

Course Management

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Upload and Update Options

There are many circumstances in which a course must be updated at some point in the deployment life-cycle. iLMS offers a few options to accomplish this task, but selecting the right method of an update can be challenging without knowing the Pros and Cons of each option.

The options for course updates are listed below, continue reading to learn the how and why of each option.

1. **New Course**

Recommended if at all possible for best performance.

2. **New Version**

This option works well if you are mid-deployment and you've made a few minor changes to the same course.

3. **Update Content**

This option should be used only in extenuating circumstances when the content currently in use needs to be completely replaced during a deployment.

Please exercise caution as this option is only recommended if no file structure changes have taken place between copies of the course.

New Course

Uploading a New course is the cleanest option as far as preserving functionality, analytics, and user progress of its predecessor. This also mitigates any issues that could be caused by changes to the file structure between old and new courses.

This is because uploading your updated course as new course keeps them entirely separate. The new course would be its own entity with its own independent settings. User enrollment would not automatically carry over in this case.

This option is recommended if the previous course is **not** in active deployment as that is when it's easiest to get all the users enrolled and transitioned into the latest course.

If you are mid-deployment, transitioning enrolled users from the old course to the new course can pose a challenge.

The screenshot shows the iLMS interface with the 'Courses' tab selected. A dialog box titled 'Import A New SCORM/CMIS Course' is open, showing a dropdown menu with the following options: SCORM 1.2 & 2004, CMIS (xAPI), Articulate SCORM 1.2 & 2004, and Captivate SCORM 1.2 & 2004. The 'Choose File' button is highlighted. Below the dialog box is a table of existing courses.

	Created On	Analytics	Properties
1	10/28/2017		
2	01/18/2018		
3	06/05/2018		
4	01/18/2018		
5	01/18/2018		
6	06/23/2017		
7	06/08/2017		
8	03/08/2018		

To upload a New Course, follow the steps below:

1. From the Admin Portal navigate to the Courses Tab
2. Select SCORM/CMIS from the Menu
3. This will bring you to the course import tool as well as the list of all currently previously courses.
4. On this page, select the appropriate option from the drop-down. (Usually SCORM 1.2 & 2004)
5. Then click the "Choose File" button to select the course file you would like to import and hit "OK"

New Version

Uploading your updated content as a New Version of existing content is the second-safest option when it comes to preserving the integrity of the original course's file structure and reporting.

Adding a New Version to your original upload ensures the following.

- * Current enrollment and any enrollment rules associated with the previous course are applied to the new version seamlessly.
- * All users who are in progress can continue with their current version without being disturbed.
- * Any users launching training from that point forward will view the newest version

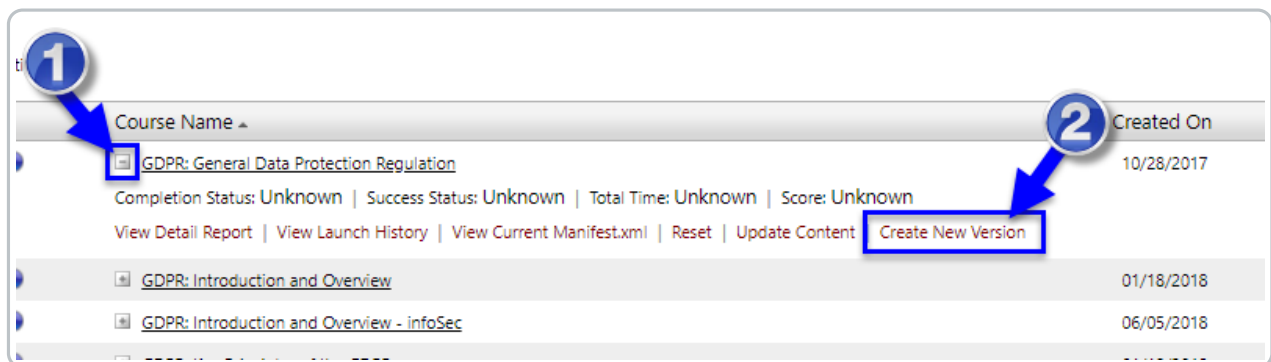
This option works well if you are mid-deployment and do not want to transition user enrollment to a new course.

If the updated course is structurally different from the previous course or has different settings or IDs in relation to the exam; however, this option could still negatively affect existing reporting and analytic or not function well under the older courses settings.

To upload your update as New Version of the existing course, follow the steps below:

1. From the Admin Portal navigate to the Courses Tab
2. Select SCORM/CMIS from the Menu
3. This will bring you to the course import tool as well as the list of all currently previously courses.

4. On this page, locate the course which you would like to update and click the " + " to the left of the title to expand options.
5. This will display a few nested course details and from here clicking "Create New Version" will take you to the appropriate upload screen to add a new version to the existing course.



Update Content

The final option for updating your course is to Update Content. This option has the most inherent risks as it overwrites the files of the existing course. Structural and setting differences between the new and old course will have the largest impact when using this option.

If considering this option, it will work best when changes between the old and new course are very minute, for example, text changes on a slide.

It is important to note that the old copy is **not** completely wiped away during this process

- only files for which there is a replacement copy in the new course will be overwritten in the old.
- any files in the new course which did not previously exist in the old will be added.
- Files in the old course, which do not have a counterpart in the new course, will remain.

A good thought exercise for determining if a content update is a right answer is to imagine performing the same process in the File Explorer on your desktop machine.

If you were to copy all the new files into the directory of the old course, how much would be replaced? how much would be added? how much of the old set of files would remain?

If the changes between new and old courses are indeed very minor. Then you can update the existing content by following the steps below:

1. From the Admin Portal navigate to the Courses Tab
2. Select SCORM/CMI5 from the Menu
3. This will bring you to the course import tool as well as the list of all currently previously courses.
4. On this page, locate the course which you would like to update and click the " + " to the left of the title to expand options.
5. This will display a few nested course details and from here clicking "Create New Version" will take you to the appropriate upload screen to add a new version to the existing course.

ctiv	Course Name	Created On
1	<div data-bbox="279 257 311 302">2</div> GDPR: General Data Protection Regulation Completion Status: Unknown Success Status: Unknown Total Time: Unknown Score: Unknown View Detail Report View Launch History View Current Manifest.xml Reset <div data-bbox="885 324 1029 369">Update Content</div> Create New Version	10/28/2017
	<div data-bbox="279 380 311 414">2</div> GDPR: Introduction and Overview 01/18/2018	01/18/2018
	<div data-bbox="279 425 311 456">2</div> GDPR: Introduction and Overview - infoSec 06/05/2018	06/05/2018

Bulk Update Transcript

Bulk Update Transcript enables the iLMS to integrate and retain historical course transcript data from another LMS through the use of properly formatted CSV files. This feature will create historical courses which are shell courses that have no content, but retain the course transcripts. It is most useful for cases in which course transcript data from one LMS needs to be integrated into the iLMS.

For most cases, this process needs only to be done once.

Tips and Best Practices

- Please upload a CSV file only.
- Download the template by clicking on Download Template link under the CSV Format section and fill in your data in the specified format. Refer to the Required Formats chart at the bottom of this page.
- To perform a quick one-time Bulk Update Transcript, upload the template, select Submit to Process, set a schedule under the Settings tab for Daily, today's date, and a few minutes past the current time.

Location:

Organization Admin -> Courses -> Bulk Update Transcript

Settings Sub-tab

Various settings are available to customize usage of the bulk update transcript service for file validation and processing.

Settings
File Upload
FTP Setup

☒ Enable Bulk Update Transcript

Schedule

The iLMS downloads files from your FTP server and executes bulk update transcript based on this schedule. The files are stored locally at [\\10.138.61.176\iLMSDevQADData\Content\Organizations\1255\FTP\BulkUpdateTranscript].

☐ Daily
☒ Weekly
☐ Monthly
☐ Yearly

Start Date (MM/DD/YYYY)
Start Time : (CST)

Enable Bulk Update Transcript

Check this box to turn on the automatic bulk update transcript process, removing the check will cease and desist previously set related processes. Be sure to un-check this box, once Bulk Update Transcript has finished running if a one-time set up is all that is needed.

Schedule

For updates that are needed on a regular schedule, the iLMS will retrieve CSV files according to the radio button selected: daily, weekly, monthly, or yearly.

Once the Start Date and Start Time fields are filled in, the selected date and time will specify the first run for the schedule; it will continue to run at the same time according to the time-frame set above.

Clicking on the blue radio button will clear the date, it will not turn off Bulk Update Transcript.

Note: One time only bulk update transcripts do not need to be set.

(This feature is helpful if 2 LMSs are running, and the iLMS needs to retrieve updated course transcripts regularly.)

Settings

Settings

☒ Create unrecognized courses and sessions

Prefix for new courses

☒ Set ILT session end date same as session start date if session end date is missing

☒ Set enrollment date and start date same as completion date if those dates are missing

☒ Update blank values for non mandatory fields in transcript

☐ Process only if all records are good

☒ Use default values for Room, Location, and Instructor if the respective values are missing

For each user record in the bulk update transcript CSV file, applicable business rules can be specified by checking one or more of the following options:

- Create Unrecognized Courses and Sessions**

Check here, if your CSV will contain courses and/or sessions that do not exist in iLMS.

This feature is helpful when needing to import historical transcript data without actually uploading the course associated with the transcript.

The field below is used to specify the prefix for these courses.

- Set ILT Session End Date same as Session Start Date if Session End Date is Missing (For Instructor Lead Courses Only)**

Check here, if the ILT session end date is missing and it is desired for this rule to fill in the ILT session end date to be the same as the session start date.

- **Set Enrollment Date and Start Date Same as Completion Date if those are Missing**
Check here, if the enrollment date and start date are missing, and it is desired for this rule to fill in the completion date to be the same as the enrollment date and start date.
- **Update Blank Values for Non Mandatory Fields in Transcript**
Checking this option overwrites blank values in non-mandatory iLMS fields if they are not populated in the CSV
- **Process only if all Records are Good**
Checking this option will prevent the file from processing if it contains records with errors.
- **Use Default Values for Room, Location, and Instructor if the Respective Values are Missing (For Instructor Lead Courses Only)**
Check here, if values for Room, Location and Instructor are missing in the CSV and it is desired to use their respective default values.

Notifications

Notifications
[Edit Notification Template](#)

☒ Notify the primary organization admin at each bulk update transcript.

☐ Also Notify

To enter more than one email address separate them using a comma.

Check this box will send a notification to the email address listed as primary organization administrator each time a bulk update transcript file processes

You can CC other recipients on the emails as well using the "Also Notify" option.

The Edit Notification Template link will open an editable sample notification email.

File Process Order

File Process Order

The iLMS will pick files for processing in the selected order.

Time Stamp

Descending

Use this menu to select the processing order of CSV files in the FTP directory by File Name or Time Stamp, either in Ascending or Descending order.

CSV Format

CSV Format

☒ Uploaded files are in the iLMS bulk update transcript standard format.
 [Download Template](#)

☐ Uploaded files must be converted to the iLMS bulk update transcript standard format.

Select whether to use the iLMS default CSV upload template

Click on the "Download Template" link to see the standard iLMS bulk update transcript template.

or

Convert an existing CSV file into a format compatible with iLMS.

Mapping Fields

When converting an existing CSV file, the fields of that file must be mapped 1:1 to the iLMS built-in fields and the column number specified according to the Upload Fields and Required Formats chart (bottom of this article).

☒ Uploaded files must be converted to the iLMS bulk update transcript standard format.

Mapping

iLMS Field	Foreign Field Name	Foreign Field Column #
Username *	<input type="text"/>	<input type="text"/>
Course Name *	<input type="text"/>	<input type="text"/>
Requirement Type	<input type="text"/>	<input type="text"/>
Enrollment Date *	<input type="text"/>	<input type="text"/>
Start Date	<input type="text"/>	<input type="text"/>
Due Date	<input type="text"/>	<input type="text"/>
License Expiration Date	<input type="text"/>	<input type="text"/>

File Upload Sub-Tab

Simply upload a CSV file with this drag and drop feature or through the Select a file option to validate and process it by the bulk update transcript service.

Once the desired file has been uploaded and saved, click to check [Submit to Process](#) to indicate that file should be processed during the next scheduled update.

Dashboard

Users

Courses

Applications

Reports

Logs

Settings

Bulk Update Transcript [?](#)

[View Log](#)

Settings

File Upload

FTP Setup

Upload File

Note: Please upload a file of with an extension of .CSV. You can also upload a .PGP or .GPG file if PGP decryption is enabled. (Please enable the Bulk Update Transcript on the Settings tab to start processing the file.)

Drop Files Here

OR

Select a file

Save Uploaded File

Uploaded File Details

These files are already uploaded and waiting to be processed. The file validation process runs every hour. Next bulk update transcript process is not yet scheduled.

File Name	Upload Date & Time	File Validation St
No record found.		

Page size: 100 ⏪ ⏩ Page: 1 of 1 ⏪ ⏩

Refresh

Upload File Upload a .CSV file created according to the selected format:
iLMS default format OR custom format as per mapping details.

Just select one or more .CSV files, then drag and drop them in the designated area.

They will be uploaded simultaneously.

To start processing the file, Bulk Update Transcript under the Settings tab must be enabled, and a time must be set.

Certain fields are required when updating transcripts in the system:

Fields marked with an * in the default template or If using a custom CSV, the mapping section, are required in order to process.

- **Username**

This will be the unique identifier field as set for your users. Email or Employee ID.

Learn More Here: [iLMS Fields and Unique Identifier](#)

- **Course Name**

Name of the course to be updated in the transcript data

- **Course Status**

Status of the course to be updated in the LMS

- **Enrollment Date**

(Required only if records belong to a certification-enabled course)

- **Is Certification Enable+**

(Only required if records belong to a certification-enabled course)

- **Session Start Date, Session End Date, Room, Location**

(Only required if records belong to an ILT course)

Note: The record limit is 20,001 records per CSV file.

Larger files can be broken up into smaller CSV files and processed in batches.

Uploaded File Details

Displays the details of the uploaded files from the iLMS and the upcoming schedules for the next bulk update transcript process.

Once processed successfully, your file will disappear from the queue awaiting processing.

Uploaded File Details

Already uploaded files which are yet to be processed. File validation process runs every hour. Next bulk update transcript process is scheduled at Tuesday, October 01, 2013 6:47 PM IST

File Name	Upload Date & Time	File Validation Status	Validation Report	Submit To Process	Remove
201309290927332068_BUTecomBasic25Courses_Corrected.csv	9/29/2013 9:27:34 AM	Pending			
201309271443231099_5_BUT_Good_Records.csv	9/27/2013 2:43:23 PM	Completed	View Details		
201309261800445831_2NMBTFile_B9.csv	9/26/2013 6:00:44 PM	Completed	View Details		
201309261620233221_BulkTranscriptTemplate.csv	9/26/2013 4:20:23 PM	Completed	View Details		
201309261613147172_BulkTranscriptTemplate.csv	9/26/2013 4:14:12 PM	Completed	View Details		
201309261606371835_BulkTranscriptTemplate.csv.pgp	9/26/2013 4:06:37 PM	Completed	View Details		
201309261549299327_BulkTranscriptTemplate.csv.pgp	9/26/2013 3:52:19 PM	Completed	View Details		
201309251750493179_NIK_BulkTranscriptTemplate.csv.pgp	9/25/2013 5:50:49 PM	Completed	View Details		
201309251749144059_NIK_BulkTranscriptTemplate.csv	9/25/2013 5:49:39 PM	Completed	View Details		
201309251739032439_BulkTranscriptTemplate.csv	9/25/2013 5:39:03 PM	Completed	View Details		

Page size: Page: of 5
Displaying page 1 of 5, items 1 to 10 of 41

Refresh

- **File Name**

Uploaded files with corresponding timestamps will be available as links. View and download the file by clicking on each link.

- **Upload Date and Time**

Displays file upload date and time into system.

- **File Validation Status**

Displays the following status

- **Pending File**

Yet to be validated

- **In-Progress**

File is validating

- **Completed**

Validation complete

- **Validation Report**

Displays a View Details link after file validation completes.

- **Submit To Process**

Click on the check mark to submit files for bulk transcript processing. Pending files can also be submitted files for processing.

- **Remove**

Click on the red button to remove the file at any time before the processing starts. A validation pop-up will appear.

- **Refresh**

Click this button to refresh the grid page.

FTP Setup Tab

The details for ones FTP server, such as credentials and connection types, can be configured here.

SettingsFile UploadFTP Setup

* Fields are mandatory

Save & Check Connection

The iLMS checks for new files on your FTP server based on the credentials and schedule below.

FTP Details

FTP Type

☐ FTP+SSL
☐ FTP+SSH
☒ FTP

Host Name *

Port *

FTP Mode

Passive Mode

Remote Directory

/

☐ Anonymous Login

Username *

Password *

FTP Details

- **Save Check Connection**

After entering the company's FTP server details, click on this link in the upper right corner to test the connection and ensure it is functioning properly.

- **FTP Type**

Select one of the radio buttons: FTP+SSL, FTP+SSH, or plain FTP. Each type will open its own extended window with designated options below. Please Note: Plain FTP is unencrypted and insecure.

- **Host Name**

Enter the address for the FTP server (either a DNS address, such as myftp.mycompany.com or a publicly available IP address.)

- **Port**

Enter the FTP port to which the FTP server is set to bind.

- **FTP Mode**

Select Active or Passive, depending on the server configuration.

- **Remote Directory**

Enter the directory that contains the applicable .CSV files, with / being the default root directory.

- **Anonymous Login**

Check here, if the server allows this option and an anonymous FTP login is desired.

- **Username**

Specify the FTP user here.

- **Password**

Specify the FTP users password here.

Proxy Settings

- **Use Proxy**

Checking this box will expand the mandatory fields that enable the use of a proxy server to connect to the FTP server.

Otherwise, this feature will not be activated.

Proxy Settings

☒ Use Proxy

Proxy Name *

Port *

1

Proxy Type *

HttpConnect

Username *

Password *

- **Proxy Name**

Enter the DNS name or IP address for the proxy server.

- **Port**

Enter the port that is configured for the proxy server.

- **Proxy Type**

Select either Socks4, Socks4a, Socks5, HttpConnect, FtpSite, FtpUser, or Ftp Open from the drop down menu.

- **Username**

Enter the username to authenticate to the proxy server.

Password

Enter the password for the user to authenticate to the proxy server.

SSL and SSH settings

- **If using FTP+SSL (FTPS)**

- Upload the SSL certificate for the FTP server and optionally provide its password.
- Select either Implicit or Explicit TLS or SSL as a security method, and optionally define which TLS or SSL protocols are allowed.
- Also, one can choose whether to use the Clear Command Channel command for the iLMSs FTP client connection.

FTP + SSL Settings
Certificate Password
Security *
Allowed Protocols ☐ TLS 1.0 ☐ SSL 3.0
☐ Clear Command Channel

- **If using FTP+SSH (SFTP)**

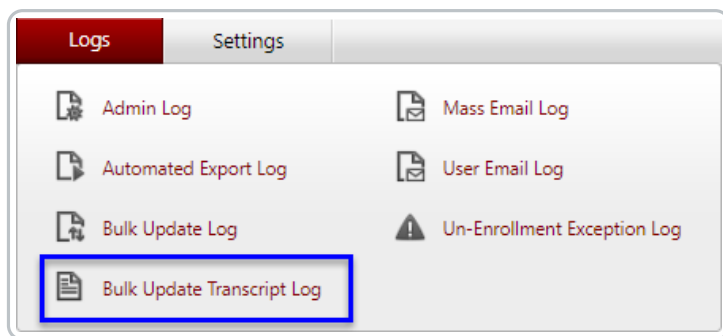
- The private SSH key used for the server can be uploaded, and the password can be optionally provided.

FTP + SSH Settings
Private Key Password

- **If using plain FTP**

- No further configuration is necessary on this form
- Inspired will need to white-list the host name or IP address of your FTP connection to allow access.
- Plain FTP is the least secure option, and therefore, is not recommended.

Bulk Update Transcript Log



The bulk update transcript log page displays all logs of successful and unsuccessful bulk update transcript processes. During the bulk update transcript process, improperly formatted records are not processed.

If the bulk update transcript is performed, an error log is generated as well as a CSV file with all of the improperly formatted records listed under "Bad Records"

In addition, a CSV file is created with all of the successfully processed records displayed as "Good Records"

Bulk Update Transcript Log			
<i>The next scan is scheduled on: Friday, December 14, 2018 4:44 PM EST</i>			
Total Records: 6			
Uploaded File Name	Processed Date	Result	Log Files
201809271100548473_BulkTranscriptLMSTemplate.csv	9/27/2018 5:44:14 PM	Unsuccessful	View Log File
201709141542331796_BulkTranscriptGood_Records.csv	9/14/2017 5:44:45 PM	Unsuccessful	View Log File Download Bad Records File
201611111158078274_BulkTranscriptGood_Records.csv	11/11/2016 1:00:55 PM	Successful	View Log File Download Good Records File
201608091035052124_ .csv	8/9/2016 11:42:02 AM	Successful	View Log File Download Good Records File
201606240910285110_Bulk_update_Transcript_Good_records_Test.csv	6/24/2016 10:13:35 AM	Successful	View Log File Download Good Records File
201606160928035706_Bulk_update_Transcript_Good_records - Copy.csv	6/16/2016 10:30:39 AM	Successful	View Log File Download Good Records File
Page size: 100 Page: 1			

- **View Log File**

The log file displays basic facts about the bulk transcript update and a list of errors. Types of errors include:

- **Missing Field Information**

The record was missing information in one of the required fields.

- **Course Does Not Exist**

The Create unrecognized courses and session checkbox was not checked. This error will occur when a Course or Session for the given transcript record does not already exist in the system.

- **Download Good Records File**

Displays the error-free records that were processed successfully by the bulk transcript update.

- **Download Bad Records File**

Displays the bad records that failed during the bulk transcript update process. Use this file to make corrections, then upload and update the transcript for the remaining records.

Note: This file contains an extra column containing error codes for all applicable rows in the CSV file. The extra column must be removed prior to uploading it into the system. If the error codes column is not removed, the system will reject the file.

Required Field Formats for Bulk Transcript Update

When converting an existing CSV file for the purposes of bulk updates, the fields of that file must be mapped 1:1 to the iLMS built-in fields and the

Upload Field Required Formats

Field name	Data type	Min	Max	Comments/Actions
Username *	Character	1	200	
Course Name *	Character	1	150	Including Prefix specified on Settings page
Requirement Type	Character	1	1	"M" OR "O" (Mandatory/Optional)
Enrollment Date+	DateTime	-	-	Must be in the following format: MM/DD/YYYY
Start Date	DateTime	-	-	Must be in the following format: MM/DD/YYYY
Due Date	DateTime	-	-	Must be in the following format: MM/DD/YYYY
License Expiration Date	DateTime	-	-	Must be in the following format: MM/DD/YYYY
Completion Date	DateTime	-	-	Must be in the following format: MM/DD/YYYY
Score	Number	1	5	Between 1 and 100.
Time Spent	Number	1	50	
Course Status *	Character	1	1	N - Not Started, I - In Progress,
				C - Completed, P - Pass, F - Fail,
				W - Waived
Certification Expiration Date	DateTime	-	-	Must be in the following format: MM/DD/YYYY
Certificate Number	Character	1	50	
Session Start Date+	DateTime	-	-	Must be in the following format: MM/DD/YYYY
Session Start Time	DateTime	-	-	Must be in the following format: MM/DD/YYYY
Session End Date+	DateTime	-	-	Must be in the following format: MM/DD/YYYY
Session End	DateTime	-	-	Must be in the following format: MM/DD/YYYY

Field name	Data type	Min	Max	Comments/Actions
Instructor Usernames	Character	1	1000	Value can be Email ID Or Employee ID based on Unique Identifier
Location+	Character	1	255	
Room+	Character	1	255	
Is Certification Enable+	Character	1	1	If record belongs to certificate enable course then place 1 in this field otherwise place 0 or leave blank
Is Curriculum	Character	1	1	To create a curriculum with a name specified in the Course Name column, place 1 in this column, otherwise place 0 or leave blank
Curriculum Name	Character	1	150	To add a course specified in the Course Name column, enter curriculum name in this field. The course will be added in this curriculum.
Action	Character	1	1	Value can be "I" for insert or "U" for update records or leave blank

Catalog in Learner Center

The course catalog provides an easy way to organize courses into searchable categories. You can turn the catalog on or off, choose which courses to display in the catalog, and which courses to hide from the catalog.

Users can browse or search the catalog, and depending on settings, self-enroll in courses.

Location:

Courses Tab -> Catalog



Catalog Sub-Tab

Catalog ?

Catalog Settings

Note: Use your right mouse button to add, rename or delete categories. To move categories or courses...

Select Language: English

Search Criteria

☒ Courses in Learner Center Catalog ☒ Courses NOT in Learner Center Catalog

☒ Curricula in Learner Center Catalog ☒ Curricula NOT in Learner Center Catalog

Go

To edit the catalog and its visibility to learners go to the Courses Tab and select Catalog.

Here on the Catalog tab you can see all courses in your catalog.

There are check-boxes to filter the courses displayed to include courses and curricula that are visible or not visible to learners.

Settings Sub-Tab

Catalog ?

Catalog **Settings**

Settings for Administrators

☒ Hide All Folders When Empty

Settings for the Learner Center

☒ Display Catalog in Learner Center

Save

Allows you to display or not display the catalog in the Learner Center so that if you do not want to use this feature you don't have to.

Only courses set to display in the catalog will be visible to users.

(See below for details).

To achieve a catalog in which users can browse courses and self enroll, learn more here: [User Self Enrollment](#)

Catalog Settings for Courses

Each course has the settings explained below. To access the settings for a particular course, navigate to the Courses Tab -> SCORM/CMIS and click the title of the course you'd like to edit.

iComposer [SCORM]

AP-101 Phishproof

- Settings
 - General
 - SCORM Properties
 - Catalog**
 - Certification
 - Owner
 - Enrollment & Due Dates
 - Email Notifications
 - Prerequisites
- Content
- Certificate

Catalog Settings

Display this course in the Learner Center Catalog	<input type="checkbox"/>
Display this course in the Portal Catalog	<input type="checkbox"/>
Show Author/Instructor name in course description	<input type="checkbox"/>
Show Author/Instructor name in course description as Email link	<input type="checkbox"/>

Location in Catalog
 A course, curriculum, or event can be placed in the root of the catalog or in a particular category or sub-category. To change the location click on the desired category or sub-category and click save. To change the catalog categories please go to Catalog on the Courses tab.
 Current Location in Catalog: _Erin Catalog (Root)

Remove Course Location

Save

- **Display this course in Learner Center Catalog**
 By default all courses are not displayed in the Learner Center catalog. Use this option to display a particular course.
- **Show Author/Instructor name in course description**
 Shows the name of the course creator / owner in the catalog. This is ideal of instructor-led training.
- **Show Author/Instructor name in course description as Email link**
 Allows users to contact the author / instructor via email. This is ideal of instructor-led training.
- **Course Location**
 Allows you to set the location of this particular course in the catalog.

Enrollment Settings

Each course has the settings explained below.

iComposer [SCORM]

AP-101 Phishproof

- Settings
 - General
 - SCORM Properties
 - Catalog
 - Certification
 - Owner
 - Enrollment & Due Dates**
 - Email Notifications
 - Prerequisites
- Content
- Certificate

Enrollment Settings

Enrollment Settings | Enrollment Rules | Due Date Rules | Current Enrollment | Enroll in Course

<input type="radio"/>	Open Enrollment Registered users can self-enroll.
<input type="radio"/>	Open Enrollment with eCommerce Users can self-enroll but must pay for the course. Price (\$): <input type="text"/> <input type="checkbox"/> Enable Volume Discounts
<input checked="" type="radio"/>	Closed Enrollment Users must be enrolled by an admin. <input type="checkbox"/> Allow users to request enrollment through the catalog

License Period

☐ Enable License Period

Save

- **Open Enrollment**
 Registered Users can self-enroll Ideal for optional training, this setting will display an enroll link in the course description allowing the user to self-enroll. Before a user starts a course he or she can un-enroll.
- **Closed Enrollment**
 Users must be enrolled by an admin Ideal for mandatory training, this setting prevents the user from self-enrolling, allowing the admin to control who is enrolled.
- **Allow users to request enrollment through the catalog**
 This allows users to email an enrollment request for closed enrollment courses. For example, if you have a

limited number of licenses you might make a course closed enrollment and then allow individual users to request enrollment via email. A request enrollment link is displayed in the catalog. On clicking the link an email opens up addressed to the primary org admin account with the course title in the subject line.

Due Dates

Due dates allow organizations to set a deadline by which training must be completed.

In iLMS you can set up reminders to be sent to users based on whether or not the user has exceeded the due date, ensuring that training completion remains top of mind. (Learn about automatic reminders here: [Automatic Reminders](#))

Due dates can be set in a number of ways.

The way a due date is set is typically dependent on the method by which the user(s) is enrolled.

Direct

If a user is enrolled into a course via their profile, through the individual course, in bulk by csv, or by the Learning Path, their enrollment path will be listed as "direct".

If a user's enrollment is direct then the user will be assigned the **default due date** unless otherwise specified.

Learn about these enrollment methods here: [Course Enrollment Methods](#)

Curriculum

If a user is enrolled into a course as a result of being assigned a curriculum, it will still apply the **default due date** for each course, but the curriculum will also have its own default due date set in the Curriculum settings.

Learn More about Curricula: [Curriculum Enrollment](#)

Group

If a user is enrolled into a course/curriculum via a group the group can specify its own due date rules that will override the defaults set for the course/curriculum.

Learn more about Group Course Assignment: [Group Course Enrollment](#)

Exceptions to the Default Due date can also be altered for specific regions, divisions, and departments or for **individual users** to fit your organization's needs. This can be done with the settings pages shown below.

Default Due Date

The default due date set for a particular course is set in the course settings.

To change these settings first locate the course, click the course title, and go to "General" under settings in the left-hand column.

Here you can set the course to be due a certain number of days after assignment, or on a specific date if desired.

iComposer
[SCORM]

AP-101 Phishproof

Settings

General

SCORM Properties

Catalog

Certification

Owner

Enrollment & Due Dates

Email Notifications

Prerequisites

Content

Certificate

General Settings ?

Language: English

* Fields are mandatory

Name *	AP-101 Phishproof
Code *	DefaultCourseCode
Default Requirement Type	<input checked="" type="radio"/> Mandatory <input type="radio"/> Optional
Version Type	Multiple Version
Credits	
Hours	
Default Due Date	<input type="radio"/> None <input type="radio"/> Due <input type="text"/> Days after <input type="text"/> Enrollment Date (Time Before Due) <input checked="" type="radio"/> All Enrolled users Due on this Day <input type="text"/> 05/10/2016
Due Date Actions	<input type="checkbox"/> When Past Due Change Status to <input type="text"/> Failed <input type="checkbox"/> When Past Due Lock Course Access <input checked="" type="checkbox"/> Send Email Reminder <input type="text"/> Day(s) Before the Course Is Due <input checked="" type="checkbox"/> Send Email Reminder on Due Date <input checked="" type="checkbox"/> Send Email Reminder <input type="text"/> Day(s) After the Course Is Past Due
Course Seats	<input checked="" type="radio"/> Unlimited <input type="radio"/> <input type="text"/> Users per Organization

Other Due Date Rules

Due dates can apply to all users who are enrolled in the course, or to suit the specific needs of an individual, group, or department other rules can be created for just those segments of users. To set due dates that deviate from the default, go to the course settings, select "Enrollment & Due Dates" from the left column, and go to the "Due Dates" tab. The screenshot below provides more details on how to create these rules.

1 Enrollment & Due Dates

2 Due Date Rules

Add Due Date

For All Enrolled Users
For a Group
For a Department
For an Individual

Action	Due Date	Edit	Remove
All Enrolled Users	Course	05/10/2016	

You can add due dates that cover specific individuals, groups, departments, or create an rule to cover all users if one does not already exist.

This option allows you to edit existing rules.

Modifying Due Dates Post-Enrollment

If for any reason the due date(s) set upon enrollment need to be changed, this can be done for an individual user by navigating to their transcript and changing the date manually.

User Profile and Transcript

To change the date for several users an admin can utilize features found in the following locations:

User Search and Filter (Best if date change is for one course, multiple users)

Bulk Update Course Transcripts (Best if needing to update dates for multiple courses, multiple users)

Copy Courses

The copy course tool allows you to copy courses.

Location:

Courses Tab -> Copy Content



New course copies appear as a separate course in the course list and the new courses have their own unique content / media files.

This is a useful tool when you must give training on an annual basis or require varied course settings for whatever reason.

For example, you can create a course and name it Compliance 2008.

At the end of the year when it must be taken again you can copy it and name it Compliance 2009.

This way, everyone will have a record of taking both Compliance 2008 and Compliance 2009.

Copy Course, Module, Lesson or Page

Operation

Select Operation ▼ Copy Course

Source

Course Name ▼ Select Course

Course Version ▼ Select Version

Destination Properties

New Course Name

New Course Code

New Course Version Type ☒ Single Version ☐ Multiple Version

Save

Operation

This dropdown lets you select the desired action to perform, in most cases this will be used to "Copy Course". The other options apply to components of iComposer courses, and older course-building tool that resides within iLMS.

Source

- **Course Name**
This option allows you to select the course in the system of which you'd like to make a copy.
- **Course Version**
Since courses often have multiple versions if there have been updates to the material, you also have the ability to select a particular version of the course to copy. Usually you'll want to the most recent copy.
- **Destination Properties**

New Course Name/ New Course Code

Allows you to input the new course name and course code.

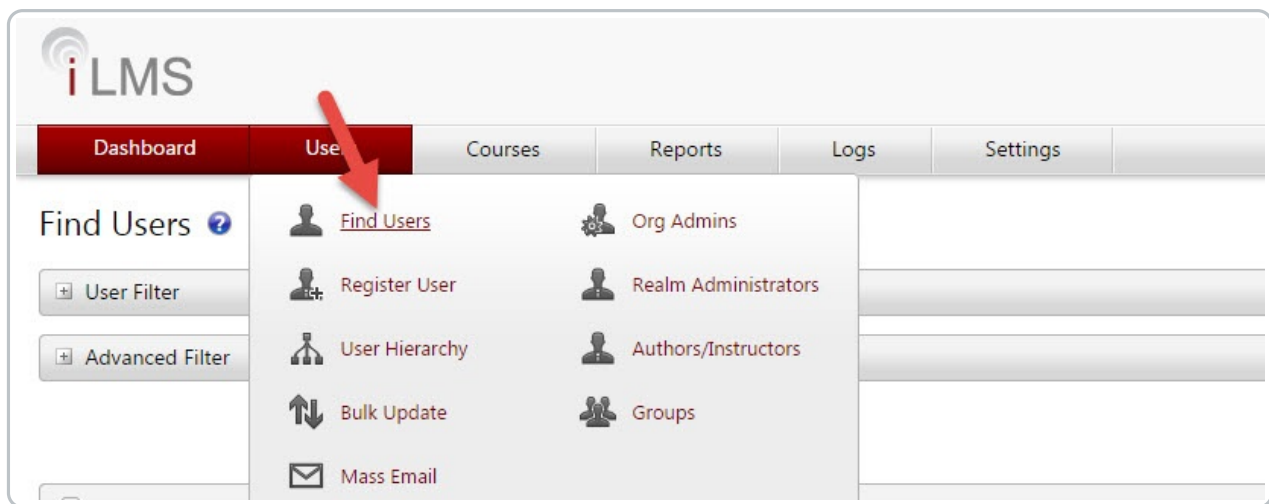
- **New Course Version Type**
This option is often self-selects, based on chosen course.
If selecting a regular course file, this will default to "Multiple Version"

Resetting a user that has failed their course

If a user's course is in Completed status, whether they passed or failed, iLMS will lock their progress. In this case, an administrator will have to reset their course progress to "Not Started" for a learner to retake the course.

1. Find the Learner's Profile

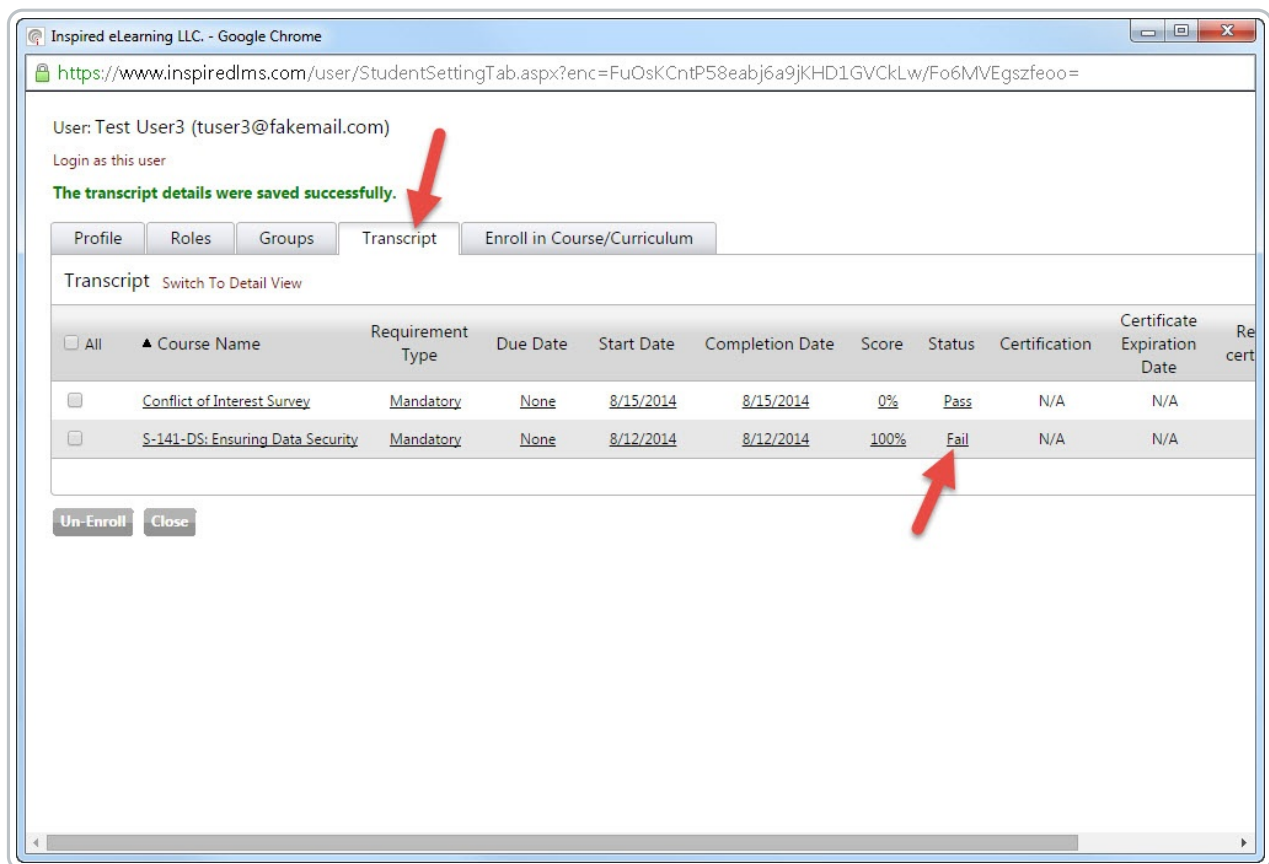
Navigate to Users -> Find Users to search for the user.



Click on the user name when the search is complete to view their transcript information.

2. Navigate to Transcript

Navigate to Transcript tab which will show the status of all courses enrolled to the user. Click on the word "Fail" and a pop-up will open to allow you to change the status.



3. Change Course Status

Change the status to "Not Started" from the drop down box and click "Update" to save the change. The user can now re-take their course.

Change Transcript Details - Google Chrome

<https://www.inspiredlms.com/user/ChangeTranscriptDetailsF>

Note: The information provided will be applied to the user.

Course Name: S-141-DS: Ensuring Data Security
Usage: 93 of Unlimited Days.

License Expiration: (MM/DD/YYYY)

Requirement Type: Mandatory

Enrollment Date: 08/12/2014 (MM/DD/YYYY)

Start Date: 08/12/2014 (MM/DD/YYYY)

Due Date: (MM/DD/YYYY)

Completion Date: 08/12/2014 (MM/DD/YYYY)

Score: 100 %

Status: Fail

Status:

Change to:

- Not Started
- Pass
- Fail
- Waived

☐ Send Transcript Change

Custom Message (Max 2000):

Update Cancel

Un-Enrollment rules

Depending on the **context**, one of two rules will apply to un-enrollment actions, which are outlined in a table below. The general rule, **transcript integrity**, states that any actions taken by the user must be kept in the transcript unless explicitly removed by an admin. These actions include starting a course, completing a course, completing an exam, etc.

Un-Enrollment

The transcript integrity rule works in tandem with the **group integrity rule**, which states that if any user is a member of a group or curriculum they must have all courses in the group or curriculum.

To un-enroll a user from one of these courses requires removing them from the group or curriculum.

The final factor affecting un-enrollment is that a course can have multiple enrollment paths.

Each course has an **enrollment path**, which defines how the user came to be enrolled in the course, e.g. direct or via a group, curriculum, or department.

Since a single course can have multiple enrollment paths, to remove a course from a user, all enrollment paths must be removed.

The enrollment paths for a particular course are displayed on the "Enroll in Course" tab of a user's profile (see: [User Profile and Transcript](#))

Intent, Expectation, and the Exception Log

How the iLMS behaves depends on the **intent and expectation** of the admin as defined by the context.

There are two scenarios:

1. An admin wishes to **explicitly** remove a specific course from a specific user.

The admin can do this by removing one enrollment path at a time.

In these cases a **CSV exception log file** is created so that anyone still enrolled after the action is noted as well as their full enrollment path.

The admin can use this file to complete the un-enrollment process.

2. An admin wishes to remove a course from a group, curriculum, but not any specific user (**implicit** un-enrollment).

In this case no exception log file is generated.

Action Contexts

Please see the rules table below to fully understand the action contexts

Action	Intent and Expectation	Which Rule Is Followed	Generate Exception Log?
Un-Enroll course via 1. Find Users 2. Transcript 3. Bulk un-enroll by CSV	To explicitly remove a specific course from a specific user.	Rule 2	Yes due to explicit intent
Un-Enroll curriculum from 1. Find Users 2. Transcript 3. Bulk un-enroll by CSV	To explicitly remove a specific curriculum and its courses from a specific user.	Curriculum Object: Rule 2 Sub-Courses: Rule 1	Yes due to explicit intent
Remove a course from a group	To remove a course from an object, not any specific user. (implicit un-enrollment)	Rule 1	No
Remove a curriculum from a group or parent curriculum	To remove a curriculum from an object, not any specific user. (implicit un-enrollment)	Curriculum Object: Rule 1 Sub-Courses: Rule 1	No
Remove a course from a curriculum	To remove a course from an object, not any specific user. (implicit un-enrollment)	Rule 1	No

Rules

Rule 1:	Rule 2:
<p>A course cannot be removed from a user if any of these conditions are true:</p> <ol style="list-style-type: none">1. The course is available in another group, curriculum, or department in which they are enrolled.2. If the courses status is in-progress or complete. <p>In other words, only courses that are not started and contain no other enrollment path will be removed. This preserves transcript and group integrity.</p>	<p>A course cannot be removed from a user if any of these conditions are true:</p> <ol style="list-style-type: none">1. The course is a part of the any curriculum, group, or department in which he or she is enrolled. <p>In other words, if the course contains no other enrollment paths it will be removed from the user irrespective of its status (not started, in-progress, passed, and failed courses will be removed if no other enrollment path exists). This preserves group integrity but allows the admin to explicitly remove history from the transcript.</p>

Deleting a Group or Curriculum

Action	Rules
Deleting a course	Currently a course cannot be deleted if it is assigned to a user.
Deleting a group	<p>Un-Enrollment Rule 1</p> <p>Offer to un-enroll users from "not started" courses or to leave the enrollment as it is (changed from direct enrollment, if necessary, for group courses).</p>
Deleting a curriculum	<p>Un-Enrollment Rule 1</p> <p>Offer to un-enroll users from "not started" courses or to leave the enrollment as it is (changed from direct enrollment, if necessary, for curriculum courses).</p> <p><i>*A curriculum cannot be deleted if it is nested.</i></p>