Update an Online Course

There are two ways to update an online course: Create a Version or Modify the content.

If you changed the course, for example, fixed a navigation issue, replaced a graphic, added a section of the course, or if the current version is SCORM 1.2 and the new version is SCORM 2004, use the Create Version process.

If you made only minor updates and have an identical file structure and manifest to the current course, you can replace the online course without creating a new version, using the Modify Content option. Minor change examples: fixing a typo on a slide, a typo within the captioning, or replacing a file in resources.

⚠️ **Always test your online course in the Cornerstone Pilot portal or SCORM Cloud to make sure it functions correctly before uploading it into Production.**

Online course versioning includes three main processes:

1) Replacing the current version of the course with the new version.
2) Configuring options to determine which user transcripts, if any, should be updated to the new version of the course.
3) Automatically creating a new version of each curriculum that contains the course.

💡 You can change the Course Title, Provider, Training Hours, Description, and other details associated with an online course without creating a new version, via the Course Console page.

Prepare to Version an Online Course

Before uploading a new version of an online course, do some research so you can be ready to make good choices. Several factors will affect the selections you make when versioning an online course:

- Is the new version of the course equivalent to all prior versions of the course, none, or just the most recent version?
- Are the changes to the course significant enough to require users in a Completed status to be assigned to take the new version?
- Is the course included in any curricula? If so, has the online course always been included in all prior versions of the curriculum, or was it only added to more recent versions of the curriculum structure?
- Has the course been assigned to any users via a dynamic learning assignment that is still active? What are the dynamic re-assignment settings for that learning assignment?
- Is the online course associated with any training equivalencies or custom approval workflows?

Version an Online Course

1. From the menu, select **Admin > Catalog > Course Catalog.**
2. Search for your Training Title.
3. Locate the training on the search results page and select the **Training Title**.

4. On the Course Console page, select the **dropdown** icon. Select **Create Version**.
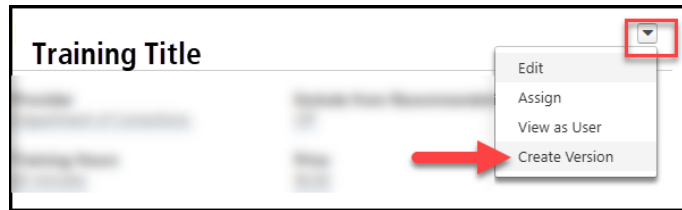
5. Upload File: Select the **Add Files** button or drag and drop your zip file.
   a. Wait while the file uploads. If you leave this page, you will lose your work.
6. The file status changes to Processing.
   a. You may stay on this page or return later by selecting the Resume button.
   b. Select the **Refresh Status** button to update the status.
7. If there are problems with the upload, the status changes to Uploaded with Errors.
   a. Select the **View Errors** button to view the reasons for the upload errors.
   b. Select the **Delete Upload** button to remove the problem zip file.
8. The file status changes to Content Ready.
   a. Review the Training Title, Description, Training Hours, and Enable for Mobile App fields. If information is incorrect or missing, update the field with the correct information.
9. Select the **Next** button to continue.
10. Version Options: *Do not select the Append option*. This is turned off by default because it will allow two versions of the same online course to be available at the same time.
11. The Effective Date defaults to the current date.
12. Impacted Curricula: This displays the number of curricula that contain the online course.
13. Due Date: There are four types of due date options. The option selected will apply to the users in the upcoming user selection section.
    a. Apply Previous Version Due Date Criteria:
       i. The due date criteria from the previous version will be applied to the new version. This applies to the due date associated with a standalone course or a course within a curriculum.
          • Example: If the criteria was "10 days from Date Assigned" for the previous version, the new due date would be the versioning effective date plus 10 days.

       ii. Apply Exact Due Date:
          • Select this checkbox to apply an exact due date from the previous version for a standalone course to the new version.
    b. Specific Date - The following behaviors result from this selection:
       i. A standalone course receives a fixed due date.
       ii. A course within a curriculum will display a fixed date within the curriculum structure.
    c. Relative Date - The following behaviors result from this selection:
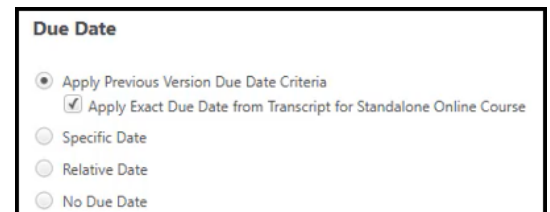
      i.   A standalone course receives a relative due date.

      ii.   A course within a curriculum will display a relative due date within the curriculum structure.

    d. No Due Date - The following behaviors result from this selection:

      i.   A standalone course will show no due date.

      ii.   A course within a curriculum will not display a due date within the curriculum structure.

14. Version Equivalency:

    a. Requires Retraining

      i.   When selected, the new version will not be equivalent to the previous version. Meaning users who are assigned the new version must complete the new version even if they completed the previous version.

          • If you include users in the Completed status in the upcoming user selection section, those users will have the new version placed on their transcript in a Registered status.

    b. Completed Equivalent

      i.   When selected, the new version will be equivalent to the previous active version. This means that users who are assigned the new version do not have to complete it if they completed the previous version.

          • If you include users in the Completed status in the upcoming user selection section, they will have the new version placed on their transcript in a Completed Equivalent status.

          • The completion date logic of a training with a Completed Equivalent status will match the completion date of the training that triggered Completed Equivalent status.

15. Comments: In the Comments text box, enter an explanation. For example: "Fixed issue with tracking progress after the first scenario. No changes to training content."

    a. This comment will appear in the Audit History and Transcript History.

16. User Filter Preferences – In this section, you will select options to determine which users, if any, receive the new version.

    a. Training Version: This lets you select which version of the online course should be on a user's transcript for them to receive the new version. This defaults to All Versions.

      i.   If you do not want to apply the new version to all versions, select the dropdown icon to make a different choice.

    b. Training Status: This lets you select which groups of users with the online course on their transcript should receive the new version. For example, you may only want to include users in a Not Started or In Progress status and exclude users in a Completed status. Or, if you do not need to include any users with the course on their transcript and need to make the updated version of the course apply only to future users, exclude all statuses.

    c. Assignment Type:

      i.   Users with Previous Version On Transcript: If selected, all users, regardless of the original assignment method, will receive the new version.

      ii.   Users assigned by Dynamic Learning Assignment: If selected, it will include only users who were assigned the course by Dynamic Learning Assignments.

      iii.   Define users by OUs: If selected, you can select specific Organizational Units (OUs) to assign the new version to.

17. User List: Displays the users who are set to receive the new online course version.
    a. Uncheck the checkbox next to the users you don't want to receive the new version. This option is not available if the effective date is in the future.
    b. If you change any of your filter options, select the **Refresh User List** button to see a new updated list of users.

⚠ If the course versioning will impact a large number of users, it is better to do this late in the day, so it has time to process overnight.

18. Select the **Publish** button to publish your online course. A notification appears at the top of the page: "New version has been created. Please wait while the version is being published."
19. When the new version is successfully published, the version number and the Last Modified Date are updated, and the new online course version is active in the portal.
20. When an online course is versioned, all metadata from the original course is copied to the new version <u>except</u> for the following:
    - Pricing - Prices must be configured for the new version.
    - Approval Workflows - Any applicable approval workflows must be configured for the new version.
    - Training Equivalencies - Any applicable training equivalencies must be configured for the new version.
    a. To update data for the new version, search for the training in the Course Catalog, navigate to the Course Console page, and select **Edit** from the Actions column.

Online Course Versioning Dashboard

To review an online course's versioning settings and impacted users, use the Versioning Dashboard.

1. On the Course Console page, select the Options **dropdown** icon to the far right of the Training Title. Select **Version Details**. Note: This page opens in a new tab.

2. Since versioning an online course included in curricula can take more time, you can use the Versioning Dashboard page to monitor progress.

💡 If you mistakenly selected Requires Retraining, you can fix this using the Version Equivalency link on the Course Console page. This method of applying version equivalency applies to only the prior version.

💡 To apply version equivalency between two versions, when neither is the current version, navigate to the Course Console for that version. Example: The current version is 5.0, and you wish to set an equivalency between versions 4.0 and 3.0. You would navigate to the Course Console for version 4.0 and select the Version Equivalency link.

Modify an Online Course

When an online course requires only minor updates and has an identical file structure and manifest to the current course, you can replace the online course without creating a new version, using the Modify Content option available on the Course Console page. Changes made to a course on this page will immediately be applied to all users registered to that version of the course. If you need help determining if a change is minor or major, see the online course update scenarios in [Online Help](#).

1. From the menu, select **Admin > Catalog > Course Catalog**.
2. Search for your Training Title.
3. Locate the training on the search results page and select the **Training Title**.
4. Scroll down to the Content section, select the dropdown icon, and select **Modify Content**.
5. Use the **Select a File** button or drag and drop your zip file onto the Upload Files section.
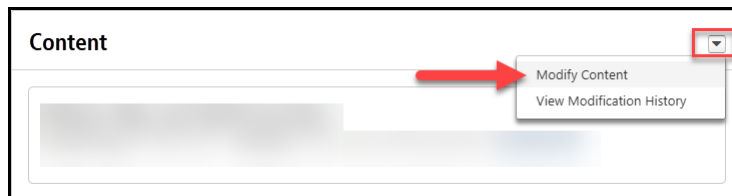
6. The file begins in Processing mode. You may stay on this page or return later by clicking the Resume button on the Course Console.
7. Select the **Refresh Status** button until the status says Draft Ready.
8. Optional: Select the **Review Modifications** button to review the modifications to the files contained within the zip file. When finished, select **Done** at the bottom of the flyout window.
9. Select the **Modify Content** button. A pop-up warning message appears. Select the **Modify Content** link to continue.
10. The file returns to Processing mode. Select the **Refresh Status** button.
11. When finished, you are returned to the Course Console page. The Content section of the page displays a green bar stating the content was modified successfully.