

This document provides Microsoft Software Assurance Benefit Administrators with best practices for implementing e-learning through the Microsoft Online Learning Portal.

IMPORTANT NOTE: Please do not access or launch courses on the new site until you are notified your organization has migrated. Doing so may cause data discrepancies in your e-learning entitlements and any course progress will be lost.

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Online Learning Portal best practices guide

Choosing the Online Learning Portal as your deployment option

The Online Learning Portal provides two distinct functionalities—[Business Portal \(Administrator access\)](#) and [Learner Portal \(student access\)](#).

Business Portal (for Administrators)

The Online Learning Portal is where Microsoft Volume Licensing customers with Microsoft E-Learning access can manage their Microsoft E-Learning products. Microsoft clients who report on e-learning consumption and who track learner progress use the Online Learning Portal to meet those needs. In addition to reporting, Administrators on Online Learning can create targeted learning plans to streamline professional development of specific groups of learners.

An Online Learning Administrator can:

- Manage e-learning access for learners.
- Create and assign learning plans to employees or groups.
- Track learning benefit consumption and training progress across the organization.

Learner Portal (for students)

The Learner Portal is where Microsoft Online Learning students access e-learning courses available to them.

NOTE: To access the Online Learning Portal—either the Administrator or the Learning functionality—a Microsoft account (formerly Windows Live ID) is required.

BEST PRACTICES

After you have decided to use the Online Learning Portal for your e-learning needs, it is recommended that you continue to use only the Online Learning Portal for ongoing e-learning management.

You should either choose to distribute access codes obtained from [the Volume Licensing Service Center \(VLSC\) site](#) or to distribute access codes and/or assign learning plans from the Online Learning Portal. *It is not necessary to do both.*

Setting up learner accounts

There are two ways for learner accounts to be created in the Online Learning Portal. They can be created via access codes (which are distributed to learners allowing them to self-register), or they can be imported into Online Learning and then assigned a learning plan. In the latter case, learners receive an activation email requiring them to click an activation link. This maps their Online Learning learner account to their Microsoft account.

BEST PRACTICES

If you set up learner accounts via the import process, you can then assign them to learning plans. You do not need to use access codes.

If you create access codes on the Online Learning Portal and distribute the codes to users (which allows them to self-register on the Online Learning Portal), you will not use the import process to create accounts.

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Planning for learning plans

Learning plans are specific sets of e-learning courses that guide learning for your users. Administrators with the Manage Learning Plans privilege can create, edit, and assign customized learning plans. Learning plans can be assigned directly to individual learners or to the groups that you have already established. Learning plans can also be assigned via Online Learning access codes. Redemption of the access codes allows learners to self-register.

BEST PRACTICES

Before creating learning plans, you should first do some planning and make decisions regarding:

- **Targeted audience.** Identify the specific learners or groups of learners who are appropriate for each learning plan.
- **Relevant content.** Determine which content is most relevant for the specific audience for each learning plan.
- **Management buy-in.** Obtain management approval to ensure the success of the overall training program.
- **Marketing strategy.** Promote your training program by mapping to organizational objectives.

Establishing targeted audience

As a first step in managing the training and development of your organization, you should establish the various training audiences within your organization. To do this, determine training needs, based on the professional development plan for the various groups within your organization. They should map to the overall training and development objectives of your organization. You can then establish a group structure hierarchy and build learning plans around those groups to meet the specific training needs.

Determining relevant content for each audience

After you have established a group structure to identify targeted audiences within your organization, you can work to build out learning plans to target specific content for learners within those groups.

One way to identify relevant content is to define the job skills for your organization. Job skills are competencies necessary to perform in a job and can be mapped to courses which can then be the basis for a learning plan. Completion or mastery of the courses and/or resources can indicate competence to perform a specific job.

Management buy-in/Managers and Executives become Program Champions

A critical component to the success of any training program is management acceptance and support. This ensures that management will promote training for personnel within all departments throughout the organization. You can also consider making Managers and Executives within your organization the Program Champions to help organize and drive a successful training program.

Adopt a Marketing Strategy, with program success criteria and business objectives

Your Marketing Strategy should include components which promote the business objectives and criteria of the program to ensure the overall success of your e-learning program. Some of the key components in your marketing strategy include:

- **Relevance.** Establish the overall relevance of the training program.
- **Objectives.** Map individual objectives to departmental objectives which ultimately drive the overall company objectives for personnel training and development.
- **Goals.** Establish goals with timelines for training that map to individual performance plans and are promoted by management.

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Establishing groups

A group structure can be built to define targeted audiences based on training needs within your organization. Quite often, a group structure for learning will map to the structure of your organization. The group structure can be made up of a hierarchy of both parent and child groups, similar to an organizational hierarchy. After it is established, groups can be used to assign personnel to appropriate learning plans and can aid in reporting.

BEST PRACTICES

The group naming convention should be logical for the personnel of your organization. You should always create groups *prior* to beginning work on learning plans.

See the following samples of group structures that can be created on the Online Learning portal:

Sample 1. Single level:

- Facilities
- Finance
- Human Resources
- Legal
- Marketing
- Operations
- Sales

Sample 2. Multi-level:

- Facilities
- Finance
 - Billing
 - Payroll
- Human Resources
- Legal
- Marketing
- Operations
- Sales
 - Northeast
 - Northwest
 - Southeast
 - Southwest

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Creating learning plans

You should map learning plans to the strategic objectives of your organization for each specific audience/group of targeted learners. By doing so, you ensure that the professional development of your employees/learners works toward the continued strength and growth of your overall business.

BEST PRACTICES

Establish a naming convention for your learning plans. An appropriate naming convention for each learning plan has meaning/recognition for the targeted learners. Note, as an example, that the sample learning plan contains targeted learning for the Operations Team within the organization.

Also, it's important to use learning plans to provide learners with a subset of content that is logical for the targeted training for each specific group of learners. The sample learning plan that follows is specific to Project Managers within the Operations Department.

Sample learning plan

Manage learning plan

To remove a course, look under Courses in learning plan and click Remove.
To add courses, click Browse or Search.

0 Added 0 Removed 7 Total (50 max.)

The screenshot displays the 'Courses in learning plan' section of the Online Learning Portal. At the top, there are tabs for 'Browse courses' and 'Search'. Below this, a list of three courses is shown, each with a 'Remove' button. The courses are:

- コース 4961: インターネット プロトコルによる Exchange Server 2003 クライアント アクセスの実装と管理
- 課程 10581: Microsoft Word 2010 初學者技能
- 課程 10592: Microsoft PowerPoint 2010 初學者技能

Below the list, there is a section for the learning plan name, labeled '* Learning plan name'. The name 'SA Test Learning Plan' is entered in the text box. At the bottom, there are 'Save' and 'Cancel' buttons.

For additional information on all the functionality of the Online Learning Portal, see the [Online Learning AdminGuide](#).

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