



ORGANIZE YOUR TRAININGS IN ADOBE CAPTIVATE PRIME

Use Metadata to segregate, sort and filter Trainings.



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WHY & HOW TO ORGANIZE YOUR TRAININGS?

When you have a large and diverse employee population across all kinds of departments and verticals, it is more than likely that you have several hundred training programs, including many that overlap. It can become confusing for Admins in the LMS to sort through and assign appropriate Trainings to appropriate groups of learners. It can be just as difficult for learners to find and narrow down training content that would suit them.

This document will help you work through how to organize your training content according to the audience.

For further assistance and guidance, do reach out to your CSAM.

Training(s)

The word "Training" or "Trainings" is used as a mass countable noun, wherein Training refers to a training program. In Adobe Captivate Prime, a Training could refer to a Course, a Learning Program, a Certification, or a Job Aid.

USE METADATA TO ORGANIZE TRAININGS

Metadata are data that give information about other data. Adobe Captivate Prime uses different kinds of metadata to sort and segregate Trainings available in the LMS. Metadata help an Admin assign Training correctly and assist learners in their search for Trainings. This document is a deep dive into Prime's metadata and how to best use them to manage your Trainings in the LMS.

TYPES OF METADATA AND THEIR AUDIENCE

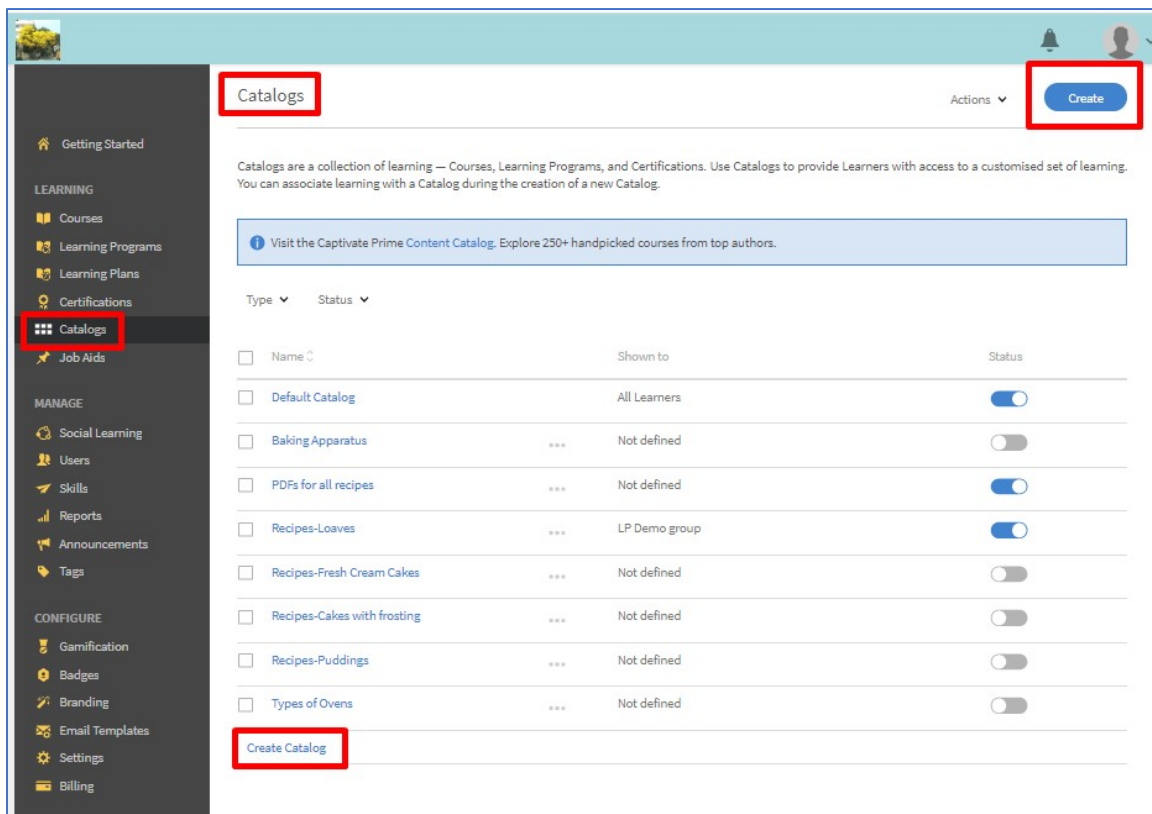
Metadata	Audience: Admin Internal	Audience: Learners
Catalog	Yes – Primary Audience	Yes – Secondary Audience
Skills	Yes – Secondary Audience	Yes – Primary Audience
Tags	Yes – Secondary Audience	Yes – Primary Audience
Catalog Labels	Yes – Primary Audience	Not Available to Learners
Course name/Description	Yes – Secondary Audience	Yes – Primary Audience

CATALOGS

Catalogs are collections of Trainings that include Courses, Learning Programs, Certifications and Job Aids. They are primarily intended for Admins/Authors to use to organize Trainings. When “[enabled](#)”, learners can use them as a filter in their search for Trainings.

Catalogs have two purposes:

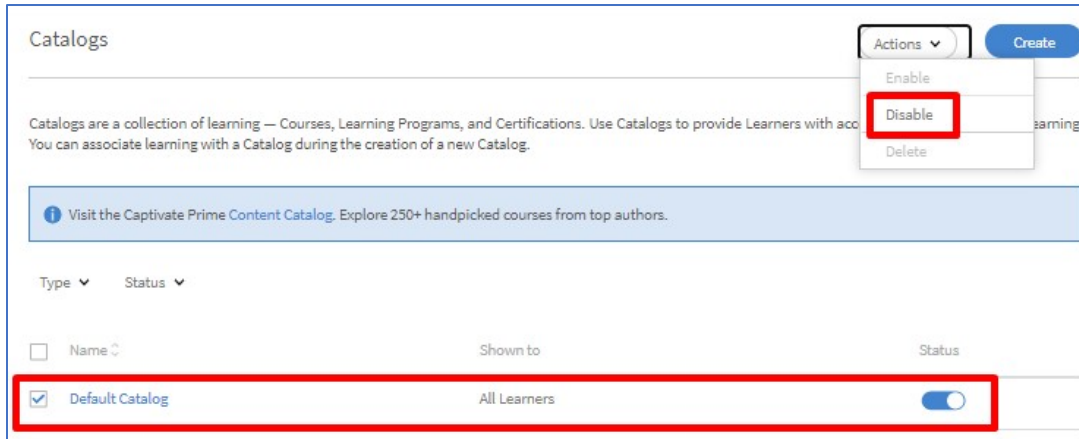
1. To Create silos of Trainings according to User Groups; and
2. To Create silos of Trainings according to Kind of Trainings available. The example below shows Catalogs as silos of Trainings according to kind or type.



The screenshot displays the Adobe Captivate interface for managing Catalogs. The left sidebar contains a navigation menu with 'Catalogs' highlighted. The main content area features a 'Catalogs' header with a 'Create' button. Below the header, there is a descriptive text and a notification banner. A table lists various catalogs with their status (enabled/disabled) and the group they are shown to. The 'Default Catalog' is enabled and shown to 'All Learners'. Other catalogs are disabled and shown to 'Not defined' or 'LP Demo group'. A 'Create Catalog' button is located at the bottom of the table.

Name	Shown to	Status
Default Catalog	All Learners	Enabled
Baking Apparatus	Not defined	Disabled
PDFs for all recipes	Not defined	Enabled
Recipes-Loaves	LP Demo group	Enabled
Recipes-Fresh Cream Cakes	Not defined	Disabled
Recipes-Cakes with frosting	Not defined	Disabled
Recipes-Puddings	Not defined	Disabled
Types of Ovens	Not defined	Disabled

[Catalogs can be “disabled” for learners](#) if you want to only use Catalogs for Admin/Author purposes of segregation. In the screenshot above, the blue buttons indicate “enabled” Catalogs, i.e. discoverable by learners.



Disable a Catalog when you do not want it to be available to learners.

TIPS AND BEST PRACTICE RECOMMENDATIONS:

- Name Catalogs to identify user groups and training.
- Create a catalog naming policy across all Trainings. Eg. Audience+Mode+Location. Example names:
 - All Learners-eLearning
 - All Learners-LinkedInLearning
 - Partner A-Classrooms-Paris
 - Partner A-Classrooms-London
- Admins must put the right content in the right catalog.
- Learners can filter Trainings to get what they need specifically e.g. "classroom training in Paris".

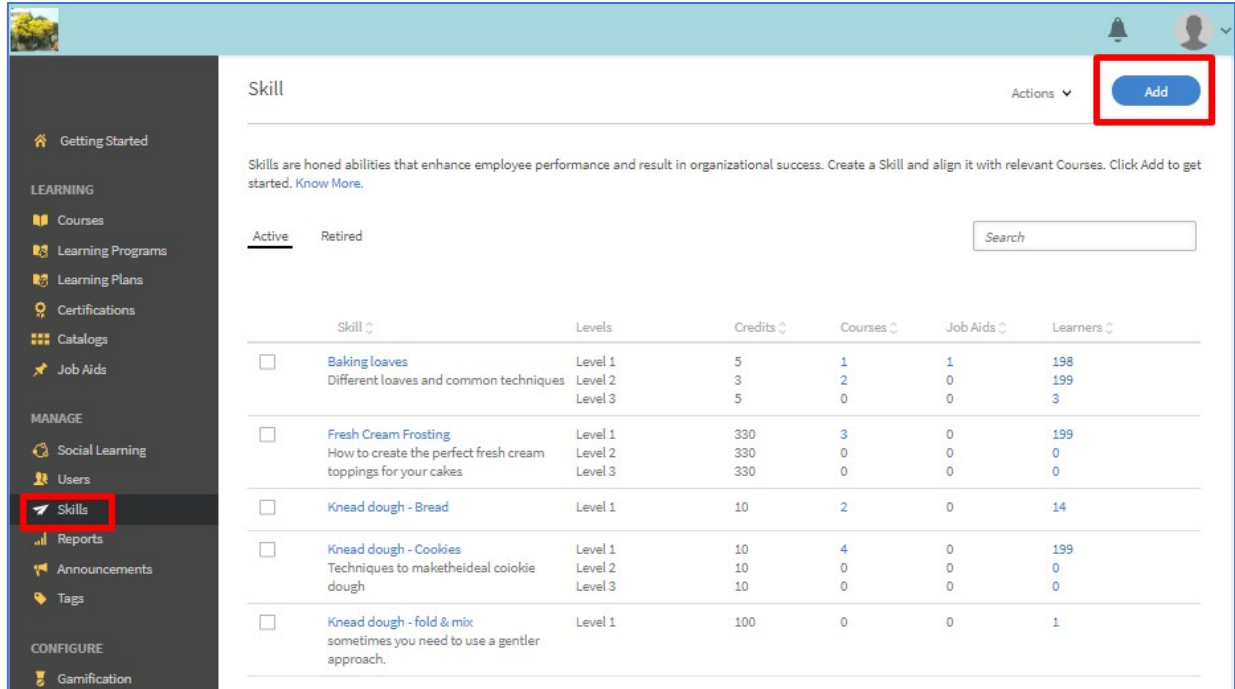
[Find out more about how to create and work on Catalogs here.](#)

SKILLS

Every Course that is created in the LMS is aligned or associated with a Skill or Skills. When learners in the LMS want to build Skills, they can search for Trainings using Skills as a filter and then take the Trainings that are associated with it. [Find out about aligning Skills with your business goals here.](#)

Use Skills to:

1. Let learners look for Trainings that impart a specific skill.
2. As subject matter categorization



Skill Actions ▾ Add

Skills are honed abilities that enhance employee performance and result in organizational success. Create a Skill and align it with relevant Courses. Click Add to get started. [Know More.](#)

Active Retired Search

Skill	Levels	Credits	Courses	Job Aids	Learners
<input type="checkbox"/> Baking loaves Different loaves and common techniques	Level 1 Level 2 Level 3	5 3 5	1 2 0	1 0 0	198 199 3
<input type="checkbox"/> Fresh Cream Frosting How to create the perfect fresh cream toppings for your cakes	Level 1 Level 2 Level 3	330 330 330	3 0 0	0 0 0	199 0 0
<input type="checkbox"/> Knead dough - Bread	Level 1	10	2	0	14
<input type="checkbox"/> Knead dough - Cookies Techniques to maketheideal cooikie dough	Level 1 Level 2 Level 3	10 10 10	4 0 0	0 0 0	199 0 0
<input type="checkbox"/> Knead dough - fold & mix sometimes you need to use a gentler approach.	Level 1	100	0	0	1

TIPS AND BEST PRACTICE RECOMMENDATIONS:

- Identify all Skills you want your learners to have;
- [Create these Skills in the LMS](#)
- List of Skills should be like a list of Areas/Topics of training made available on the platform.
- If some Skills have varying subject matter you could consider listing them like:
 - Sales-Negotiations
 - Sales-Pricing
 - Compliance-Harassment
 - Compliance-Anti Bribery
- For each Skill, each Level is achieved on gaining 100 credits.
- Learners can take 1 or more Assessment(s) or 10 Trainings without assessment to achieve a specific Skill Level.
- A Training would then be set up to have a maximum of 10 credits if there is no assessment in that Training.
- Trainings Courses with an Assessment can have any number of credits above 10.
- Third party training can also be retrofitted with Skills. Your CSAM can guide you through this.

TAGS

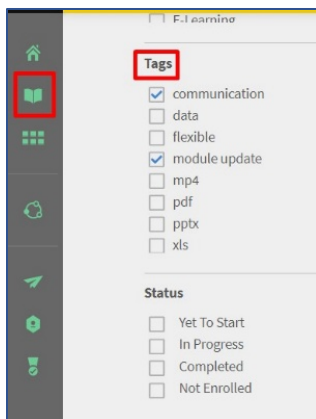
Tags are an easy way for learners to search for Trainings. A glance at a list of tags will tell a learner if that is the Training s/he wants to undertake. [Learn how to create Tags here.](#)

Use Tags to:

1. Complement Skills; or
2. Use independently of Skills.

E.g. For example, if a Course is associated with two distinct Skills you can tag it with a hyphenated name, such as “Engineering-Security” which then gives a learner a good idea of whom it is intended for. If you have not configured Skills for your LMS, then Tags will help learners identify the subject matter of the Trainings and even the type.

In the Learner UI, learners use Tags as filters to search for Trainings:



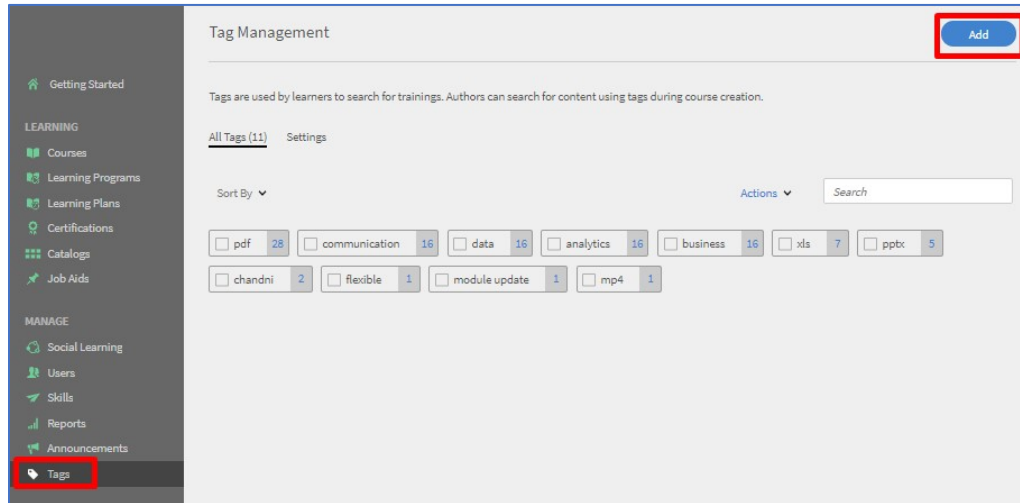
TIPS AND BEST PRACTICE RECOMMENDATIONS:

- Define a policy for Admins/Authors who create content, e.g. “Use tags in a hyphenated manner: Language-Duration-Compliance/Source”.

Tag Examples:

- English-60minutes-Languagecompliance
- French-30minutes-Checklist
- French-15minutes-CEO's Office

- Have a select set of team members create Tags, and a larger set of Authors apply the Tags. Prime allows control over who can create and who can apply Tags. Tag management can also be used to clean up/merge/delete tags in case there are superfluous tags in the system.



CATALOG LABELS

Think of catalog labels like you would tags except that they are not learner-facing but for Admins and Authors to further categorize and potentially analyze content distribution.

You may ask: why not create more Catalogs instead of using Labels? Two reasons:

1. You might end up with a list of Catalogs so long that it becomes unwieldy; and
2. You would have to manage learner visibility for every one of those catalogs – also tricky.

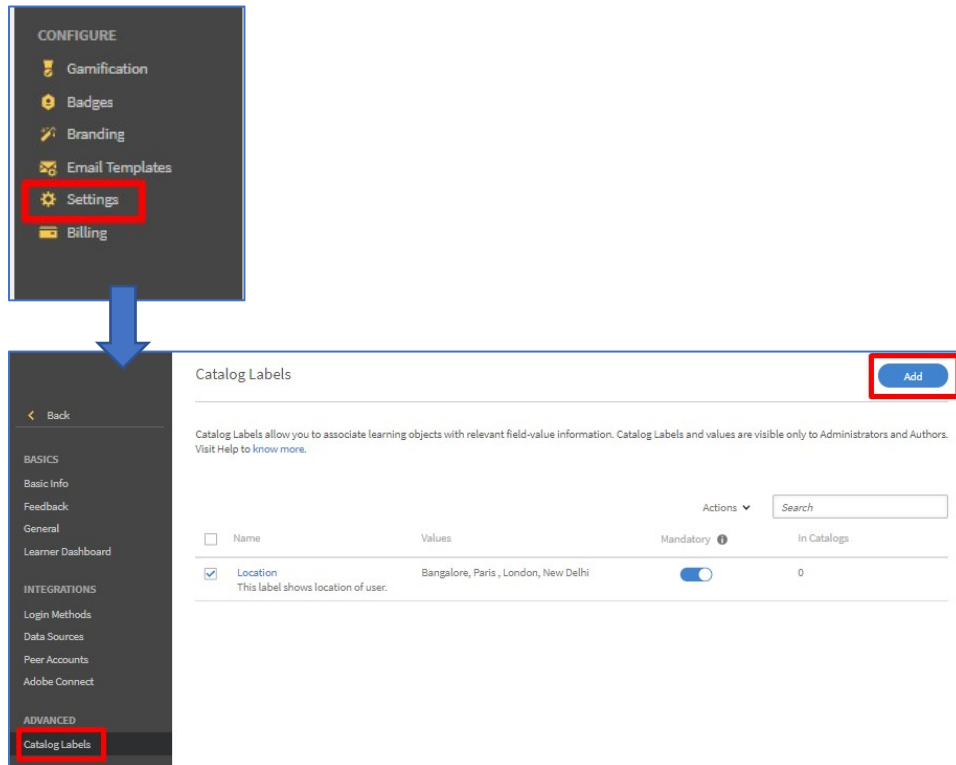
Apply Catalog Labels to all Catalogs to further organize Trainings according to values you can define when you create the Labels. [Learn about creating Catalog Labels here.](#) For example, you can label catalogs according to location, the time period they are to be used within, whose team it is for, etc.

Say you have a Catalog on Gifting Policies, and this Catalog has several Trainings in it and is applicable to many departments. It would be easier to apply the department labels to the one Catalog than to create multiple catalogs to manage them.

You could create a Catalog Label called Departments and populate the Values field with names of departments, e.g. Sales, HR, Marketing etc.

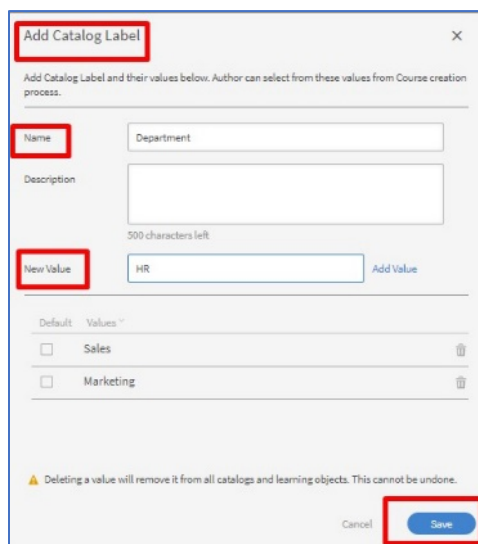
Follow the process below:

1. As Admin go to Settings and select **Catalog Labels**. Select **Add**.

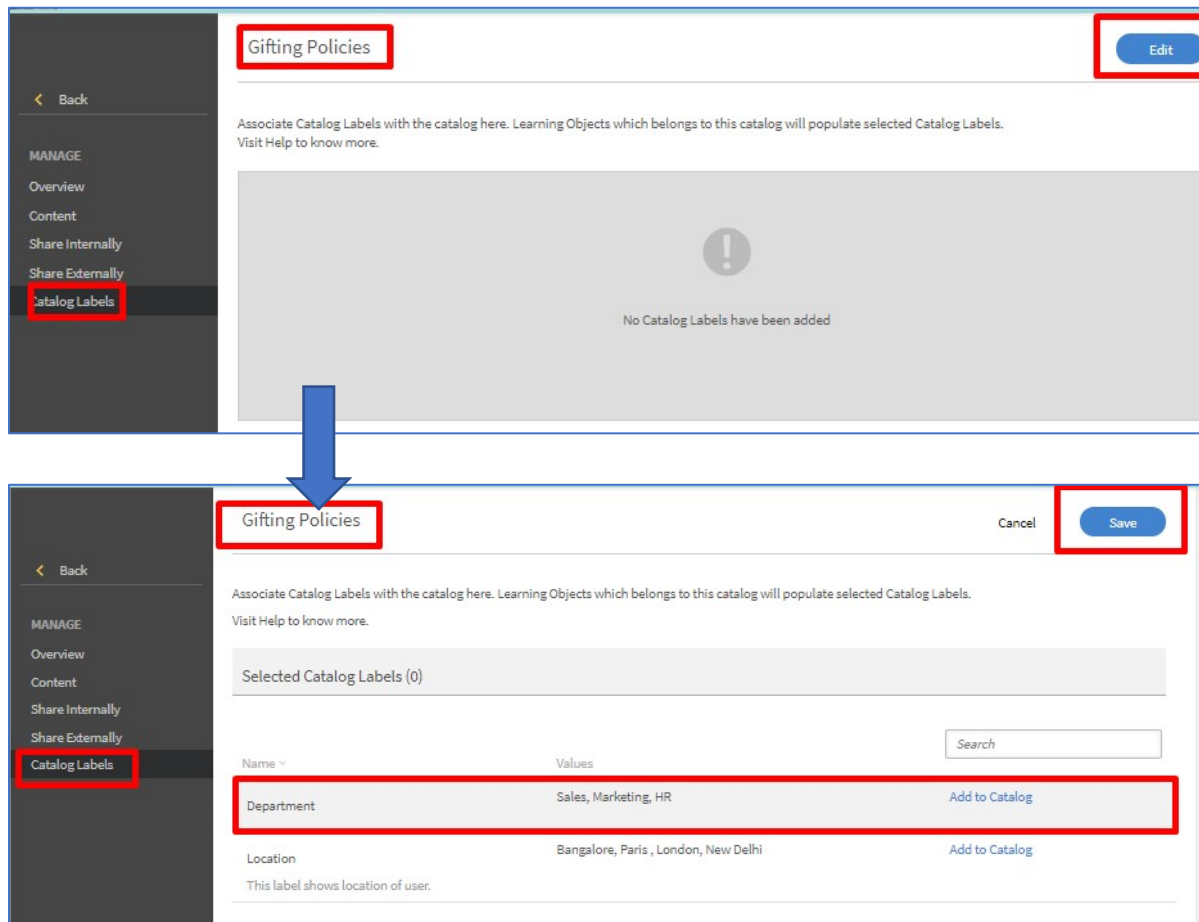


Note: You can make some labels mandatory e.g. when you want your content labeled according to Location.

2. Create your Label with its Values, e.g. Department and Values = Sales, Marketing, HR.



3. Go the Catalog to apply the Label you want:



4. Once you have added a Label to your Catalog, you must add Courses to the Catalog. Then, as Author, add applicable Catalog Labels to Courses in that Catalog. Go to Course Overview and you will find Catalog options now available. Note: When you make Labels mandatory e.g. when you want your content labeled according to Location, it will appear as below.

Overview

Settings

Email Templates

Instances

CONFIGURE

Instance Defaults

PREVIEW

Preview as learner

Prework: Helps learners prepare for the Course.

Add Modules

Testout: Allows learners to skip Course content. [Know More.](#)

Add Modules

Sequencing of Modules

Decide if learners must take Modules in sequential order.

Ordered Unordered

Mandatory Modules

All of 1 Module(s)

Minimum number of completed Modules required to successfully finish the Course.

Cover Image

Add an image to represent this Course. This will appear as a Course tile.

Banner Image

Add a banner image to represent this Course. It will appear on the Course page.

Select Catalogs

Location *

Department

Default Catalog Gifting Policies

This field is required.

Select Catalogs

Default Catalog Gifting Policies

Location *

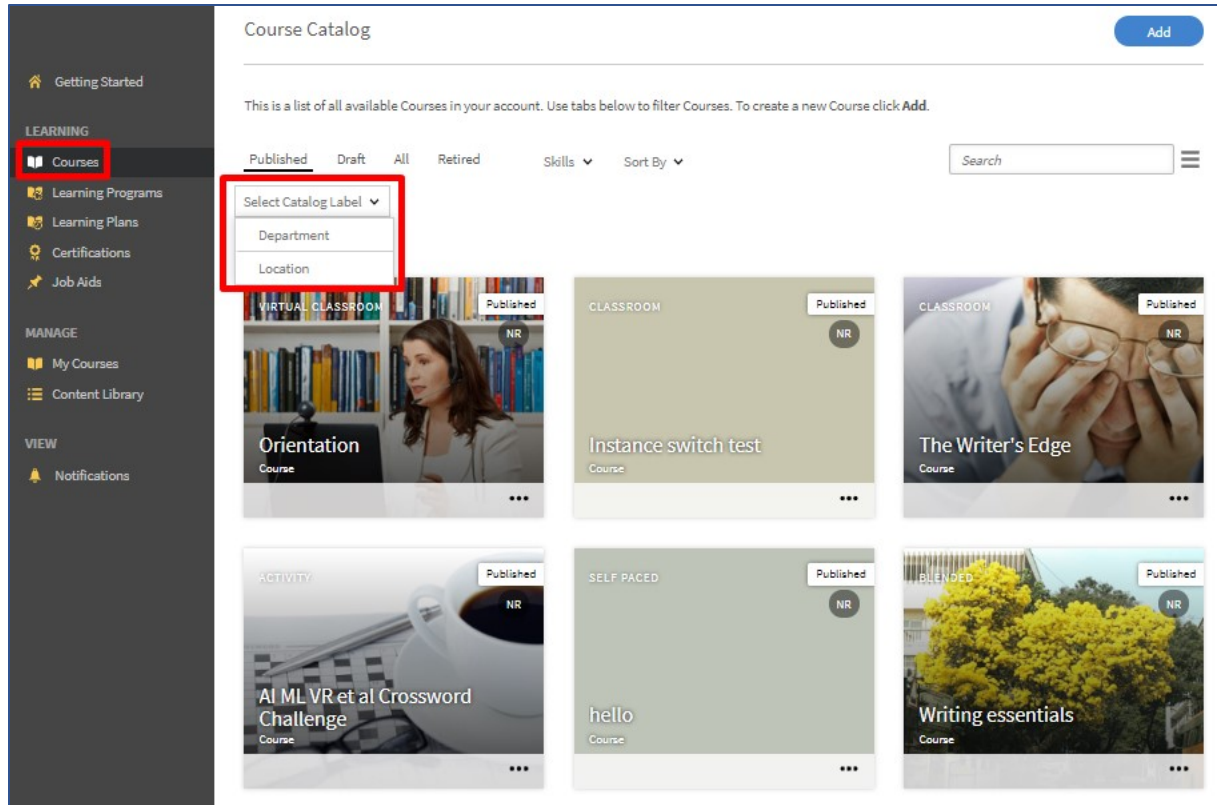
Bangalore

Department

Sales HR Marketing

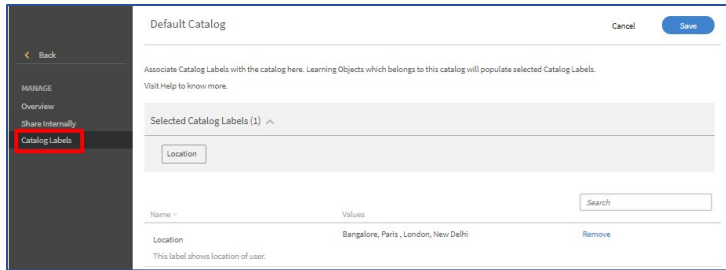
Unique Learning Object Id

5. Finally, once you label the Courses in your Catalog, when you next go to the Catalog page, a dropdown menu appears allowing you to **Select Catalog Label**. You can now use Labels to filter Courses.



TIPS AND BEST PRACTICE RECOMMENDATIONS:

- Create a Catalog Label policy, e.g. Catalog Labels must identify Trainings based on:
 - Which team owns the Training.
 - When it is due for an update.
- Examples:
- Jim's Team
 - Q32020
 - Q12020
 - Q22020
 - Q32020
- Apply the label at the Default Catalog Level so that it applies to all the Trainings.



- Authors can choose from these values and apply to any Training.
- Authors/Admins can use Catalog Labels as filters when managing content e.g. if they use the filter Label Q42020 they can quickly learn which Training is due for an update.

TRAINING NAME AND DESCRIPTION

Trainings have names and descriptions that work as metadata for learners. Every time you create a [Course](#), [Learning Program](#), [Certification](#) or [Job Aid](#), you are required to provide descriptions. Use this opportunity to include a set of keywords that learners can search for to find the respective Training.

TIPS AND BEST PRACTICE RECOMMENDATIONS:

- Authors should use an appropriate naming convention for the Title and Description of each Course/Learning Program/Certification/Job Aid.
- Include keywords in a line at the end of the Course description: "Keywords: Password Management, Phishing..." etc. for a Course on *Security Policy Training*.
 - The Author can decide what keywords to use.
 - Keywords should be words you would expect a learner to use in their search.
 - Restrict the number of keywords so that Authors pick the top five.

CONCLUSION

When you have several teams whose needs overlap but for whom Trainings need to be organized (location/managers/language, etc.), it is important to manage your collection of Trainings so that learners can find/be assigned appropriate Trainings. Similarly, when you have several Trainings available, it is a good idea to be able to sort them according to subject matter or audience for example, or both, so that once again the correct Training is made available to the right audience. Grouping and sorting using Catalogs ensures a well-



organized training collection, and with Labels you can enhance your efficiency as Author/Admin, while adding Skills, Tags, and keywords are extremely beneficial to your learners.

Adobe Captivate Prime provides a comprehensive system of metadata to organize and manage your training programs. Please do contact your CSAM for further help with organizing your data. For help, please contact captivateprimesupport@adobe.com.

We hope you found this document helpful. For feedback on the same, please do write to jaisim@adobe.com.