Product Requirements Document

**WLGA E-Learning Platform Study**

# 1 Aims

To identify key improvements that are required by Local Authorities (LAs) in Wales for the Learning@Wales (L@W) platform to be a workable solution for their learning and development needs.

# 2 Background & strategic fit

The L@W platform has been developed by NHS Wales and is free for LAs in Wales to use. There are currently over 79,000 users registered on the L@W platform, 18,300 of which have been active on the platform in the last 12 months, and it holds over 300 NHS and Welsh Government training courses and over 200 local authority developed training courses.

Some LAs have adopted the platform, while others have chosen no g staff take the appropriate mandatory courses and provide support for staff to do this. At an LA this can be thousands of employees, agency staff, councillors and even schoolteachers. When bugs (e.g. missing completion records) and usability issues arise with the platform, this ends up being a lot of manual work for staff. There is always a concern with compliance and ensuring that all staff have taken mandatory courses, so there needs to be trust with the data in the reports. This is not the case in many LAs.

**Note that further challenges exist with the help desk support. Many users here reported not being able to use the reports features for themselves, nor have they been able to get a response when they have requested help.**

* **End users (staff)** - These are the people taking the courses on the platform. This is a diverse group of people, but we are most concerned about the platform working for users with limited digital skills and confidence. Many of these users may not have access to a computer or do not use one for their day-to-day work e.g. a carer, those working in the highways or refuse collection teams. For these users, a usability issue that may not seem severe to someone with good computer skills, can mean that this type of user is unable to take courses on the platform.

**Note that much of the feedback for requirements in this doc is second hand from the other user groups. This should be addressed with further user research.**

* **Course creators** - This user group is responsible for creating the content for courses and in some cases running training sessions. They have had to adapt during the pandemic, for instance, group training sessions are now done via Zoom and recorded for future viewing. Broadly, they like the concept of e-Learning and how well users have taken to it, but there are some challenges with usability and the functionality limiting their ability to provide good quality, interactive training courses that provide the best experience and opportunity to learn.

# 4 Product strategy

A high-level product strategy was developed based on the findings using the OGSM framework.

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| **Objectives**  To improve the L@W platform so that it meets the needs of the different LA user groups. | **Goals**   * Increase uptake of the platform by LAs not currently using it * Prioritise missing functionality that HR and Admins require * Address usability issues with the platform * Provide appropriate training (via the platform!) and share best practices for use across LAs * Improve help desk support for LAs | |
| **Strategies** | **KPIs** | **Tactics** |
| 1. Develop functionality that HR and platform admins require to be compliant with staff training reporting | * # manual reports reduced * HR and admin satisfaction * # of queries to Helpdesk reduced | * Develop an API for reports data to be automatically sent to the HR platforms that LAs use e.g. iTrent * Develop a process for how to manually transfer information between platforms with training and sample templates * Improve interface for tracking completions |
| 2. Develop missing functionality so that HR and admins can be self sufficient | * # of queries to Helpdesk reduced * HR and admin satisfaction | * Enable admins to reset user passwords themselves * Improve ease of access to specific information / data * Improve on-boarding user journey |
| 3. Improve usability of the platform to reduce issues that require HR/Admins and Helpdesk to intervene | * Staff satisfaction * # of queries to Helpdesk reduced | * Improve choice architecture so that users only see options and actions that they should be using * Improve how the platform works different browsers and device types * Improve user journey for taking courses |
| 4. Improve learning for how to use the platform | * HR and admin satisfaction * Content creators' satisfaction | * Developing training for HR/Admins via L@W for users to access whenever they need * Improve knowledge sharing and best practice across LAs |
| 5. Improve accessibility to meet the WCAG AA standard | * All A and AA requirements met * User satisfaction | * Complete an accessibility audit of pages in the user journey to find and complete a course * Carry out development work to meet the recommended requirement to meet the AA level |

# 5 Product requirements

## 5.1 Admin and HR director requirements

The following are requirements for functionality to be developed for the platform as required by admins and HR directors across Welsh LAs.

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| **#** | **Title** | **Description** | **Priority** | **Notes** |
| 1 | Password reset | As HR/Admin I would like to be able to reset a user’s password myself so that I don’t have to contact the Helpdesk each time. | Must | Source of annoyance for many LAs. |
| 2 | Link to HR software via API | As HR/Admin I would like data for when a user completes a course for this to be sent to the HR tool that we use so that this information does not have to be transferred manually. | Should | A key thing that Learning Pool does, making compliance a lot less stressful for HR.   * Note: Denbighshire has a process in place that LAs can duplicate in the short term. |
| 3 | Navigation options | As HR/Admin I would like users to only see dropdown options for their own LA or the All Wales courses from the main navigation, so that they don’t accidentally take a course via the wrong LA and it not showing up in our reports. | Must | This issue causes a lot of stress to both L&D staff and the end user when it occurs. |
| 4 | Course access restriction | As HR/Admin I would like users to only see courses from their own LA or the All Wales courses when they search / use the dropdown to select a course, so that they don’t accidentally take a course via the wrong LA and it not showing up in our reports. | Must |  |
| 5 | Search by user | As HR/Admin I would like to be able to search for a staff member to see what courses they have taken on the platform, so that I can get a full view of the person and how to support their learning and development needs. | Must | This is available on LP. Currently in L@W HR/Admin must go into each course and find the individual there. No full view of each user. |
| 6 | Remove user self-enrolment | As HR/Admin I would like the self-enrolment functionality for end-users to be removed so that I can ensure that all staff from my LA are enrolled with a username using the format {payroll number} {LA name} e.g. 12345newport, so that it is easier to track our staff when it comes to reporting. | Should | Users signing up themselves rarely use the specified format, which makes it difficult to track them. |
| 7 | Hierarchy path | As HR/Admin I would like to have the hierarchy path in the reports so that I can better identify an individual by their manager/department as there are so many people with similar names it isn’t enough information to keep track of. | Should |  |
| 8 | Restrict enrolment code | As HR/Admin I would like to restrict an enrolment code that I create to users from my own LA so that staff don’t use codes not meant for them and take a course from the wrong LA. | Should | Will not be needed if we limit users to only being able to see courses from their own LA + All Wales. |
| 9 | Adapt to organisation changes | As HR/Admin I would like the platform to be updateable with new starters, promotions, leavers when this happens in line with my HR system so that it doesn't have to be done manually. | Must | Quite complex to update manually and can be a lot of work when you have thousands of staff. |
| 10 | Auto send account creation email | As HR/Admin I would like to send a personalised email to users with login information, the enrolment code, and some details for the mandatory courses they need to take as currently I have to do this manually for each new user. | Must | The current automatic email is basic. |
| 11 | Update completion date | As HR/Admin I would like the platform to provide an updated completion date when a staff member re-takes a course e.g. GDPR course refresh, so that I can be sure that users are up to date with new training. | Must |  |
| 12 | Local contacts for all Wales courses | As HR/Admin I would like the platform to have information for a LA contact presented to users viewing and taking an All Wales course so that we are who they contact for support should they need it. | Must | Possible ways to resolve:   * Duplicate All Wales courses across all LAs * Update the content with contact info for each LA |
| 13 | Course completion duplicates | As HR/Admin when I receive a completion report, I would like there to be no duplicates, so that I can be sure about the data in the report and trust it. | Must |  |
| 14 | Excel recognisable date | As HR/Admin I would like the date format in the Excel/CSV reports to be recognisable by Excel so that I don’t have to go through and type the dates in manually. | Must | Only way to get dates in the correct format currently is to re-type the data. |
| 15 | Updating courses completion timestamp | As HR/Admin I would like to keep the completion dates for users when I make small updates to a course as currently the system gives a new completion date for all users. | Must | We should try to recreate the error.  Apparently on Lp you can pull through the previous version of the course with the original completion dates for users. |
| 16 | Report on NHS courses | As HR/Admin I would like to be able to have a report on the NHS courses that staff my LA have taken so that I have an insight into what else interests users so that we can support them more. | Should | No ability to do this apparently. |

## 5.2 End user requirements

The end user requirements are for people taking the courses on L@W. Note that this is a large and varied group of people and only a few of the requirements have been captured so far. Additionally, some of the requirements are second hand from speaking to Admins/HR/Heads of DS and would have to be treated as assumptions. Requirements #1 - 9 were captured from user research interviews with end users, whilst requitement #10 - 16 were captured when speaking to Admins/HR/Heads of DS.

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| **#** | **Title** | **Description** | **Priority** | **Notes** |
| 1 | Device compatibility | As a user I would like the platform to work effectively on mobile and tablet, so that I can take courses even if I don’t have a computer. | Must | During lockdown, some LAs staff have not been able to access e-Learning. Platform issues on mobile and tablet reported. |
| 2 | Finding modules | As a user I want to be able to find modules relevant for me easier to find, so that I don’t accidentally take the wrong course or a course with the correct name but run by a different LA. | Must | Many Admins and HR staff have taken to sending out links to the specific course to mitigate this issue. |
| 3 | Saving and returning | As a user I would like the interface to be more intuitive when I want to save where I am on a course and return to it later, so that I can easily carry on where I left off. | Must |  |
| 4 | Highlight mandatory courses | As a user I would like to have all the mandatory courses highlighted to me so that I can prioritise the courses that must be taken. | Should |  |
| 5 | Highlight outstanding courses | As a user I would like any outstanding courses to be displayed clearly on the platform so that I can identify them easily and prioritise these courses. | Should |  |
| 6 | Interaction | As a user I would like to be able to have a conversation, ask questions and be able to interact with the course leader and other participants for certain topics so that I have the best learning experience. | Should | Current courses are ok for entry level e.g. what are the GDPR rules, do’s and don'ts, but not appropriate for all courses. |
| 7 | Improved look and feel | As a user I would like the platform to have a look and layout that is more intuitive and attractive, so that I am able to engage and navigate more easily | Must | This would make the platform more user-friendly, particularly for users who have lower computer literacy. |
| 8 | User guidance | As a user I would like more guidance available to help me through any issues I experience while using the platform | Should |  |
| 9 | Single sign-on | As a user I would like the platform and my LA platform to share a single sign-on to do away with the need to log in multiple times | Should |  |
| 10 | Full screen on course page | As a user I would like the full-screen button on the course page to only show me the content of the training and not any of the platform, so that I can make full use of my screen and view the content properly. | Must | Not having a proper full-screen mode, can lead to call to action buttons not visible and two scroll bars on the RHS which is confusing. |
| 11 | Bi-lingual at start | As a user I would like to select Welsh or English upon logging into the platform, so I don’t have to see the same content twice throughout the platform. | Should | Not a significant issue but would help to create a simpler and clearer interface. |
| 12 | Browser compatibility | As a user I would like the platform to work on the Edge browser as this is the browser most commonly provided on computers and I don’t know how to download a different browser or if I am allowed. | Must | Apparently, the platform works best on Chrome, but staff that are not familiar with computers don’t know how to download a new browser. |
| 13 | Buffering interactive content | As a user I would like the interactive content to load more easily e.g. issues with buffering, exercises resetting halfway through, so that I don’t have to restart part of the course repeatedly. | Must |  |
| 14 | Updated courses | As a user I would like to know if a course has been updated/re-launched and if I need to take it again, so that I can keep up to date with the training I need to take. | Should | This is often done manually but some automation would be helpful. |
| 15 | New training when promoted | As a user I would like to know what my new training requirements are as a result of getting a promotion, so that I can easily keep up to date with what is required of me. | Should | Some cohort functionality exists. Not clear on the automated notification functionality and UX. |
| 16 | Thoroughness of course | As a user I would like to have longer more detailed training online, as some of the current courses feel too short and not thorough enough, so that I am satisfied with how much I have learned. | Must | Some courses are only an hour. Doesn’t feel detailed enough, not satisfying for users. Feels a bit “tick-boxy”. |

## 5.3 Course creator requirements

These requirements are for those creating courses either via L@W or via other formats such as webinars. The only group that was reached out to as part of this study was the Heads of democratic services.

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| **#** | **Title** | **Description** | **Priority** | **Notes** |
| 1 | Upload video content | As a course creator I would like to be able to upload videos to the platform, so that if I video record a training session those attending it can view it again later. | Must | There are some code of conduct training sessions that have had to be uploaded to YouTube. |
| 2 | Interactive sessions | As a course creator I would like to be able to run training for groups e.g. an interactive discussion so that users can be challenged and not just learning about do and don’ts. | Must |  |
| 3 | Mixture of activities | As a course creator I would like to have a mixture of activities e.g. videos, reading, images, discussions, questions, so that I can mix things up and make the course more engaging for users. | Must | Feedback is that staff taking courses engage more when there are several types of activities, otherwise they switch off. |
| 4 | Genuine assessment at end | As a course creator I would like there to be a genuine assessment at the end that users need to pass so that there is more rigour to the course. | Must |  |
| 5 | Certificates of value | As a course creator I would like the certificates to look more professionally designed and say “passed” rather than “completed”, possibly providing a grade, so that the course looks like it holds value. | Should | The certificates are popular but could be made to make people feel a sense of achievement. |
| 6 | Re-visiting content | As a course creator I would like users to be able to re-visit the content, but for this to be more than a slide deck, even if it is interactive as it is not enough to be able to refresh memory for what was learned in the actual training. | Must |  |
| 7 | Updating with new guidance | As a course creator I would like to provide users that have taken a course with any new guidance that has become available since they took the course and for this to be in one place to improve the learning experience. | Should | Usually in the form of useful links with commentary from the course creator. |
| 8 | Evaluation form | As a course creator, I would like there to be an evaluation form for users to complete at the end of the course, so that I can have the feedback to improve the course for staff taking it in the future | Must |  |

## 5.4 Training requirements

The following requirements are for training. These are things that users would like to be able to do, but the platform is unintuitive for users to work out for themselves and hard to remember even when users are shown a demo.

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| **#** | **Title** | **Description** | **Priority** | **Notes** |
| 1 | Creating custom reports | As HR/Admin I would like to have an online tutorial / training course to learn how to create my own custom reports so that I can be self-sufficient when using the platform and because I find the platform unintuitive. | Must | HR/Admins either didn’t know they could create a custom report or couldn’t work out how to do this by themselves. |
| 2 | Course  Creation functionality | As HR/Admin I would like to fully understand what features are available to me when creating a course, so that I can support designing of courses to make them more engaging for users. | Must |  |
| 3 | Course creation best practice | As HR/Admin I would like to learn from others how they have utilised the platform to create courses, what has worked / not worked so that I can learn from the experience of others at a different LA. | Should |  |
| 4 | Assigning courses to cohorts | As HR/Admin I would like to know how to create cohorts in the platform and then assign different cohorts with a separate set of training courses, so that I have the materials to refer to at my own convenience. | Must |  |

# 6 Recommended next steps

The following are recommended next steps for making improvements to the L@W platform in terms of functionality and usability issues. Additionally, more work needs to be done to help design a better, more intuitive, and interactive learning experience for users.

## 6.1 Learning from others

Some of the issues identified in this study relate to the fact that local authorities have taken a disparate approach to their course provision, and whilst many mandatory courses are very similar in content, this can lead to difficulties for users. This disparate approach can also result in very similar issues needing to be addressed 22 times.

If local authority course content could be consolidated, with an agreed set of training standards, we are confident it could mitigate some of the problems identified in this research.

When looking for examples of consolidated learning we looked to NHS and Welsh Government. They have both taken a consolidated approach to their course provision, and anecdotal feedback suggests that they experience fewer of these issues as a result.

This is one example where lessons could be learned from others, but other types of best practice could be identified if a study of training provision within other public sector bodies was carried out.

## 6.2 More end user research

The discovery phase of this study was unsuccessful in getting the desired engagement from end users of the L@W platform and some of the end user requirements were obtained second hand from speaking to Admins/HR/Heads of DS and would have to be treated as assumptions.

If the study progresses to the Alpha phase, then a concerted drive to encourage end user participation would be recommended.

## 6.3 Further usability testing

The following issues were raised when speaking to different users during the interviews. The errors need to be re-created and usability tested to see what is happening before deciding on how to proceed.

* Test platform on different browsers e.g. what issues are there, particularly with Microsoft Edge
* Test platform on iPad and other tablet devices - see how the platform works on smaller form factors
* Test course completion user journey for:
  + Whether users complete the course and can get a certificate
  + Whether the course completion results in the reports showing course ‘completed’ or not, what the issue might be
* Test certificate design e.g. can a logo be updated
* Test if the completion date gets updated if you retake a course / refresher

## 6.4 Detailed competitor analysis

To understand why some LAs are choosing to move to alternative, and often costly, e-learning platforms, a detailed competitor analysis should be carried out to compare the L@W offering against a selection of other e-learning platforms.

Ceredigion has shared a competitor analysis they recently undertook between L@W and 5 other e-learning platforms to compare which platforms can deliver the functionality they require. Their analysis shows that, for much of their required functionality, L@W does not offer the functions that many other e-learning platforms do provide.

Having mapped the requirements identified above against the functionality requirements from the Ceredigion competitor analysis, around 80% of these requirements also feature in the competitor analysis.

This analysis is available in [Annex A.](#_Annex_A)

## 6.5 Find out more about what users DO like

We’ve heard a lot about usability issues and missing functionality, but not much about what users do like, for instance on platforms other than Learning Pool.

A suggestion is to take courses on different platforms, to see what we like about the functionality and user experience. We could also get some of the course creators to do this activity. For instance, do we want the content to be limited to SCORM packages? Some platforms worth trying are:

* [FutureLearn](https://www.futurelearn.com/) - A private company jointly owned by The Open University and The SEEK Group. They do [work with businesses](https://www.futurelearn.com/business) to provide analytics and reporting as well.
* [Udemy](https://www.udemy.com/) - An online platform for e-Learning. See how course [content is broken down](https://www.udemy.com/course/become-a-superlearner-2-speed-reading-memory-accelerated-learning/) into bite size chunks. A real focus on what users will learn.

# Annex A

## Ceredigion e-learning platform competitor analysis

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Function** | **NHS Learning Platform (L@W)** | **Learning Pool** | **Titus (Moodle)** | **Absorb** | **Skills Network** | **Docebo** |
| Bilingual  Functionality either  through a bilingual  plug-in or adaptive  design which can be  tailored to show  either Welsh or  English text | On local course content level only | Yes, via plugin | Yes, via plugin | Yes, via plugin | Unsure | Y |
| SCORM Compliant | Y | Y | Y | Y | Y | Y |
| Automated  integration between  current HR system  (iTrent) and LMS for  user account creation | N | Yes, via API | Yes, via API | Yes, via API | Unsure | Yes, via API |
| Where an automated  process of account  creation cannot be  achieved, a process  of a bulk upload of  current staff via a  cohort on a weekly  basis is required | Y | Y | Y | Y | Y | Y |
| Automated  integration between  current HR system  (iTrent) and  completion of  modules, where the  data is migrated on a  daily/weekly/monthly basis | N | Yes, via API | Yes, via API | Yes, via API | Unsure | Yes, via API |
| Ability to create  accounts for external  partner staff | Y | Y | Y | Y | Y | Y |
| Ability to group staff  together according to  service area and  assign groups to  relevant courses and  materials | Y | Y | Y | Y | Y | Y |
| Single Sign-on | N | Y | Y | Y | Y | Y |
| Gamification and  awards | N | Y | Y | Y | Y | Y |
| Individual User  Dashboard | N | Y | Y | Y | Y | Y |
| Individual email  alerts when a staff  member is enrolled  into a course | N | Y | Y | Y | Y | Y |
| Email alerts to  individuals when a  mandatory course is  not completed within  a set timeframe | N | Y | Y | Y | Y | Y |
| Reporting – Team  managers to be able  to create and  interrogate their own  reports | N | Y | Y | Y | Y | Y |
| Ad-hoc report  creation | N | Y | Y | Y | Y | Y |
| Ability to include  documentation,  audio, video,  webinars and  podcasts onto a  learning pathway | Via URLs only | Y | Y | Y | Y | Y |
| Administrative  functions where an  individual can be  supported or  troubleshoot any  query | N | Y | Y | Y | Y | Y |
| Chatbot between  users and local admin | N | Y | Y | Y | Y | Y |
| Provide certificates  for learners | Y | Y | Y | Y | Y | Y |
| Social interaction  between learners via  feedback and forums | N | Y | Y | Y | Y | Y |
| Send automatic  reminders to users  when mandatory  modules need to be  renewed | N | Y | Y | Y | Y | Y |