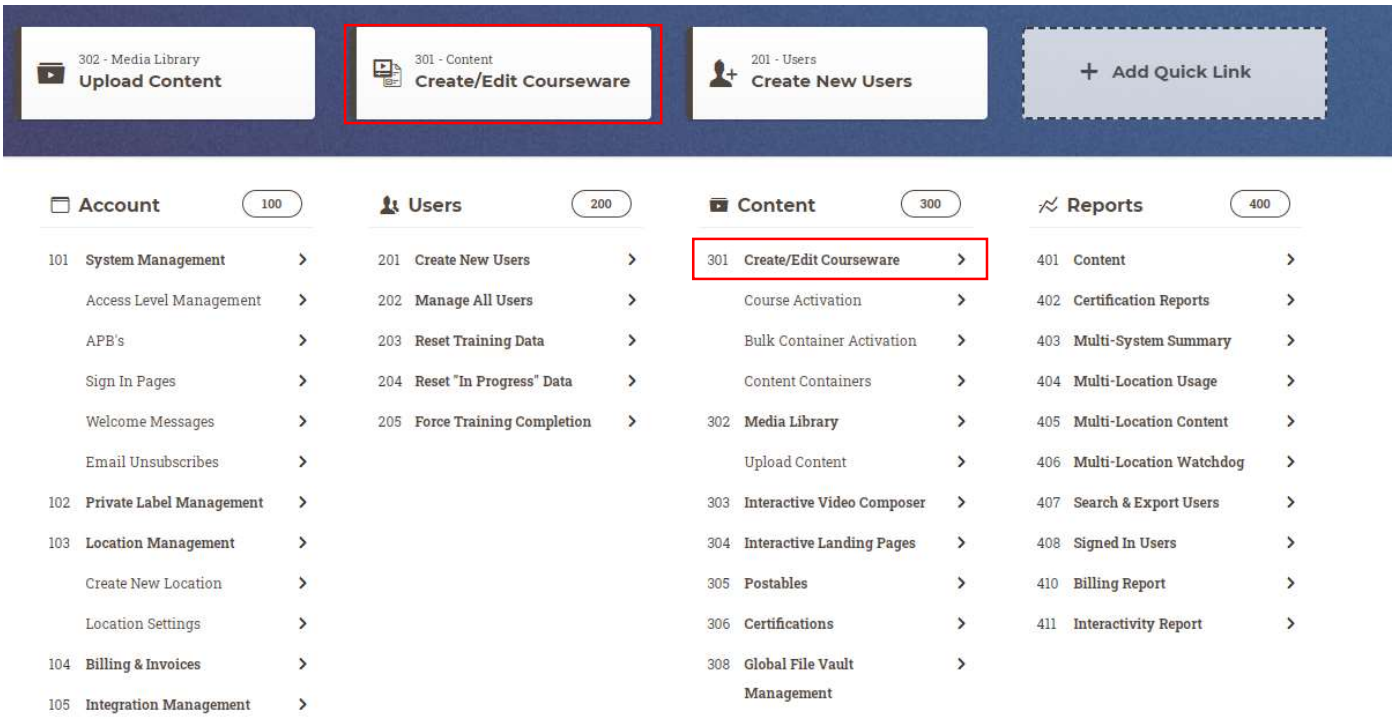
1. Log into the LMS using your administrator credentials.



2. Once logged in, click on the 'super user dashboard' icon.

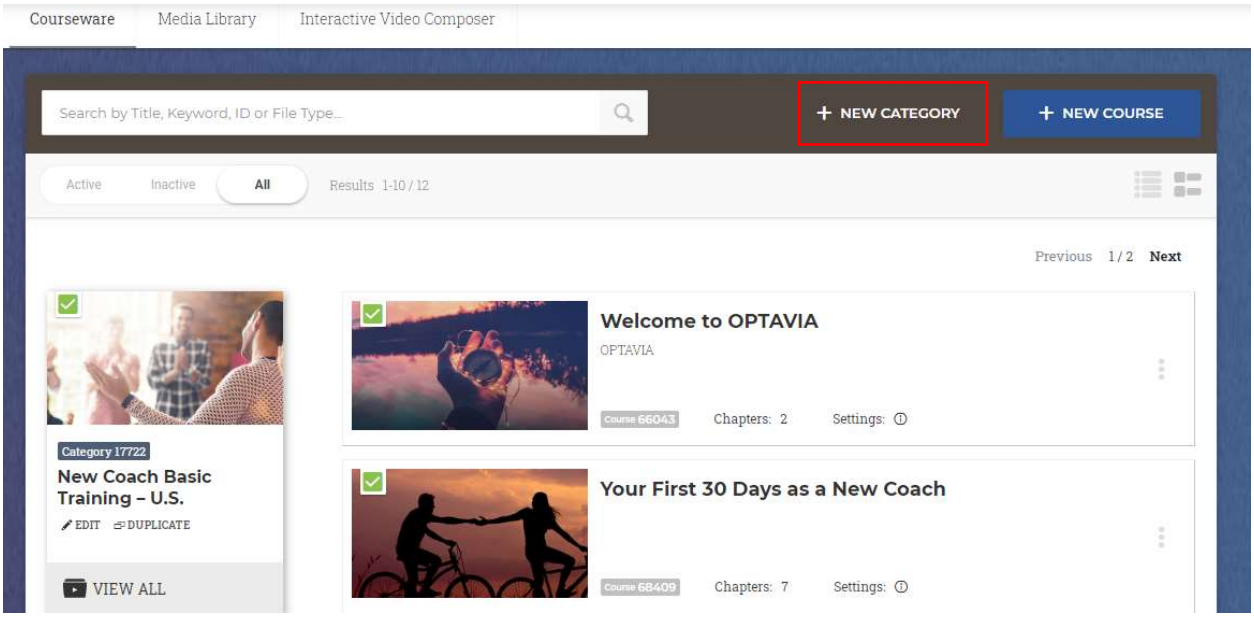


3. From the super user dashboard, click on 'Create/Edit Courseware' from one of two places as shown below.

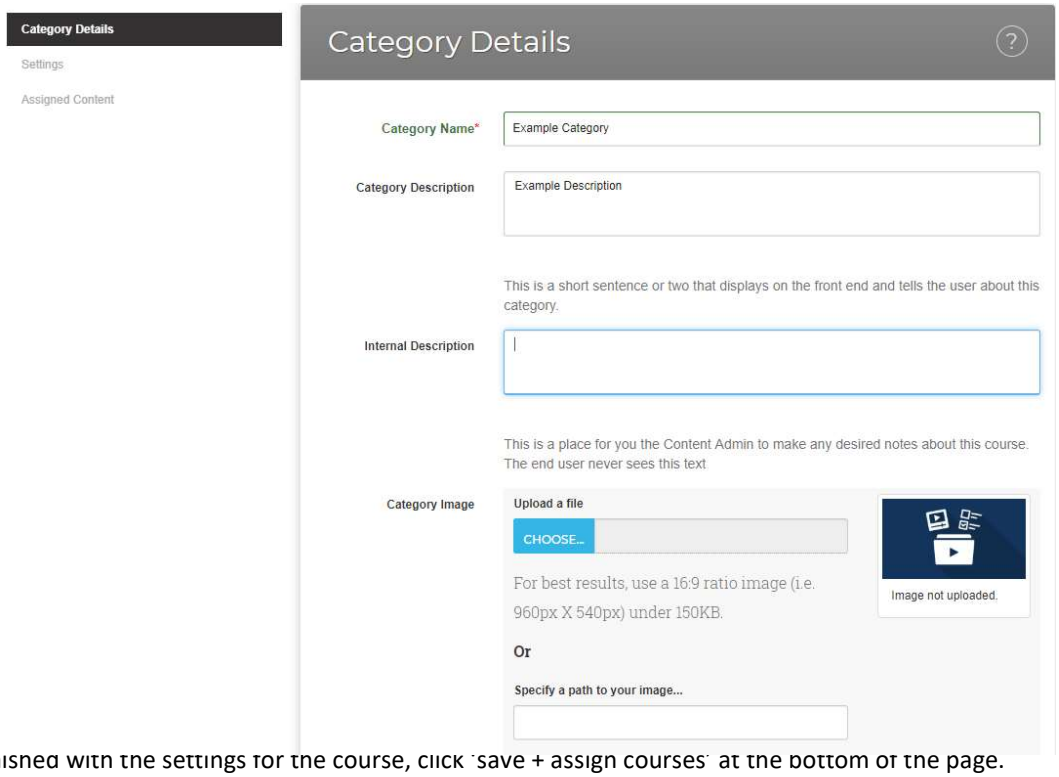


4. In this area you can access all of the current courseware available in the LMS for each market, pending your access level. To add a new category, click 'New Category' from the top right.

   Reminder- any new course or chapter needs to be uploaded into an existing or new category. If an existing category does not fit the chapter/course you are looking to upload, you can create a new category.



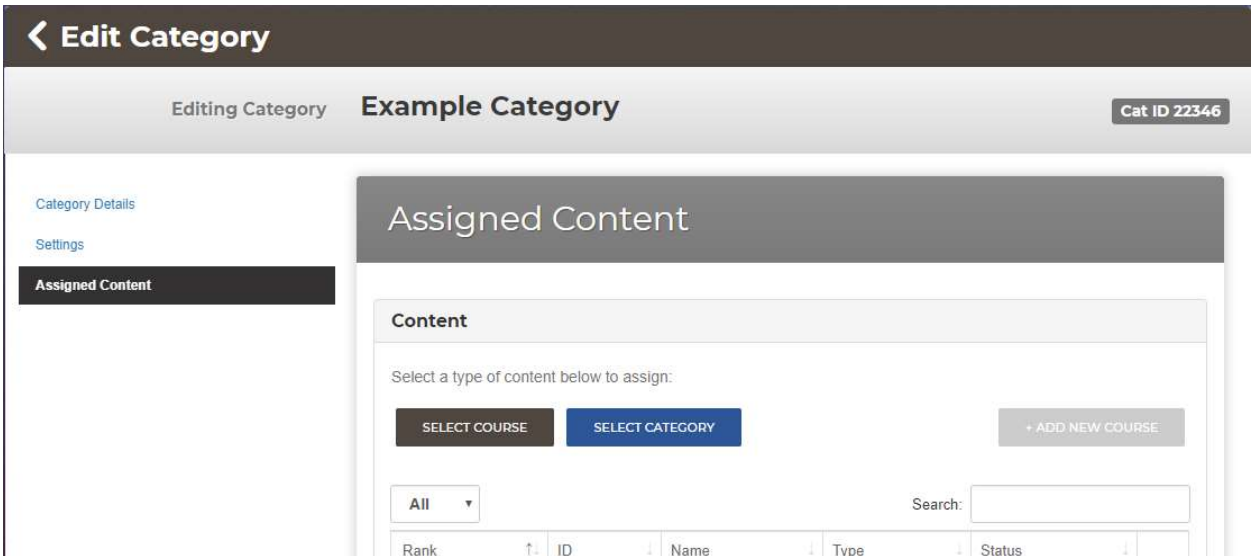
5. From here, you will enter the category details including:
    - Name
    - Category Description (optional)
    - Internal Description (optional)
    - Category image (optional but preferable to include- to be obtained from Creative Request)



When finished with the settings for the course, click 'save + assign courses' at the bottom of the page.



6. This will take you to the category settings, where you can edit the category details as well as add courses. Keep in mind, categories hold courses, courses hold chapters.



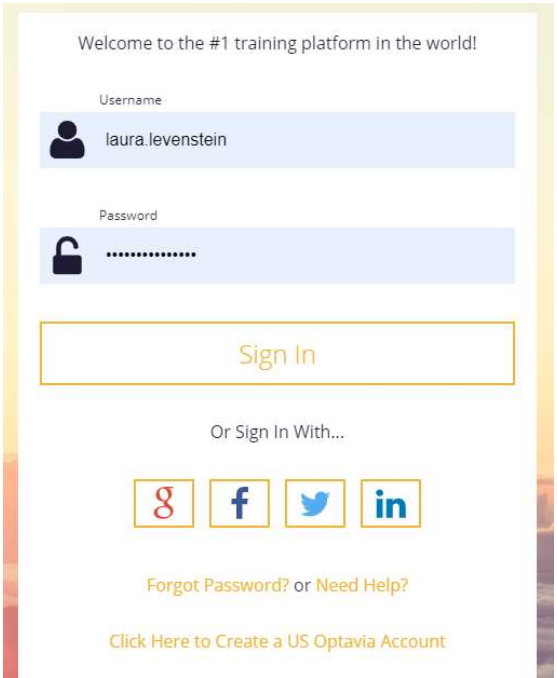
We will learn how to add courses into categories in the next section.

Adding a new Course:

As a reminder, categories hold courses, and courses hold chapters. Now that we have reviewed creating a category, we will review how to add courses to that specific category. Categories can hold multiple courses.

As a reminder, a category is the largest bucket of content within the LMS. Every course that is created has to reside in a category. Each category can contain several courses. You will not be able to put a course or chapter into the LMS if it does not go into a category.

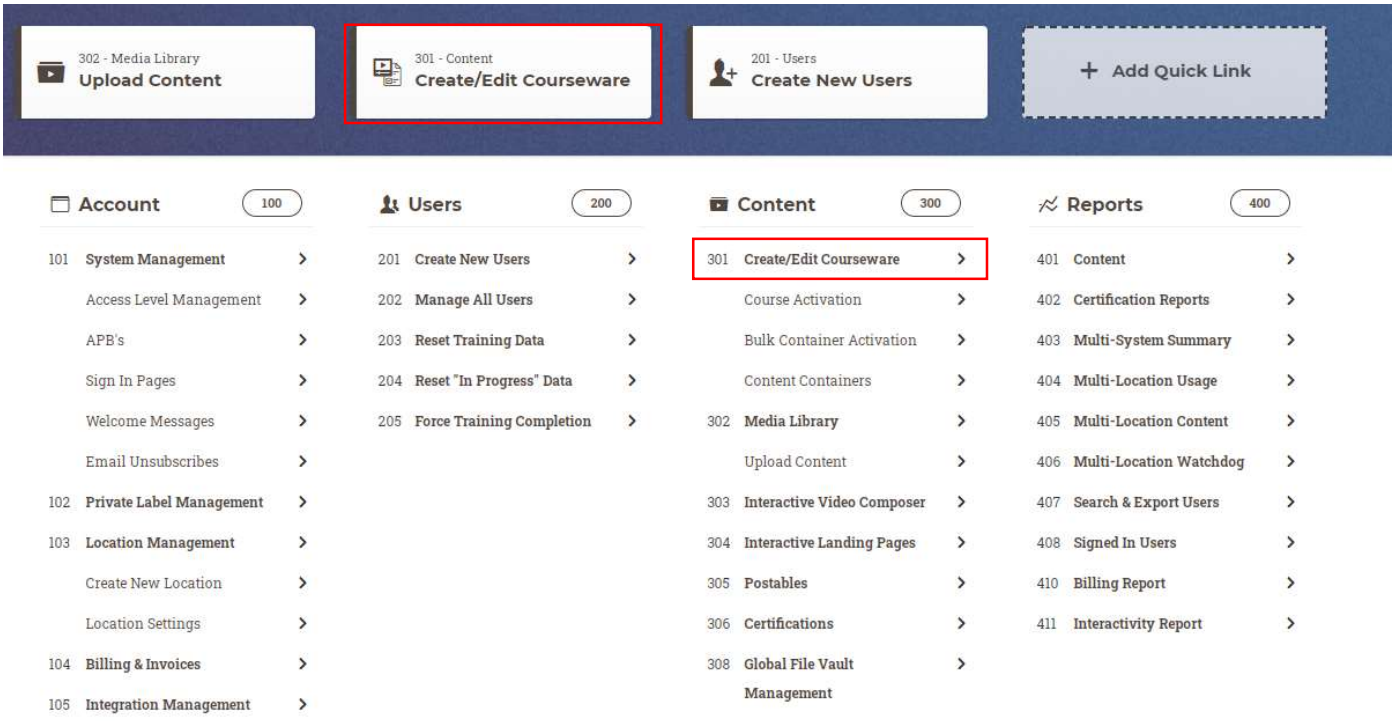
1. Log into the LMS using your administrator credentials.



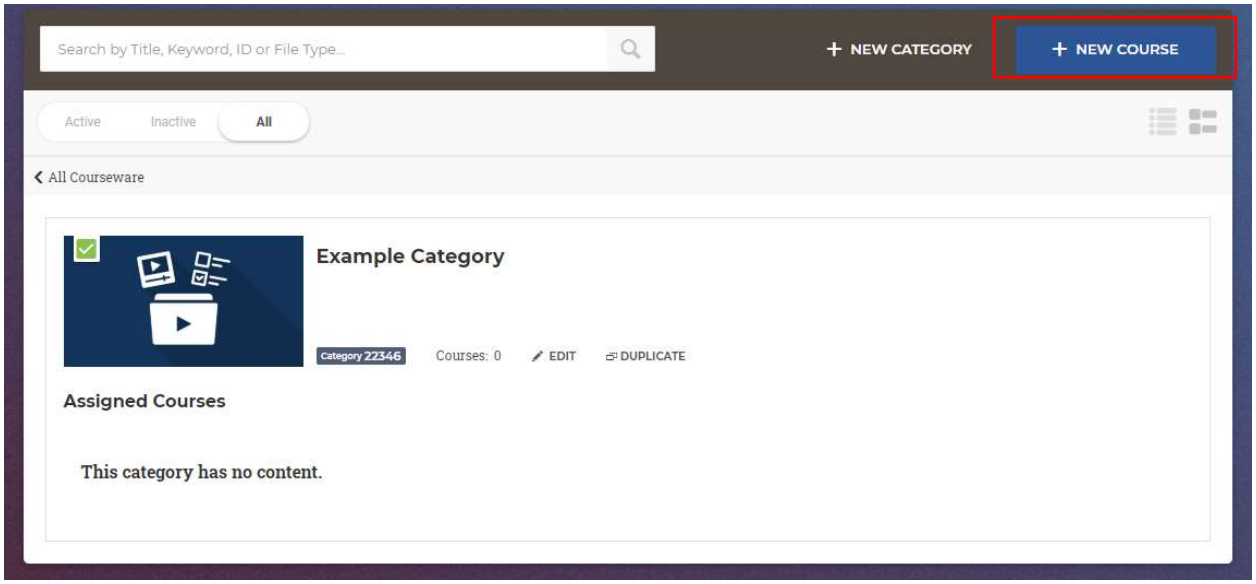
2. Once logged in, click on the ‘super user dashboard’ icon.



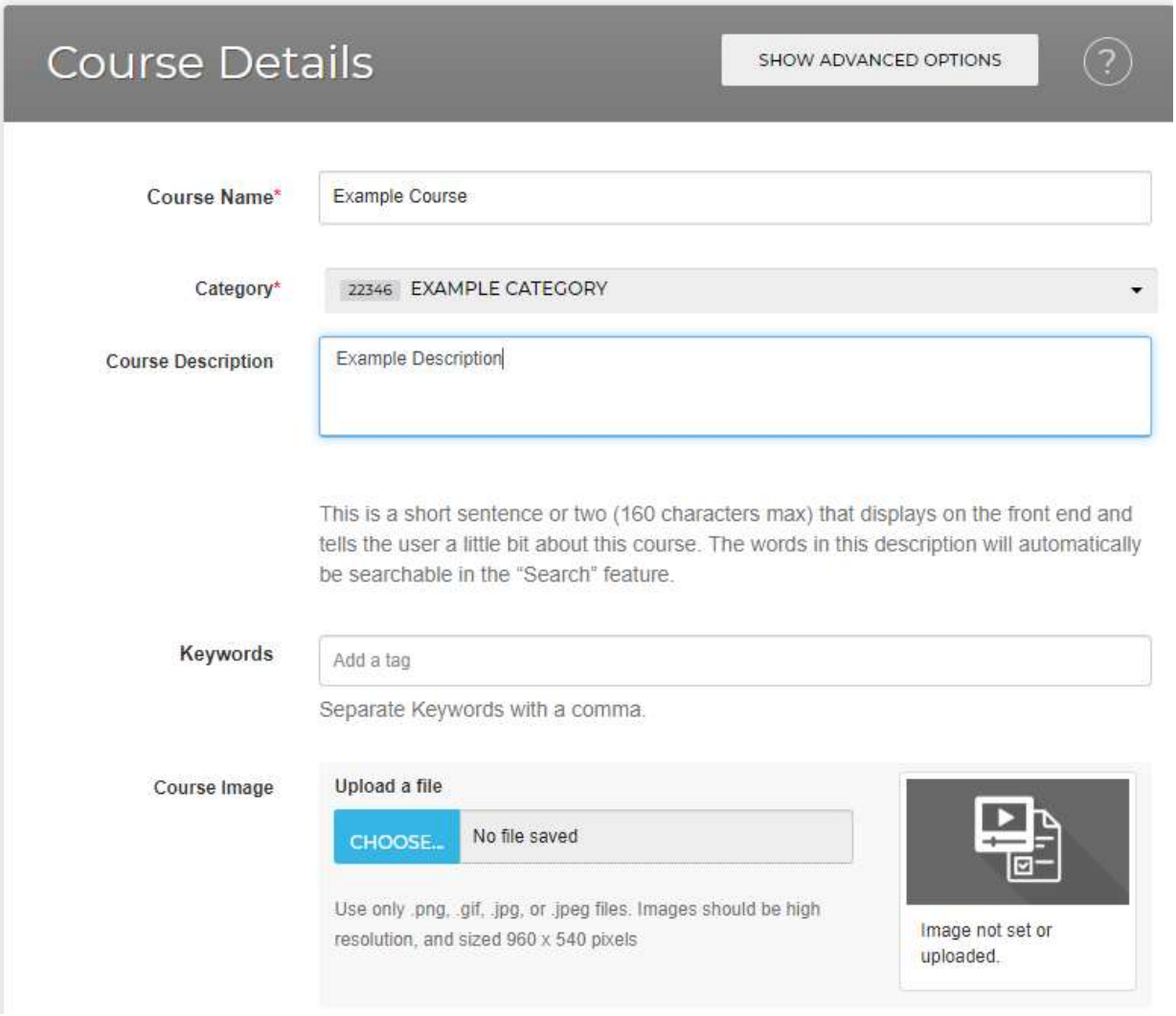
3. From the super user dashboard, click on ‘Create/Edit Courseware’ from one of two places as shown below.



4. From this section, click ‘new course’ at the top of the page



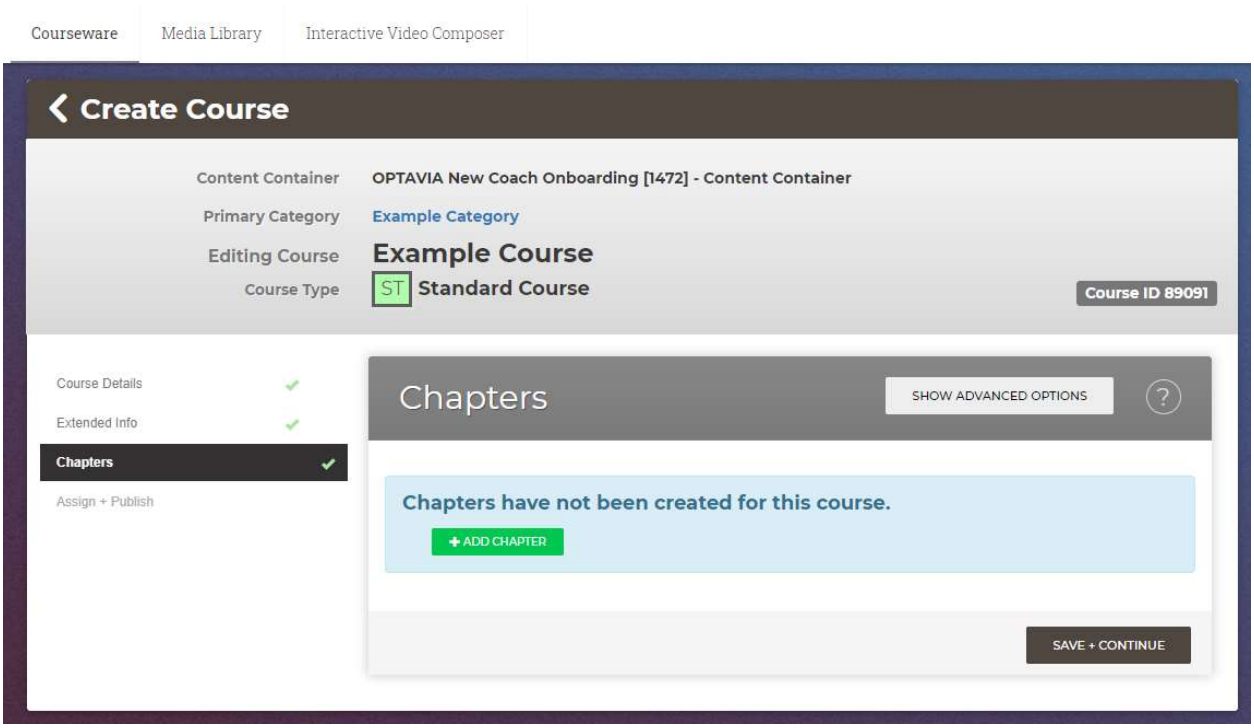
5. From clicking ‘new course’ you will add:
    - The Course Name
    - The Category where the course will reside
    - A course Description (optional)
    - A Course image (optional but preferable to include- to be obtained from Creative Request)



6. After entering in the course information, click 'save and continue'



7. Once you click 'save and continue' you will be brought to the course details where you can edit the details, add chapters, and assign and publish the course. We will review how to add chapters and assign/publish the course in the next section.

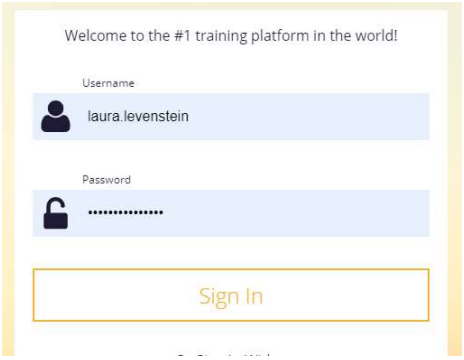


Adding a new Chapter:

As a reminder, categories hold courses, and courses hold chapters. Now that we have reviewed creating a category and a course, we will review how to add chapters to that specific course. Courses can hold multiple chapters.

The content being viewed in the LMS will be in the form of chapters. Chapters need to be added to courses in order to make the course valuable.

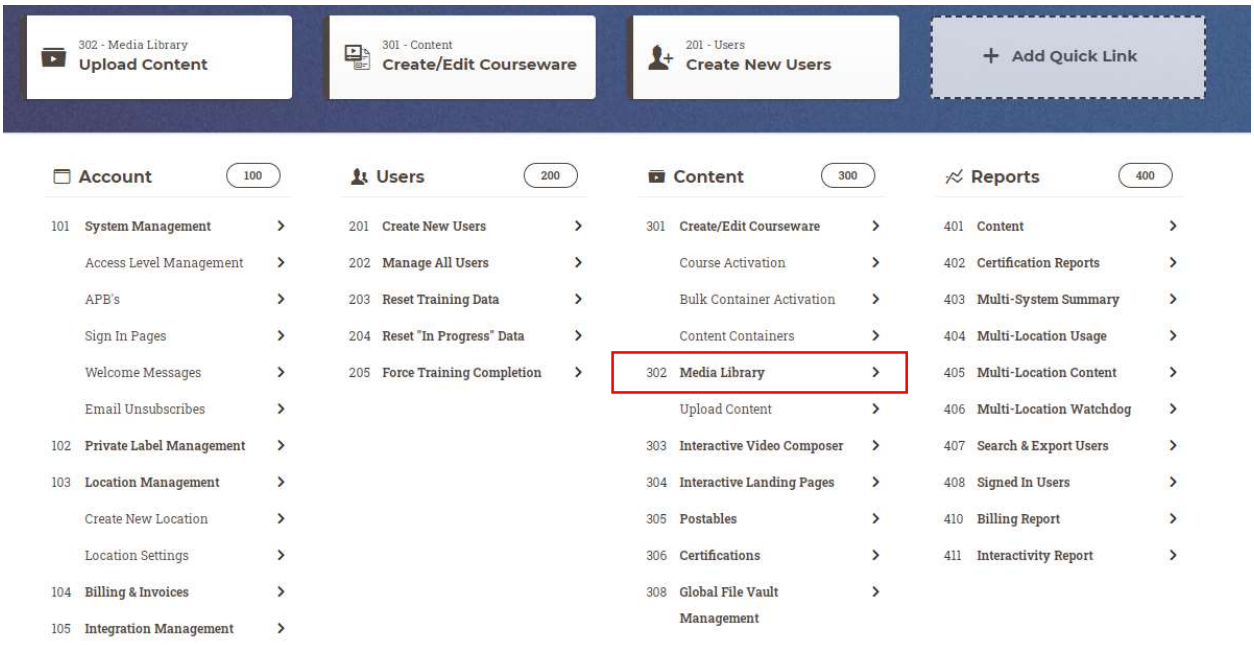
1. Log into the LMS using your administrator credentials.



2. Once logged in, click on the ‘super user dashboard’ icon.

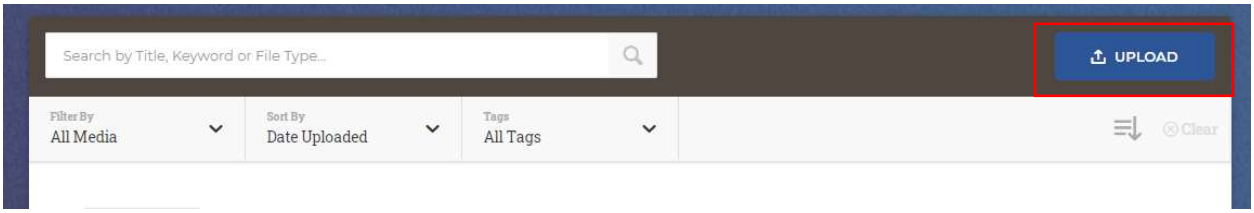


3. Prior to adding chapters to your courses, you will need to put any media into the media library. All video content within the LMS is pulled from the media library within Lightspeed. To add edited video content to the media library, click 'media library' from the super user dashboard:

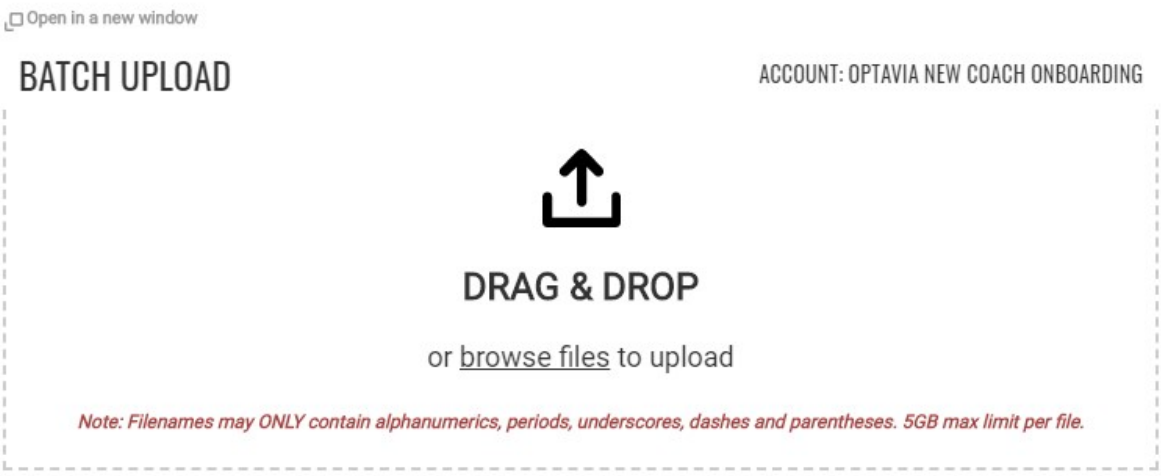


4. The Media Library is where all media within the LMS is housed. There may be videos that are not yet included in chapters within the LMS housed in the Media Library.

   From the Media Library, upload the videos to be included in your chapters by clicking the 'upload' button.



5. When you click 'upload' you will be asked to drag and drop your video into an upload box:

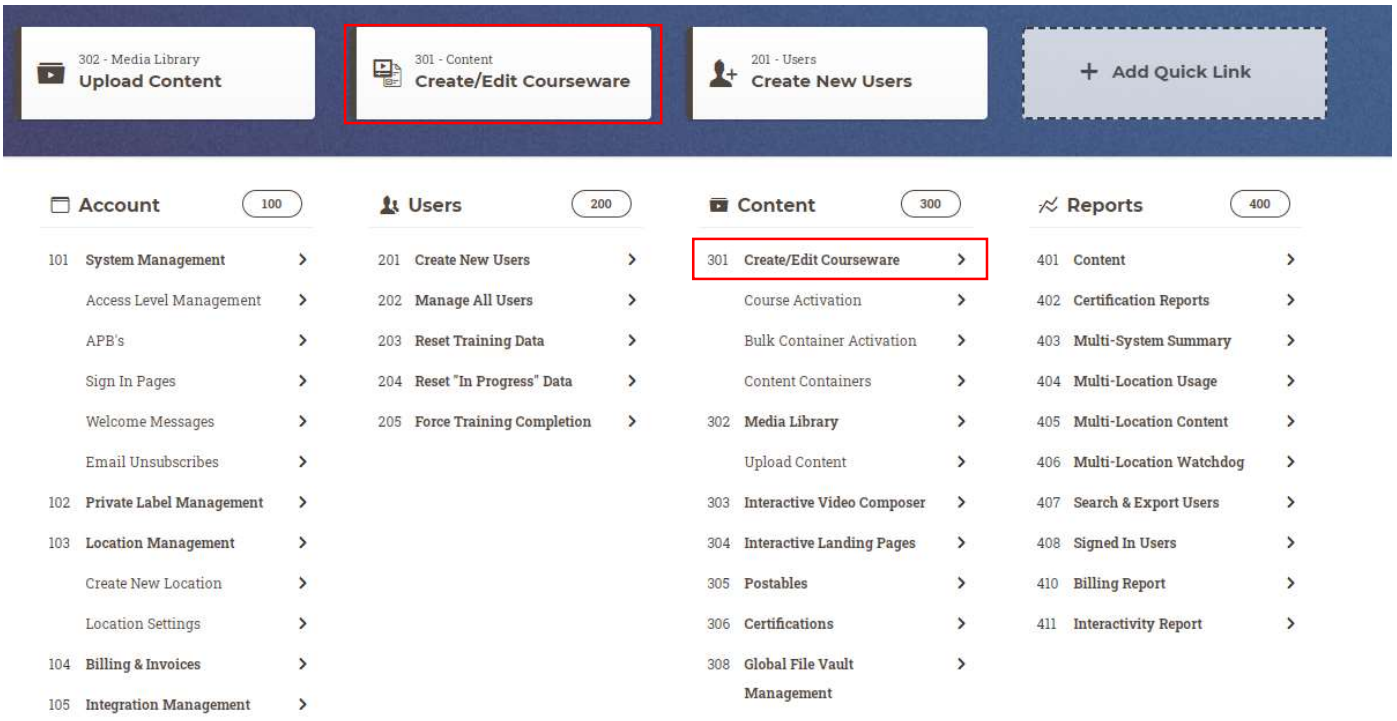


You will be able to drop more than one video/piece of media into the batch upload area. The Media will not be immediately available as it has to convert to all available media outputs. You will be able to check in the Media Library to determine whether the media is ready to be shared in the LMS. If it is ready, the media will have three dots to the right, as shown below:

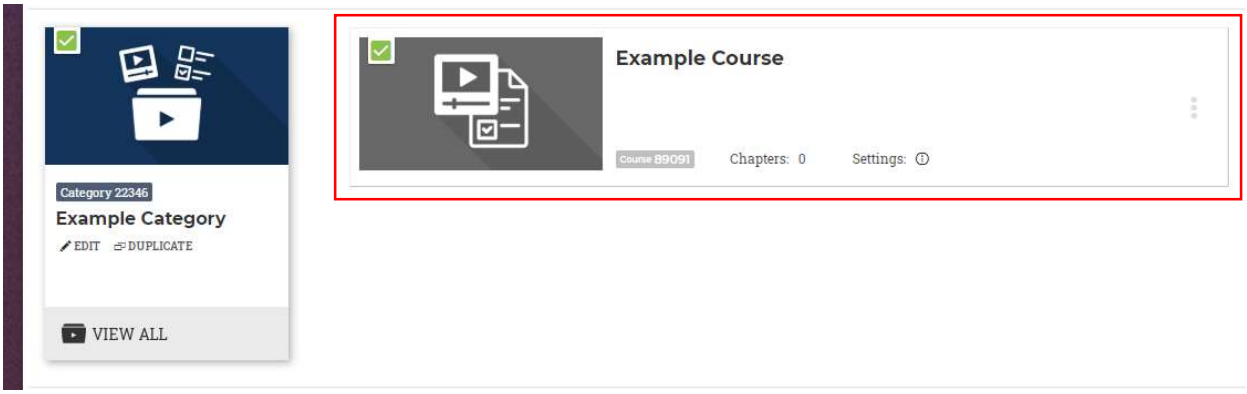


Only proceed to step 6 when your media is ready. It should be converted and ready for use within an hour of uploading to the media library.

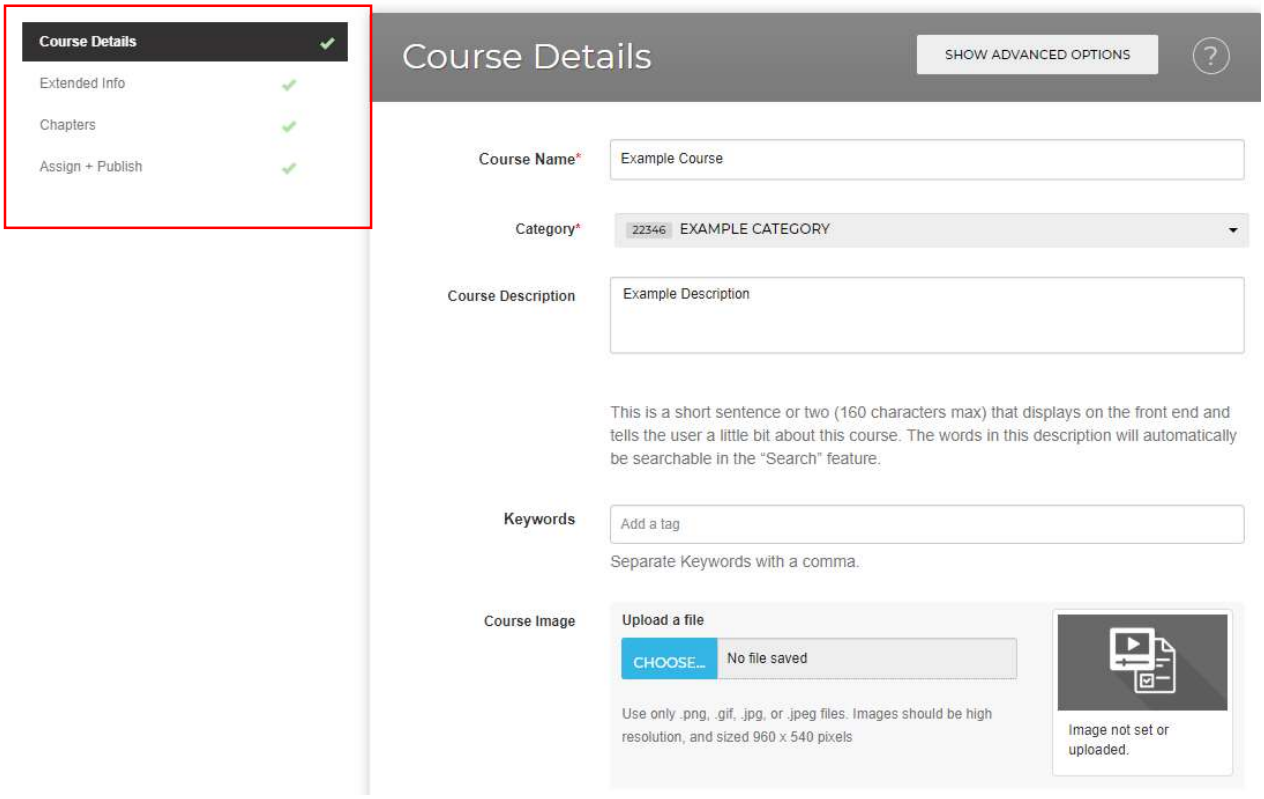
6. From the super user dashboard, click on ‘Create/Edit Courseware’ from one of two places as shown below.



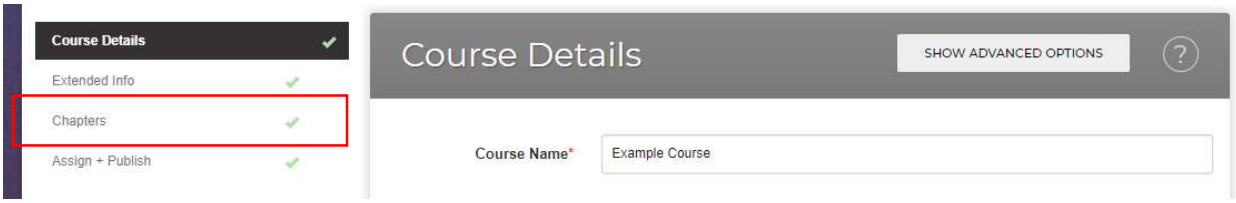
7. Click on the course you would like to add chapters to:



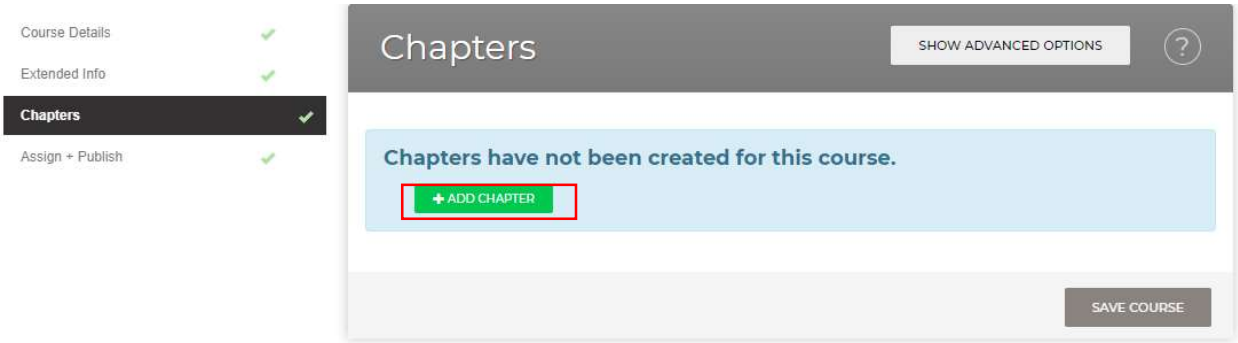
This will bring you to the area where you can add chapters and publish the course.



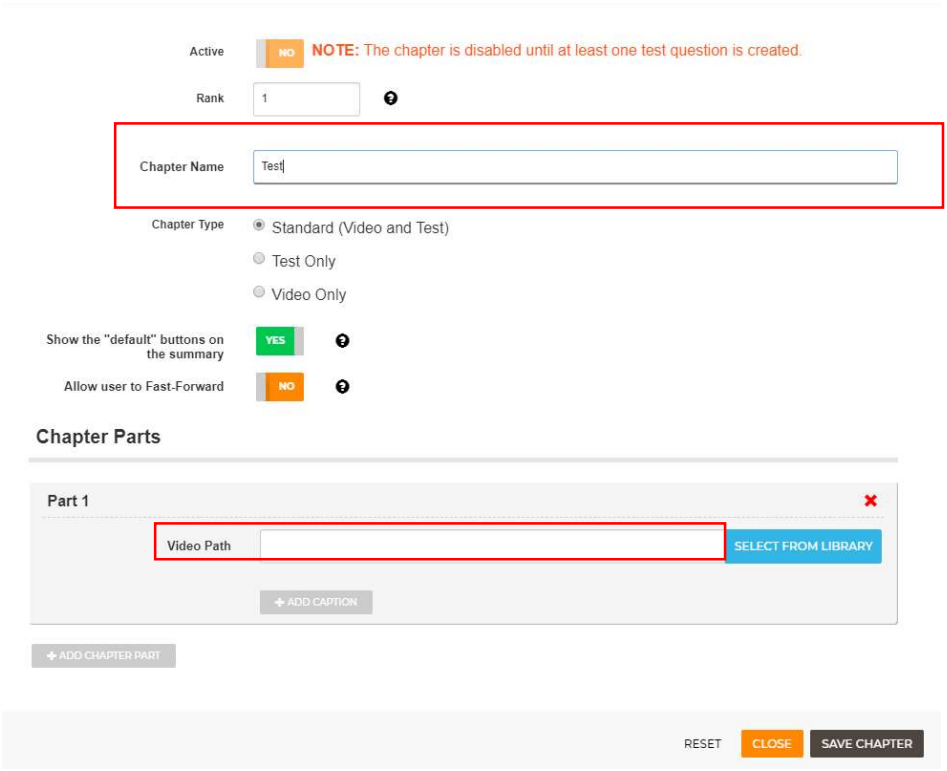
8. Before publishing, you will want to add chapters (your newly uploaded media) to the course. Do this by clicking 'chapters' on the left hand side of the course details:



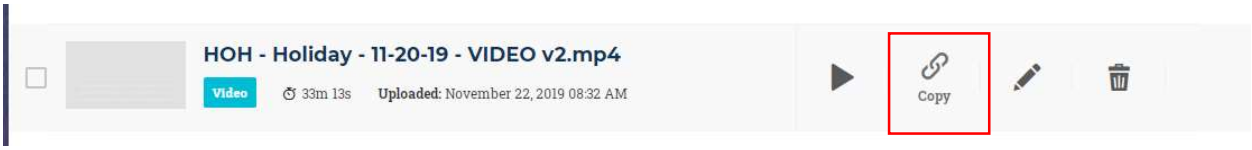
9. Once you click 'chapters' you will be able to add a new chapter from the media library to your course by clicking 'add chapter':



10. When you click' add chapters' you will need to add the chapter name, choose what type of chapter, and add the link to the chapter video. Additionally, if there is a VVT file for captions, you will need to add that separately. This can be downloaded from REV captioning service (in above SOP)
    - Type of chapter can be as follows:
        i. Standard, which includes a video and a test
        ii. Test only, which would only include a test for the user to take
        iii. Video only, which would only include a video for the user to watch



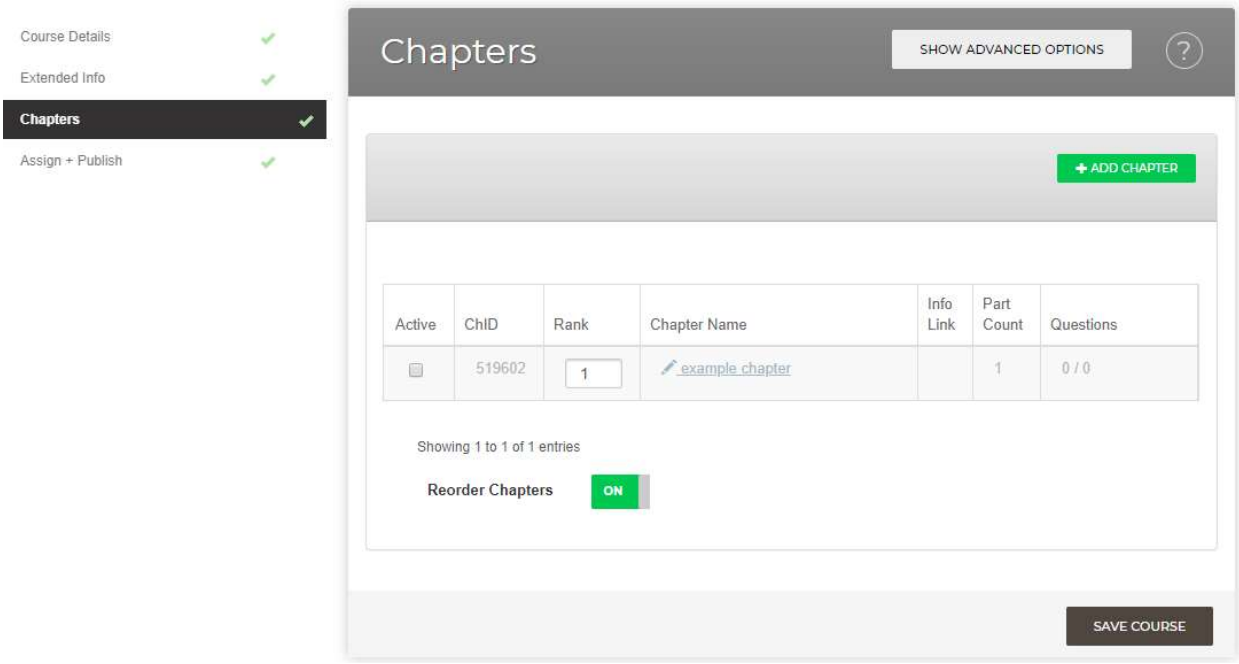
Before adding the link to the chapter, retrieve the link path from the media library by going to the media library, clicking the 3 dots nest to the appropriate media source, and click 'copy'. This will copy the appropriate type of media output for the LMS:



Once the link is copied, you can add the link to the video path in the chapter settings:

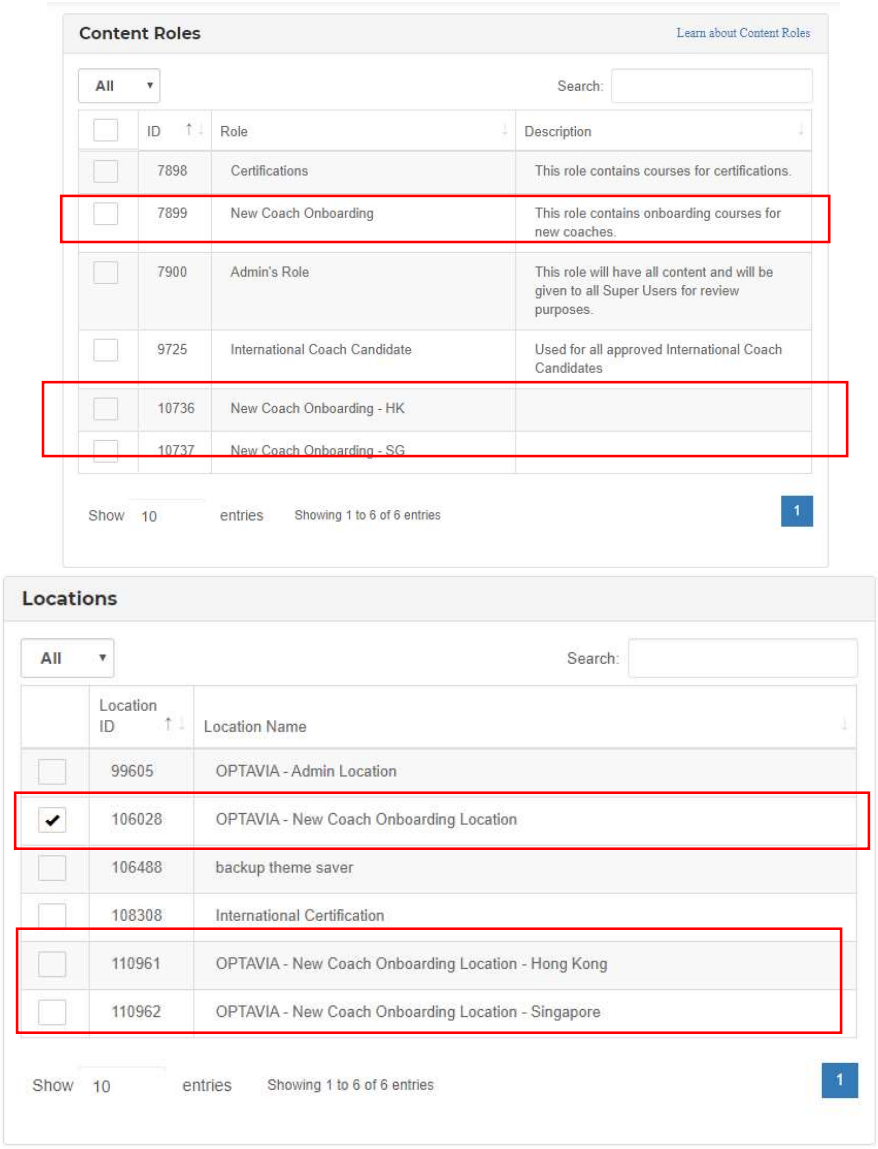


11. Repeat the above steps until each chapter is added. You may have one chapter or multiple chapters depending on the course and the content. :



12. Once all chapters are added, the next step will be to publish. This step will vary depending on which market the content is being published to. Some content created by the Field Training Team will be for only U.S., Hong Kong, or Singapore, where as some might be for all markets.

    When you click on assign and publish, you will be asked to assign to locations and content roles:



Depending on the audience for the content, you will assign to the appropriate market by checking the box next to the market location. **Keep in mind, if you are publishing content to Hong Kong or Singapore Markets, be sure to link the correct video content as well as VVT file for captioning purposes.** Once you have assigned the course, go into the specific market as a user to confirm the content is available and correct.

SOP: Pulling Usage Reports in Lightspeed

Objective:

To pull usage data for all for all course chapters in Lightspeed.

This procedure is to be completed bi-weekly (every other Friday) and added to the Training Dashboard.

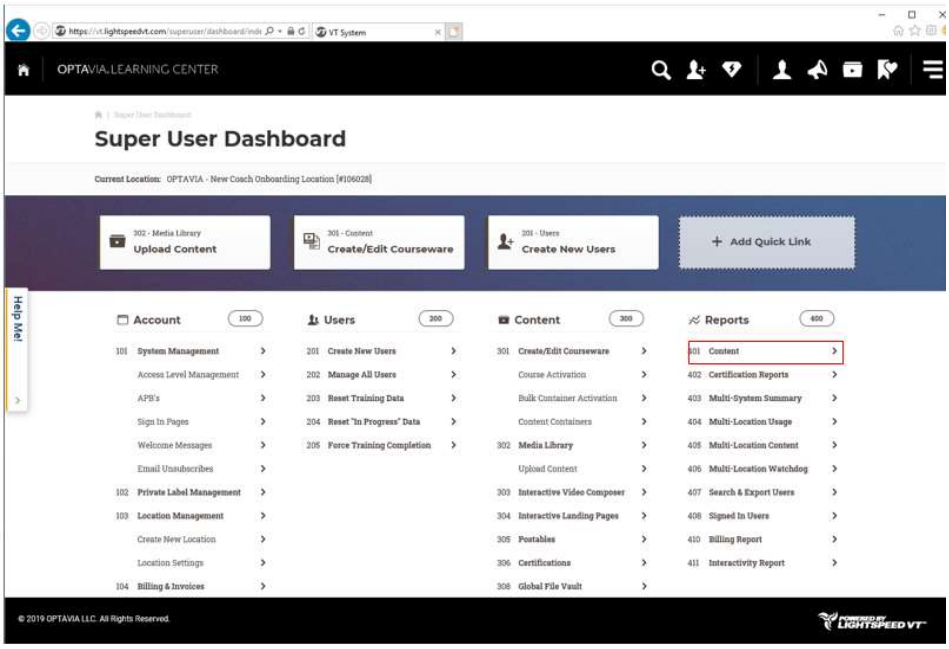
Accessing the Content Report:

11. To begin, log into the LMS using your administrative username and password. If you do not have an admin login, you will not be able to pull a usage report.

12. Once logged in, click on the **diamond** icon at the top right of the page. This will direct you to the Super User Dashboard of the LMS.



13. Under the Reports section, click **Content.**



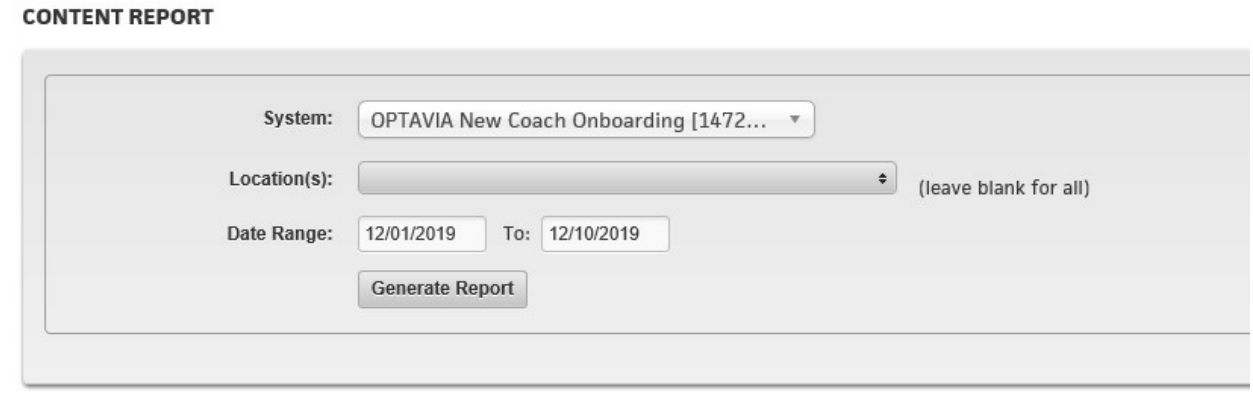
Set the Report Parameters:

1. The System section should automatically populate to **OPTA**VIA New Coach Onboarding. If not, select it from the drop-down menu.

2. Unless you are searching for a specific location (U.S., Hong Kong, or Singapore), leave the location blank to search all.

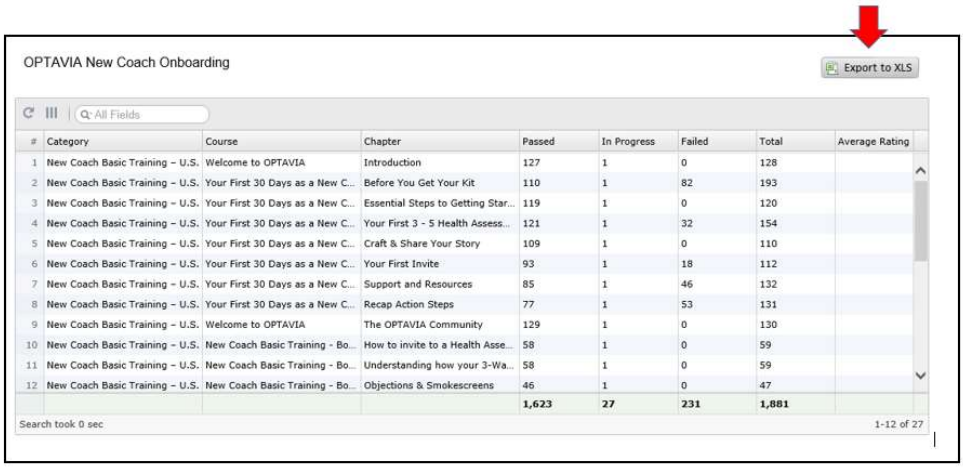
3. Input the date range for your request.

4. Click **Generate Report**.



View and Export Data:

1. The results will be displayed at the bottom of the screen. Export the data to a spreadsheet, click **Export to XLS**.



When viewing the report, there are several terms to be aware of:

Category: This is the largest bucket of content within the LMS. Every course that is created has to reside in a category. Each category can contain several courses.

Course: This is the second largest bucket of content within the LMS. Every chapter that is created resides in a course, which resides in a category. Each course can contain several chapters.

Chapter: This is referring to the individual videos/modules within the LMS. Every chapter is housed in a course, which resides in a category.

The categories are broken down by topic. Each category (topic) then has finer topics within them called courses. These courses then contain either one or several chapters (or videos).

Example:

Category: *New Basic Training*

Course: *Welcome to* ***OPTA****VIA*

Chapters: *Chapter 1: Introduction. Chapter 2: The* ***OPTA****VIA Community*

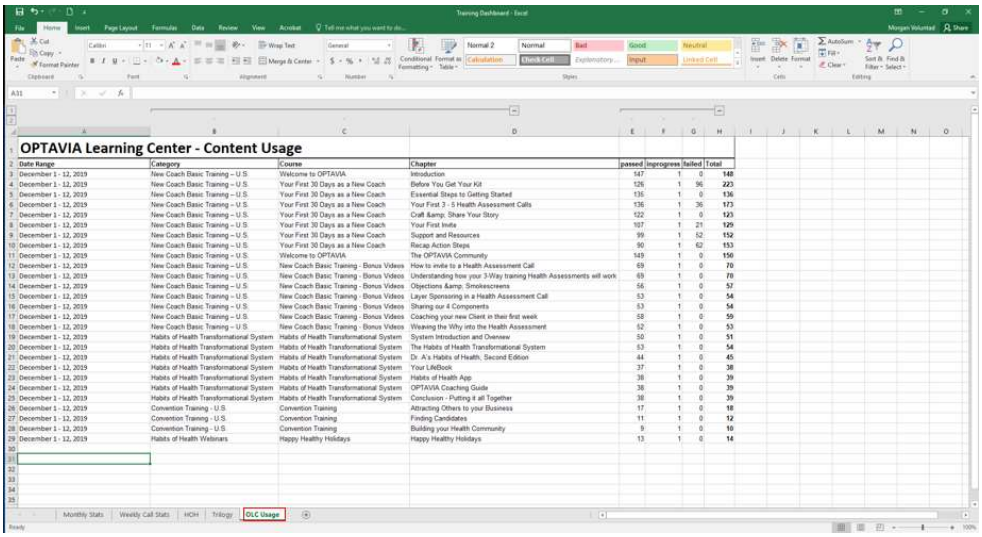
Passed: Indicates that the user has successfully completed the chapter and chapter exam.

In Progress: Indicates that the user has begun but not yet completed the chapter.

Failed: Indicates that the user did not complete the chapter exam with a passing score (80% or above). If the Fail rate is 0, it is likely that an exam is not assigned to that course.

Total: The total number of users that have participated in the course within the designated date range.

2. Add the data to the OLC Usage tab in the Training Dashboard. Make sure to skip a row under the existing data when adding the new data to the sheet. That extra row in between has data on the total column.



SOP: Pulling User Reports in Lightspeed

Objective:

To pull total number of users in Lightspeed.

This procedure is to be completed bi-weekly (every other Friday) and added to the Training Dashboard.

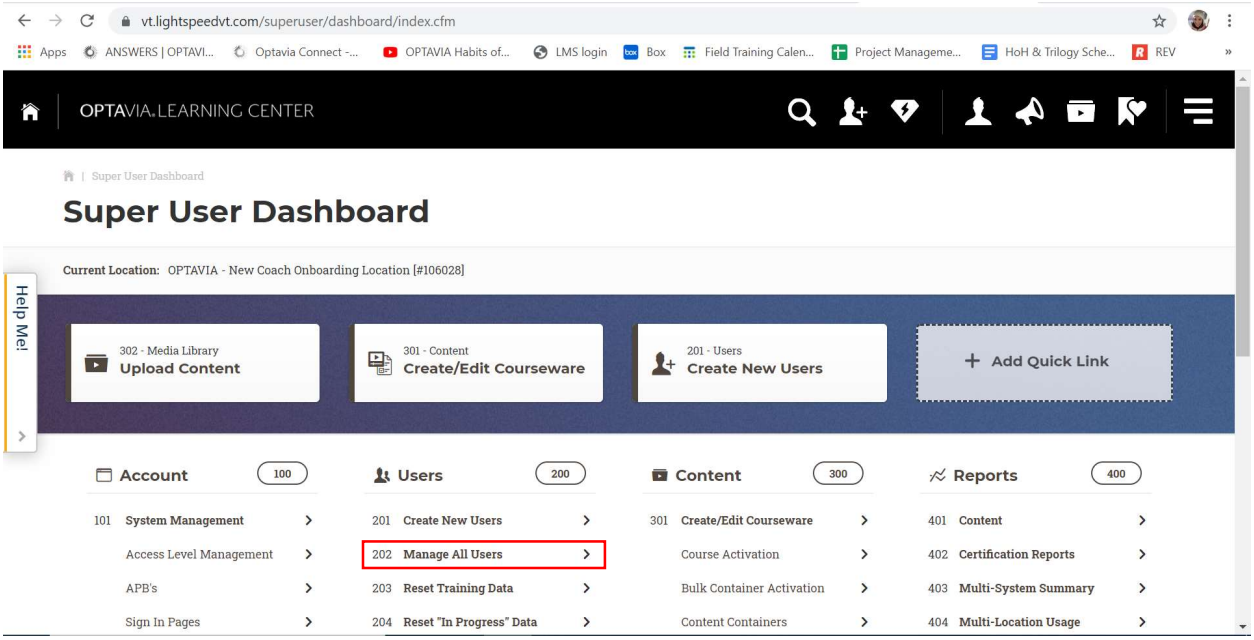
Accessing the User Report:

14. To begin, log into the LMS using your administrative username and password. If you do not have an admin login, you will not be able to pull this data.

15. Once logged in, click on the **diamond** icon at the top right of the page. This will direct you to the Super User Dashboard of the LMS.

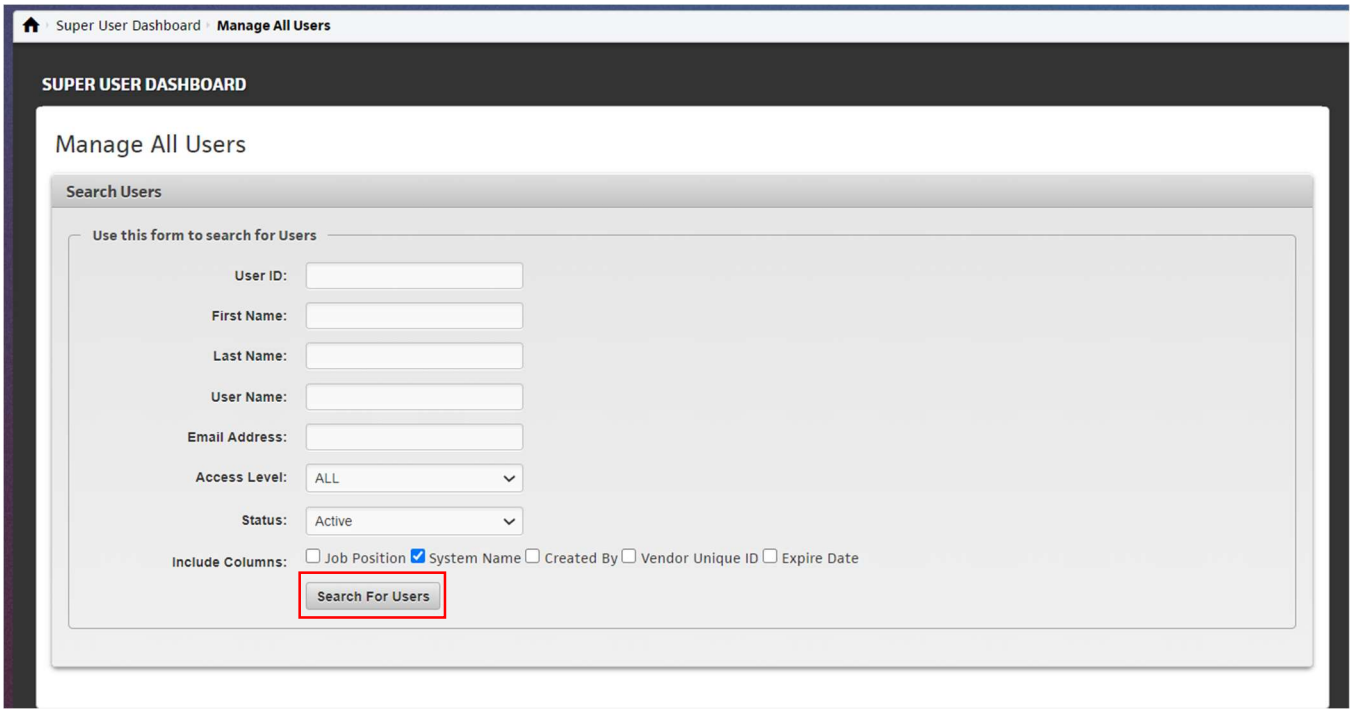


16. Under the Users section, click **Manage All Users.**



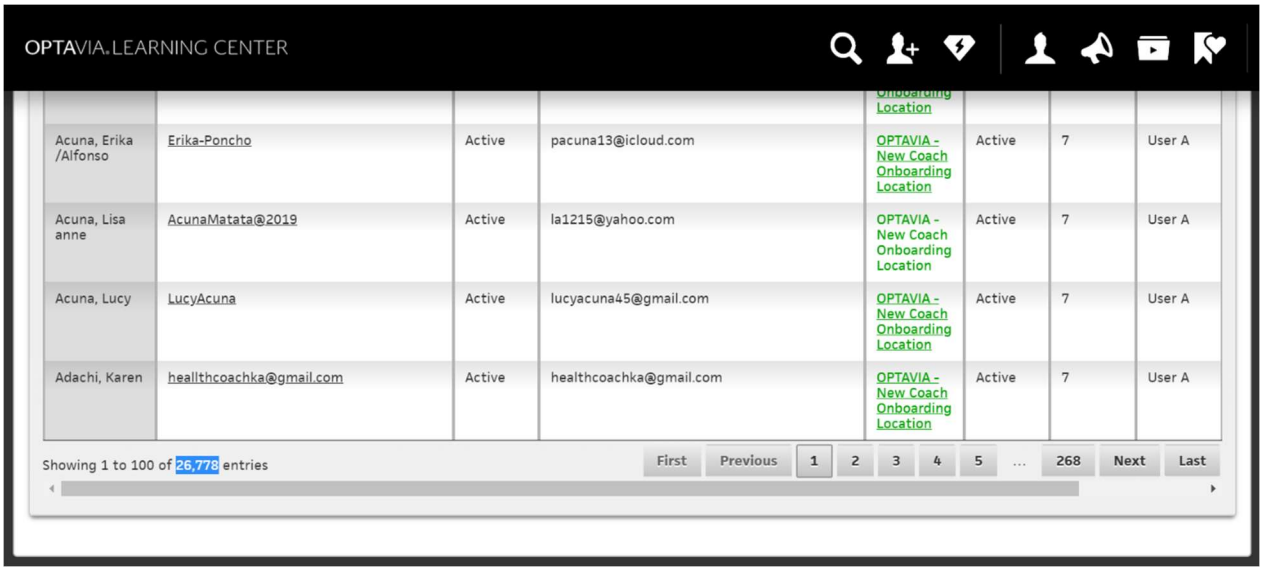
Set the Report Parameters:

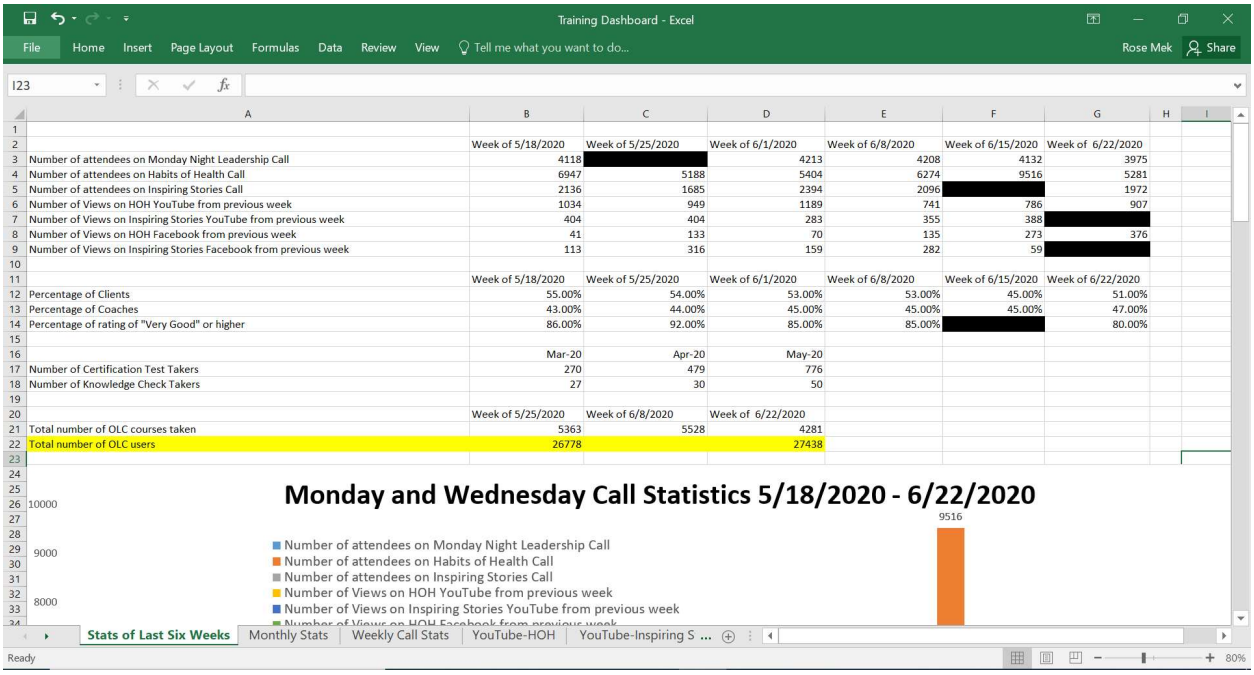
5. Leave all fields as is and click **Search for Users**.



View and Record Data:

3. Scroll to the bottom of the screen and record the total number of OLC users in the Stats of Last Six Weeks tab in the Training Dashboard.





		Week of 5/18/2020	Week of 5/25/2020	Week of 6/1/2020	Week of 6/8/2020	Week of 6/15/2020	Week of 6/22/2020
3	Number of attendees on Monday Night Leadership Call	4118	[redacted]	4213	4208	4132	3975
4	Number of attendees on Habits of Health Call	6947	5188	5404	6274	9516	5281
5	Number of attendees on Inspiring Stories Call	2136	1685	2394	2096	[redacted]	1972
6	Number of Views on HOH YouTube from previous week	1034	949	1189	741	786	907
7	Number of Views on Inspiring Stories YouTube from previous week	404	404	283	355	388	[redacted]
8	Number of Views on HOH Facebook from previous week	41	133	70	135	273	376
9	Number of Views on Inspiring Stories Facebook from previous week	113	316	159	282	59	[redacted]

		Week of 5/18/2020	Week of 5/25/2020	Week of 6/1/2020	Week of 6/8/2020	Week of 6/15/2020	Week of 6/22/2020
12	Percentage of Clients	55.00%	54.00%	53.00%	53.00%	45.00%	51.00%
13	Percentage of Coaches	43.00%	44.00%	45.00%	45.00%	45.00%	47.00%
14	Percentage of rating of "Very Good" or higher	86.00%	92.00%	85.00%	85.00%	[redacted]	80.00%

		Mar-20	Apr-20	May-20
17	Number of Certification Test Takers	270	479	776
18	Number of Knowledge Check Takers	27	30	50

		Week of 5/25/2020	Week of 6/8/2020	Week of 6/22/2020
21	Total number of OLC courses taken	5363	5528	4281
22	Total number of OLC users	26778		27438