

SumTotal Integration Guide



Overview	2
Setup	2
Prerequisites	2
Configuration Steps	3
Phase 1 Integration Details - Complete NovoEd Todo for completion of linked SumTotal Activity	6
Set up a SumTotal Activity as a Third Party Tool in NovoEd	6
Learner Experience	6
Checking Completion from SumTotal	6
Phase 2 Integration Details - NovoEd syncing of Enrollments and Completions with SumTotal	7
Overview	7
Process Overview	7
Create a NovoEd Course	8
Manually Create a SumTotal Activity for a NovoEd course	8
Link SumTotal Activity to a NovoEd course	8
Managing the SumTotal Activity	10
Registration Workflow	10
Sending Completions to Sumtotal	10



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Overview

This document is intended for a NovoEd Org Admin who is also a SumTotal System Admin and serves as a guide for the setup and configuration of NovoEd's SumTotal integration.

Setup

Prerequisites

Please ensure that the following prerequisites are met prior to configuring the integration.

1. An administrator with the Org Admin role in NovoEd
2. The integration must first be enabled by your NovoEd customer success manager for the NovoEd instance.
3. Single Sign On (SSO) must be configured for your NovoEd instance.
 - Consult our help desk (hello@novloed.com) for enabling SSO for your institution if it is not enabled.
 - The NovoEd technical solutions team can enable testing SumTotal integration without SSO; however, using the integration at scale requires SSO.
4. The integration requires API access and the setup of a SumTotal OAuth Client. Make sure you have administrator access or have had this step completed ahead of time.
5. In NovoEd, configure your organization level profile settings and ensure that a field for the SumTotal Username is created, integrated with SSO (or alternate method), and data loaded for any existing learners prior to enabling integration..
 - SSO is the preferred method to get SumTotal username, so it is always available when a user logs in, although API or HCM integrations can be considered as well
 - If passing SumTotal user name is set up after learners are being registered and completing courses, it is required that a one time load of SumTotal usernames is done into org profiles. This will make sure existing enrollments and completions pass correctly when courses are linked.



Configuration Steps

After prerequisites are met, you may configure and authenticate the SumTotal integration as follows.

1. Create a SumTotal OAuth Client to be used to make the API call for the integration. To do this you must login as an administrator and complete the following steps.
 - Navigate to Administration / System / Configuration / Technical Configuration / OAuth Configuration
 - Click + Add
 - Create a Client with the Following
 - Client Name: NovoEd Integration
 - Client Id: Copy the key down to share with NovoEd
 - Client Secret: Copy the secret down to share with NovoEd
 - Allowed Grant Types: Client Credentials
 - Settings: Enabled Checked
 - Service Account User: Leave Blank
 - Access Token Lifetime (minutes): 120
 - Scopes: allapis checked
 - Click Submit



EDIT

Client Name

NovoEd Integration

Client Id

.....

REGENERATE

COPY

Client Secret

.....

REGENERATE

COPY

Allowed Grant Types

- Authorization Code
- Client Credentials
- Resource Owner Password (legacy)

Settings

- Enabled

Service Account User

ALL RESULTS

Search Users

CLEAR

ADVANCED SEARCH

Access Token Lifetime (minutes)

120

Scopes

- allapis
- odataapis
- xapi:root
- xapi:readall
- xapi:writeall
- xapi:all
- xapi:read
- xapi:write

CANCEL

SUBMIT

2. Log in to NovoEd using your Org Admin credentials and navigate to the "Configure LMS Integration" section of "Advanced Settings."
 - o After logging in, click the gear icon  in the left-hand navigation.
 - o Scroll down to the "Configure LMS Integration" section.
 - o Click "Configure" to open the "Configure LMS Integration" modal.

Configure LMS Integration

You can enable a programatic integration with your LMS to sync your NovoEd courses and learner completions into the LMS automatically.

[Configure](#)

3. Select your LMS provider.
 - o Choose "SumTotal" from the "Select LMS Provider" dropdown.



- **Note:** If this option is unavailable, the integration has not yet been enabled. Please contact your NovoEd Customer Success Manager for assistance.

Configure LMS Integration

To configure integration with S... te an OAuth Client and share the
API Endpoint, Client ID, and Sec

API Endpoint

Client ID

Client Secret

Authorize

4. Enter your SumTotal authentication details.
 - SumTotal API Endpoint
 - Might look something like <https://{companyname}.sumtotal.host> or <https://{companyname}.stage.sumtotal.host>
 - SumTotal Client ID and Client Secret
 - SumTotal username and password (as configured in step 1)
 - Click “Authorize” to initiate authorization.



5. Choose your integration settings:

SumTotal Integration Settings ×

Please select the field that will have users' SumTotal Username. The SumTotal username must be synced into each learner's profile in order to sync enrollments and completions.

Please select... ▼

Save

- Choose the NovoEd organization profile field which identifies each user's SumTotal username

Once configured, the "Configure LMS Integration" section within "Advanced Settings" will be populated with details on the integration configuration. An option to disable the integration will be visible and existing courses that meet the synchronization criteria will begin to sync in the background.

Configure LMS Integration

You have configured integration with SumTotal LMS. This integration allows NovoEd to get completion information for SumTotal activities linked as Web Link third-party tool activities in a lesson.

[Disable SumTotal Integration](#)

Part 1 Integration Details - Complete NovoEd Todo for completion of linked SumTotal Activity

Released 12/15/21



The first part of the SumTotal integration allows NovoEd to get completion of third party tool web link activities from SumTotal when linked to a SumTotal activity. This allows the activity “Todo” in NovoEd to be completed based on completion of the activity in SumTotal vs having self-attestation for learners with a “mark as done” button.

Set up a SumTotal Activity as a Third Party Tool in NovoEd

Once the SumTotal Integration is authenticated, it is possible to include a SumTotal Activity as a third party tool activity/to do in NovoEd and have NovoEd completion of the to do/awarding of points be based on completion in SumTotal.

Please make sure that SumTotal username profile field is defined and populated for all existing users and new ones (e.g. via SSO). CSV upload may be used to make sure existing learners get SumTotal username populated without relying on waiting for SSO login.

To add a SumTotal Activity as a NovoEd activity in a course:

1. Add a Web Link third party tool in a NovoEd lesson. Enter the Launch URL for the SumTotal Activity in NovoEd.
 - a. Go into the course in question > choose a lesson page > go into edit mode > choose [+ADD] > choose WEBLINK from the left hand menu.
 - b. The Third party activity must be configured to have points and/or be set as a To do within the course.
 - c. This will allow changing the header/name for the activity as well as the header activity type.
2. When the Integration is configured and the web link activity a to do/has points, NovoEd will recognize a SumTotal launch URL. The UI will be updated to include specific help text and a “Check my Progress” button will replace the normal “I’m done” button.

Learner Experience

For a third party tool integrated into SumTotal, the “I’m done” button will be replaced with a “Check my Progress” button. The “Check My Progress” button will be disabled for the learner until they click on the link at least once. NovoEd will record the first click of the link and will change the progress of the NovoEd activity to In Progress in addition to enabling the button.

Please note: The learner may click the “Check My Progress” button any time to check their progress on SumTotal. This will make an API call to SumTotal and complete the activity/to do in NovoEd if Sumtotal returns it as completed.



Checking Completion from SumTotal

In addition to checking the progress for a learner who clicks the “check my progress” button, NovoEd will check progress from SumTotal to update as follows

- Nightly job that checks activity completion for learners who clicked the link but did not get completion recorded yet.
- If the user clicks the next or previous button to navigate to a new lesson after clicking the link.

Part 2 Integration Details - NovoEd syncing of Enrollments and Completions with SumTotal

Released 2/18/22

Overview

This SumTotal integration has the following goals and benefits

- Allows SumTotal to be the point of discovery and entry into a NovoEd course by having a SumTotal Activity that links to a NovoEd course and syncs enrollment and completions
- Syncs enrollments made in NovoEd, by admin, API, or self enrollment by learner, back to SumTotal Activity Roster, so SumTotal Activity roster is always updated even if learners enrolled directly in NovoEd
- Allows SumTotal Activity Roster to be source of truth for controlling access to courses in NovoEd with closed registration type, for letting a user in NovoEd self-enroll in a NovoEd program with a closed registration type
- Allows SumTotal to be the system of record for all completions, by sending Completions of the NovoEd course to SumTotal

Due to current limitations in SumTotal API, this integration does not automatically sync released, production NovoEd courses to the SumTotal catalog of Learning Activities or push metadata updates. Instead, a manual process is needed to create and update a Sumtotal activity and it must be manually linked to a NovoEd course to sync enrollments and completion.

Process Overview

SumTotal does not currently offer an API to create or update an activity in SumTotal, so it is not currently possible for NovoEd to automatically create a SumTotal Activity for released production courses, or to update metadata on a SumTotal Activity as it changes in NovoEd.

This means the SumTotal Activity corresponding to a NovoEd course must be manually created, linked to NovoEd, and updated as needed.



The general process is as follows:

1. Create NovoEd Course and make note of (copy) the launch URL.
2. Create SumTotal Activity adding the NovoEd launch URL to it and copy or write down activity code.
3. Link NovoEd Course to SumTotal Activity in NovoEd by updating the NovoEd course with the SumTotal activity code.

If successful, the NovoEd course will be linked to the SumTotal Activity to manage registration flow and sending of completions to SumTotal.

The SumTotal activity may need to be updated manually to update metadata as well as modify its visibility, either to restrict access to particular groups or to remove access if the course is ended or closed.

Please make sure that Sumtotal username is populated for existing users prior to linking NovoEd courses to SumTotal activities.

Create a NovoEd Course

First step is to create and build your course in NovoEd.

- The course must be a production course (not demo/sandbox) for the integration to sync.
- The course should also be released in order for learners to start accessing the course.

Navigate to the course home to integrate and copy the Course Flyer or Course Home URL. This will be the launch URL used when creating the SumTotal activity.

- A sample launch URL might look like this:
<https://learn.novoed.com/lxd-ideas-to-impact-winter-2022/> or
<https://learn.novoed.com/#!/courses/lxd-ideas-to-impact-winter-2022/>

Manually Create a SumTotal Activity for a NovoEd course

Admin must **manually** create a SumTotal activity for courses in NovoEd and link to the NovoEd Course to the SumTotal activities to enable enrollment and completion workflows.

1. Click New Activity - and select a type in the upper right corner
2. Fill In the required fields
 - a. General Properties Required Fields
 - Name:
 - Primary Domain
 - Activity Type
 - NovoEd does not validate the Activity type as SumTotal allows custom activity types



- Properties of Activity type must allow it to be “launchable”.
Recommend it supports both general and web based training properties.
 - Some activity types may not work with the entire integration even though it will link successfully, examples include Curriculum, Objective, Class/ITL Class, and ILT Course. For example, some of these do not allow NovoEd to set the roster, set completion/status, or send a score.
 - It is recommended that an activity type like Online Course is used, as it is expected to support launching from a URL.. It is also possible to create a custom type copying online course and setting any desired properties in SumTotal.
 - Code: Unique identifier (**This is the code that will be entered over in NovoEd**)
 - Description:
 - Estimated Duration
- b. Metadata Required Fields
 - Content-Type: Select from the list
 3. Select Optional in the bottom right corner and choose Web-Based Training General
 - a. Launch Method: External Content
 - b. Launch URL: Enter the NovoEd Launch URL for the course.
 4. Move to Production

Link SumTotal Activity to a NovoEd course

Once the SumTotal activity has been created and moved to production it can be linked to the NovoEd Course.

To link a NovoEd course to a SumTotal Activity:

1. In SumTotal, go to the desired Activity and copy the “Activity Code” from the desired SumTotal Activity



2. In NovoEd, go to the desired course's Course Basics page and scroll down to the SumTotal Integration section

3. Enter the Activity Code from the SumTotal Activity in the corresponding field in NovoEd course basic edit page, and click "Validate". This will validate the SumTotal Activity exists and can be linked to NovoEd. If successful the Activity ID will automatically be populated.

4. Save changes.

This course in NovoEd is now linked to the SumTotal Activity to sync Enrollment and Completions!

If this course has existing enrollments and completions in NovoEd, these enrollments and completions should be synced after the linking is completed. If there are a large number of



users/and completions in the course or many courses are linked in a short period of time it may take a while to sync all registrations and completions due to API rate limits.

If there are existing registrations and completions, you must be sure that SumTotal Username is populated for users in org profile, or data may not sync correctly.

Managing the SumTotal Activity

The SumTotal admin may manage/edit the linked SumTotal Activity. For example, they may

- Update Metadata on the SumTotal Activity
- Control who can view/discover or self register in the SumTotal Activity
- Manually Register users in SumTotal
- Hide from discoverability when the course is closed.

Registration Workflow

If a learner discovers a NovoEd Course that is linked via the SumTotal integration, the learner can follow the link to NovoEd and, if not already enrolled in NovoEd, will be redirected to the course information page (aka course flyer).

From this page there is a button that will allow them to enroll in the course if they are entitled to based on the course registration type.

- If *open in organization*, anyone associated with the organization may self enroll
- If *open with entitlements*, they may self-enroll if they meet the entitlements defined on the course (e.g. open to users in a specific BU or department based on profile data)
- If *closed registration*, NovoEd will rely on SumTotal as the source of truth for who may enroll in a NovoEd course.
 - NovoEd will make an API call to SumTotal to validate if the user is on the Roster in SumTotal.
 - If yes they may self-register in NovoEd
 - If not they will not be able to.

If a learner is enrolled in NovoEd in a course linked to a SumTotal Activity, NovoEd will programatically check if they are on the Roster of the activity in SumTotal and add them if needed. This ensures that we can send completion to SumTotal even if they started from NovoEd as the entrypoint or were added manually by an Admin in NovoEd. This is a huge advantage over AICC based integrations that require entering from the LMS.

Please note only learner enrollments will be synced back to SumTotal, users with admin or mentor roles will not have enrollment sent to the SumTotal Roster

Sending Completions to Sumtotal

When a learner (user without an admin or mentor role) completes a NovoEd course, NovoEd will make an API call to update the completion status of the user in SumTotal. NovoEd will also send a score when points are used. Completion may be auto-completion or manual completion.



If a learner is unenrolled or withdraws, or fails to complete a course in NovoEd before it is closed, NovoEd will also update the Roster in SumTotal as appropriate. If unenrolled they will be removed from the roster. If they fail to complete when they lose access in NovoEd (course closed or time limit expired), their status will be updated based on progress made (No show or in progress).

SumTotal Registration and Completion Statuses

The following maps NovoEd NovoEd learner/course state to Registration status and completion status sent to SumTotal.

Course Status	Learner Status	SumTotal Registration Status	SumTotal Completion Status
Released, not closed	Enrolled, not started	Registered	False
Released, not closed	Enrolled, started	InProgress	False
Released, not closed	Enrolled, completed	Attended	True
Released, not closed	Unenrolled	Canceled	false
Closed	Enrolled, completed	Attended	True
Closed	Enrolled, in progress	Attended	False
Closed	Enrolled, not started	NoShow	False

Validation Scenarios

- Link an open production course on NovoEd to Sumtotal that has a release date in the past and that includes existing enrollments and completions. Validate that existing enrollments and completions sync to SumTotal after linking
- Validate that a user enrolled directly in NovoEd has the registration sent to SumTotal (add to roster on SumTotal Activity).
- Validate that a user who completes a course via autocompletion in NovoEd that is linked to SumTotal has that completion sent to SumTotal.
- Link a closed-registration released course on NovoEd to SumTotal to validate registration flow for closed courses in NovoEd
 - A learner who registered for the SumTotal Activity and follows the link form LMS should be automatically enrolled in the NovoEd course when landing there.



- A learner who lands directly in the NovoEd course but is NOT registered in SumTotal should **not** be able to self enroll or enter the closed registration course in NovoEd.
- Award manual completion to learner in a linked course and observe that that learner is marked as completed on SumTotal.
- Unenroll a user in NovoEd in a linked course. Validate the learner is removed/canceled from the roster in SumTotal
- Close a linked course in NovoEd with learners enrolled who have not yet completed validate the learner's status in SumTotal
 - If a learner was in progress when the course closes enrollment is updated with in progress
 - If the learner did not start the course (no date for last active) when the course closes, the enrollment is updated as NoShow