**Checklist for Transitioning to the New LMS**  
  
**Action Items for the Current Platform**URL: [learn.ue.org](https://learn.ue.org/PublicWelcome.aspx)

**Complete the following tasks by May 27, 2024***:*

* Download all completion data.

*Prior completion data won’t be migrated.* [*A guide to download your data can be found here.*](https://www.ue.org/499403/globalassets/online-courses/learning-launch/learner-completion-reports-guide.pdf)

* Write down your current learning path configuration (there is space to add this information at the end of this checklist).

*This information can be found under the My Training Settings section of the My Admin Panel on learn.ue.org.*

* Review your current training administrators (TAs) and determine if anyone needs to be removed or changed to a manager.

*A list of current TAs can be found under the My Training Settings section of the My Admin Panel on learn.ue.org. See the glossary at the end of this document for more information.*

* Notify your learners that the site **won’t be available from May 28 to June 1**.

*If learners are in the middle of a course, they should finish by May 27. Otherwise, they will have to restart the course on the new platform after June 1.*

**Optional Steps**

* Prepare your user list for the new platform. Generate a user list from your institution’s record-keeping platform or download your current user list from the retiring platform.

*Users are not being migrated. You can use this list to perform a bulk upload on the new platform.*

* Schedule a [new LMS consultation](https://outlook.office365.com/book/UnitedEducators2@unitededucators.onmicrosoft.com/s/EJqjpa22m0um0UDEy2duHQ2) to discuss how you’d like to set up your platform.

**Action Items for the New Platform**URL: [uelearningportal.docebosaas.com/learn](https://uelearningportal.docebosaas.com/learn)

**Get Started**

* Review the Training Admin Guides under “Need Help?” on the lefthand User Menu.
* Decide if you will need to create learning plans or groups.

*By default, all users will be able to see the full course catalogue and enroll themselves in any course.*

**Optional Steps**

* Create your user groups.
* Create your learning plans.
* Upload your users.
* Create your managers.
* Enroll your groups or users in learning plans.
* Enroll your groups or users in courses.
* Generate self-registration links (available after June 1).
* Contact [launch@ue.org](mailto:launch@ue.org) if you need anyone removed from the current TA list.

**Glossary**

* **LMS** – Learning Management Software
* **TA** – Training Administrator
* **Learning Portal** – UE’s learning site
  + Current: learn.ue.org
  + New: uelearningportal.docebosaas.com/learn

|  |  |
| --- | --- |
| **TAs** | **Managers** |
| * Can create users & run bulk uploads * Can pull reports on any user in their institution * Can generate links for learning plans or courses * Can assign courses or learning plans * Can set deadlines * Can create managers | * Can add existing users to their team * Can pull reports on their team members * Can generate links for courses * Cannot create new users * Cannot create or enroll users in learning plans |

**Record Current Learning Paths**

|  |  |
| --- | --- |
| **Learning Path Name** | **Course(s) in the Learning Path** |
| *Learning Path Name* | * *Course 1* * *Course 2* |
|  |  |
|  |  |
|  |  |

**Current TAs**

|  |  |  |
| --- | --- | --- |
| **Name** | **Email** | **Keep as TA or make a manager?** |
| *John Doe* | *johndoe@ue.org* | *Make a manager* |
|  |  |  |
|  |  |  |