



Step by Step Guide to Migrating Historical Course Records by Batch Upload to CourseMill (CM)

Step

1. Identify Historical Record Sources

- These may be derived from one or multiple historical LMS sources and “off-line” sources.
- Under ideal circumstances all will be exportable or recoverable in a CSV or other file format portable into Microsoft Excel.
- Migrating “paper” records requires a very high level of manual effort to convert to electronic form and is not addressed further.

2. Download Historical Records

- If possible, export ALL user, course and curriculum records from historical systems prior to shutting system down.
- To simplify exporting large data sets you may need to increase the query result configuration to allow export of a larger number of lines of data than the standard configuration. [For example the query result parameter in Outstart/Kenexa Learning Suite was reset to 400,000 to enable export of the user records query in two batches. The returned data set was then sorted A-Z to get the front “half” and then exported, and then resorted Z-A to get the back “half” exported, and then the two export files were “joined” together at the “overlap” match line.]
- For 3rd party hosted LMS providers, request as single files for user, course and curriculum records.

3. Evaluate Historical Records

- Using Excel, sort and filter the historical records to determine and identify the types of records you want to batch upload and the level of data preparation that will be required.
 - Courses and Curricula
 - The need if any) for Session data to be uploaded
 - Completed vs. Passing with Score
 - Users with multiple completion statuses for single course
 - True historical courses/curriculum which have been discontinued vs. continuing use of same courses/curriculum in CM
 - Historical Course/Curriculum IDs vs CM Course/Curriculum IDs
 - Historical User IDs vs. CM User IDs
 - Types of Comments you may want to batch upload into Gradebook to identify source of historical transcript record

Step

4. Build Course/Curriculum Matrix in Excel

- This serves to organize the batch upload project, provides a file to copy/paste required data directly into CM when creating the historical courses, and serves as a check-off list as you progress through the batch upload process.
- Include intended CM Course or Curriculum ID, Active Status, Course or Curriculum Name, Session ID, Description, Credit Hours, Instructors, Keywords, Gradebook Comment, Type of Certificate (if any), and other fields you expect to populate or want to configure in a specific manner.
- Spell check the document.

5. Determine Type/Nature of Certificate (If Any)

- Consider the type and nature of certificate (if any) that will run with each historical course/curriculum.
- Consider using the course/curriculum naming convention as an identifier of the historical source, and then issue a standard certificate.
- If you need a custom certificate to run with one or a series of historical courses/curricula, plan on uploading for the first course/curriculum built, and then build additional course/curriculum using the same custom certificate by duplicating and then modifying details to create like course/curricula with like certificate.
- Contact CM support for upload and configuration of custom certificates.

6. Create Historical Courses/Curriculum in CM

- CM 7.1 and prior does not have the functionality to batch upload course/curriculum, so this all is done manually. This was found to be the most time intensive part of the process, so it is important to be efficient.
- Leverage the previously built Excel course/curriculum matrix to copy/paste text-heavy fields into CM and then configure tick boxes as called for on the Excel matrix.
- This can be done by a team of people, with course “builders” and “checkers” to make certain all courses/curriculum are configured properly.
- Create each discontinued historical course/curriculum as Gradebook (No Content) and set for Enroll Only (so users cannot accidentally enroll in a discontinued course).
- Set all notifications for discontinued courses to No, unless you want completion certificates emailed, in which case set Course Is Completed to Yes.
- If you are batch uploading historical records to active courses with active enrollments in CM, temporarily disable notifications during batch upload, then reset as previous.
- Set each historical course/curriculum initially to active until batch uploads are complete. They can be maintained in active status so they appear on user’s transcripts, or made inactive following batch upload. With CM 7.1 the courses can be made inactive following completion of batch upload as users have the option of displaying inactive courses by selecting a tick box on the My Transcript tab to display inactive course on transcript.

Step

7. Make Decision on Active or Active+Inactive User Historical Record Upload

- A key decision is whether you plan to upload historical records for all users active and inactive, or only records for active users.
- This decision determines which users must be created in CM prior to the batch upload.
- If you are loading CM out-of-the-box and want to upload historical records for inactive users, batch upload the inactive user list as active, batch upload the course/curriculum records, then make the users inactive and archive them so they do not count against your seat license.
- Simplest approach is to populate records for only active users in CM (and retain Excel files of historical records for reference if future batch uploads are required).

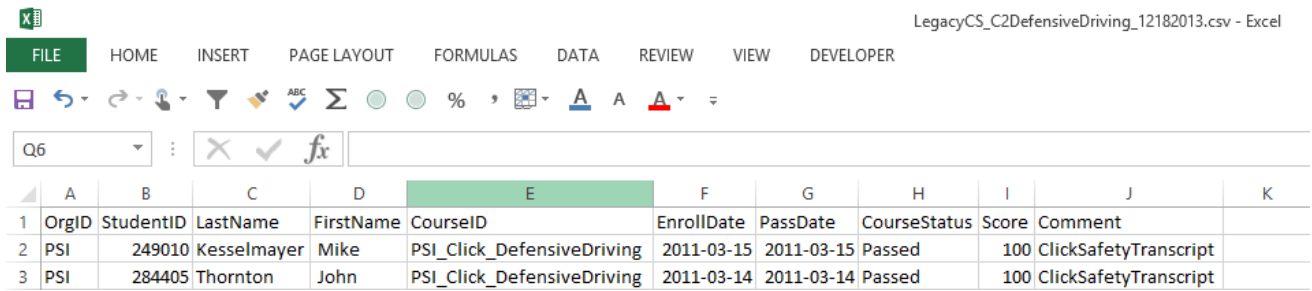
8. Create Batch Upload Files in Excel and Save as CSV

Refer also to [CM Supplemental Guide Batch Managing User Data Reference](#) particularly the section on Creation of Historical Records.

- Configuring the selected historical records and users in Excel was found to be the second most time consuming part of the process.
- This was generally done as follows:
 - Work off a copy set of Excel files so you retain an original set of files from Step 2.
 - Delete unwanted columns and rows from the data set (e.g. retain only User ID, Course/Curriculum ID, Enrollment Date, Completion Date, Score, Status).
 - Verify User IDs match the User IDs in CM for the batch upload. If not, modify to match CM.
 - Download user report from CM to include OrgID, UserID, LastName and FirstName.
 - Use Excel VLookup to read LastName and FirstName and OrgID into columns to right of UserID in historical records file.
 - Copy > Paste Special > Values to overwrite formulas.
 - Cut > Paste OrgID in Column to left of User ID.
 - Verify historical CourseID matches CourseID created in CM, if not, Copy > Paste CourseID from CM or Excel file built in Step 4.
 - Configure EnrollDate and PassDate in Excel to match CM's yyyy-mm-dd.
 - Make certain historical CourseStatus matches equivalent status acceptable in CM (refer to Gradebook for options) as some LMSs use alternate status types.
 - Enter Comment column if desired which will be retained in Gradebook.
 - Split into separate manageable record batch files by course or curriculum.
 - Save as Excel, then Save As CSV (Comma delimited) (*.csv)
 - NOTE: when reopening CSV files in Excel to correct data, verify the date fields retain yyyy-mm-dd formatting prior to re-Saving as CSV.

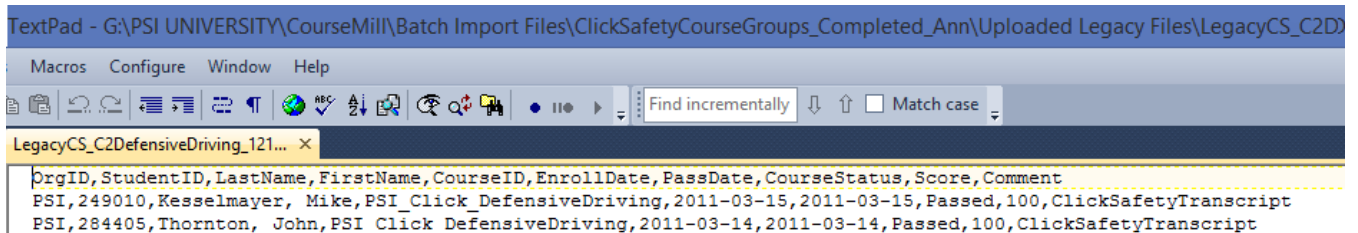
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Example Excel File Prepared for Save As CSV



	A	B	C	D	E	F	G	H	I	J	K
1	OrgID	StudentID	LastName	FirstName	CourseID	EnrollDate	PassDate	CourseStatus	Score	Comment	
2	PSI	249010	Kesselmaye	Mike	PSI_Click_DefensiveDriving	2011-03-15	2011-03-15	Passed	100	ClickSafetyTranscript	
3	PSI	284405	Thornton	John	PSI_Click_DefensiveDriving	2011-03-14	2011-03-14	Passed	100	ClickSafetyTranscript	

Example Batch Upload File Saved As CSV from Excel File



```
LegacyCS_C2DefensiveDriving_121... x
OrgID,StudentID,LastName,FirstName,CourseID,EnrollDate,PassDate,CourseStatus,Score,Comment
PSI,249010,Kesselmaye, Mike, PSI_Click_DefensiveDriving,2011-03-15,2011-03-15,Passed,100,ClickSafetyTranscript
PSI,284405,Thornton, John, PSI_Click_DefensiveDriving,2011-03-14,2011-03-14,Passed,100,ClickSafetyTranscript
```

Step

9. Upload Batch User Data

- Performing the batch file uploads was found to be the least time intensive part of the process as CM is doing most all of the work for you.
- CSV files are uploaded in CM under Manage User > Batch User Data.
- Consider starting with a test file of 2 users configured as desired to Import User Data.
- Run the Error Check Data as first step, and do this on all batch upload files.
- If errors, recheck configuration of CSV data, modify, and Save as CSV to retest.
- If no errors, run file as Process Data.
- Check “test” users transcripts in CM to verify uploaded data is configured as desired.
- Upload complete batch files (10,000 plus records can be successfully uploaded from a single file).
- Remember to reset course/curriculum notification and course/curriculum status to desired configuration upon completion of upload.

10. Retain Raw & Upload Files

- Retain the raw upload and original historical record files for reference for rehires and correcting data sets where configuration may have erred from original.

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