

In order to keep your LMS running efficiently for Administrators, there are a few tasks to complete each year such as deactivating old terms, updating your User Training Settings, adding reminder emails to new courses, and cloning your custom content for the new year. These tasks may vary based on the LMS features your organization is using. Annual maintenance should take less than 30 minutes per year.

Click on an option to jump directly to that section

- [Deactivating Terms](#)
- [Updating User Training Settings](#)
- [Adding Reminder Emails](#)
- [Updating Custom Content](#)

Deactivating Terms

We recommend deactivating expired Terms as part of your annual LMS maintenance. While Terms disappear from student view once they have expired, they remain visible in admin view until deactivated. You can still run Offline Reportings (Transcripts) on inactive Terms, but they will no longer show up as courses eligible for enrollment. If you need to access information such as Test Reviews or Course Reports for courses in deactivated Terms, change the Term status back to active. Do not deactivate terms until they have expired or are no longer in use.

Admin tab → **Courses & Communities** → **Terms**

Once entering the Terms Management page, you can filter down to view All Terms, Active Terms, or Deactivated Terms.

Click the **Edit** button to edit the Term

Terms Management				
Name	Start Date	End Date	Deadline Date	
Courses - 2024	10/01/2023	04/01/2025		
Custom Content Templates				

Admin Overview	
	Config & Settings
	User Management
	Application Management
	Courses & Communities
	» Terms
	» Courses
	» Communities
	» Import / Export
	Cloning Tools
	Reports
	Home Page Alerts
	Home Page Links

The **Sort Order** allows you to adjust the order of terms on the Courses page separate from alphabetically

You may choose to sort older terms to the bottom of the list. To do so, **delete the existing sort order number and leave the field blank**

To **deactivate** a term, simply change the **Status** to **"Inactive"**

With the release of the **2026 Model Year** courses, it's recommended that **ANY TERMS FROM 2024 OR PRIOR BE DEACTIVATED**

*Custom Identifier	Courses - 2024
*Name	Courses - 2024
Start Date	10/01/2023 12:00 am
End Date	04/01/2025 12:00 am
Grade Submission Deadline	
Sort Order	1
Status	Active
Save	

Update User Training Settings

Admin tab ➔ **User Management** ➔ **Users Training Settings**

If you are using User Training Settings with set learning paths for New Hire or Annual Training, you will need to update the course selections to the new model year.

To edit an existing learning path, click the **Edit** button for the User Training Setting. **Unselect the 2025 Courses** and **Select the 2026 Courses** you want included and click **Save**.

Type	Name	
Job Title	DSP	  
Job Title	Manager	  

This will **NOT** undo any existing enrollments but subsequent enrollments via the learning path will reflect the new selections.

This is also a great time to verify that your staff are appropriately assigned to User Training Settings such as Job Title, Cost Center, and Site for bulk enrollments

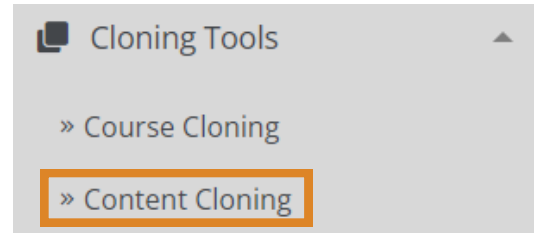
See *User Training Settings* in the **User Management & Enrollment guide** for more information

Add Reminder Emails with Content Cloning

If you're currently using **Reminder Emails (Agents)**, you'll need to add them to the new terms of courses using **Content Cloning**

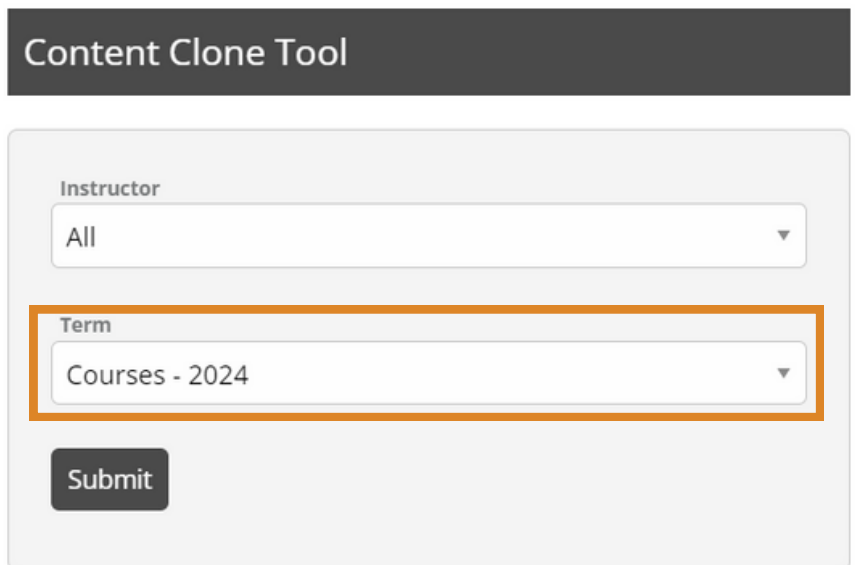
If you are not already using Reminder Emails but would like to set them up, please see *Reminder Emails (Agents)* in the **Course Management guide**

Admin tab → **Cloning Tools** → **Content Cloning**



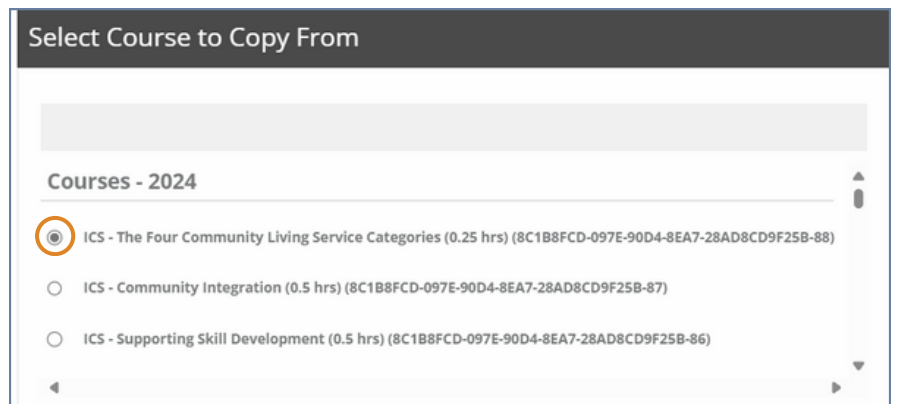
1. **Select the Term** FROM which you want to clone. Select by choosing a Term from the dropdown and then clicking **Submit**

You will select a Term containing a course with a Reminder Email to clone



A screenshot of the 'Content Clone Tool' form. The form has a dark header with the title 'Content Clone Tool'. Below the header, there are two dropdown menus. The first is labeled 'Instructor' and has 'All' selected. The second is labeled 'Term' and has 'Courses - 2024' selected. The 'Term' dropdown is highlighted with an orange rectangular border. Below the dropdowns is a 'Submit' button.

2. **Select the Course to Copy From** by selecting the radio button next to the course



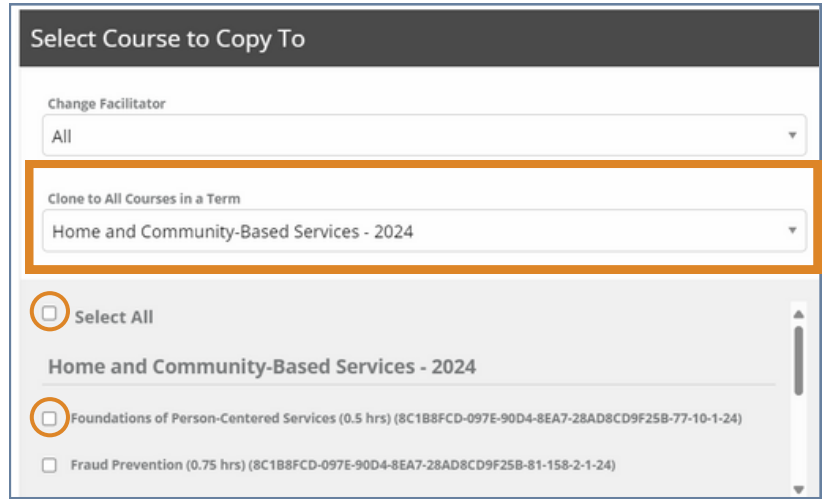
A screenshot of the 'Select Course to Copy From' form. The form has a dark header with the title 'Select Course to Copy From'. Below the header, there is a list of courses under the heading 'Courses - 2024'. The first course, 'ICS - The Four Community Living Service Categories (0.25 hrs) (8C1B8FCD-097E-90D4-8EA7-28AD8CD9F25B-88)', is selected with a radio button. The other two courses, 'ICS - Community Integration (0.5 hrs) (8C1B8FCD-097E-90D4-8EA7-28AD8CD9F25B-87)' and 'ICS - Supporting Skill Development (0.5 hrs) (8C1B8FCD-097E-90D4-8EA7-28AD8CD9F25B-86)', are not selected. The first radio button is highlighted with an orange circle.

Add Reminder Emails with Content Cloning

Admin tab → Cloning Tools → Content Cloning

3. **Select the Course to Copy To** using the checkboxes

You can choose to **Clone to All Courses in Term** and use the **Select All** option to clone to all the courses in a **2026 Term**



Select Course to Copy To

Change Facilitator
All

Clone to All Courses in a Term
Home and Community-Based Services - 2024

☒ Select All

Home and Community-Based Services - 2024

☒ Foundations of Person-Centered Services (0.5 hrs) (8C1B8FCD-097E-90D4-8EA7-28AD8CD9F25B-77-10-1-24)

☐ Fraud Prevention (0.75 hrs) (8C1B8FCD-097E-90D4-8EA7-28AD8CD9F25B-81-158-2-1-24)

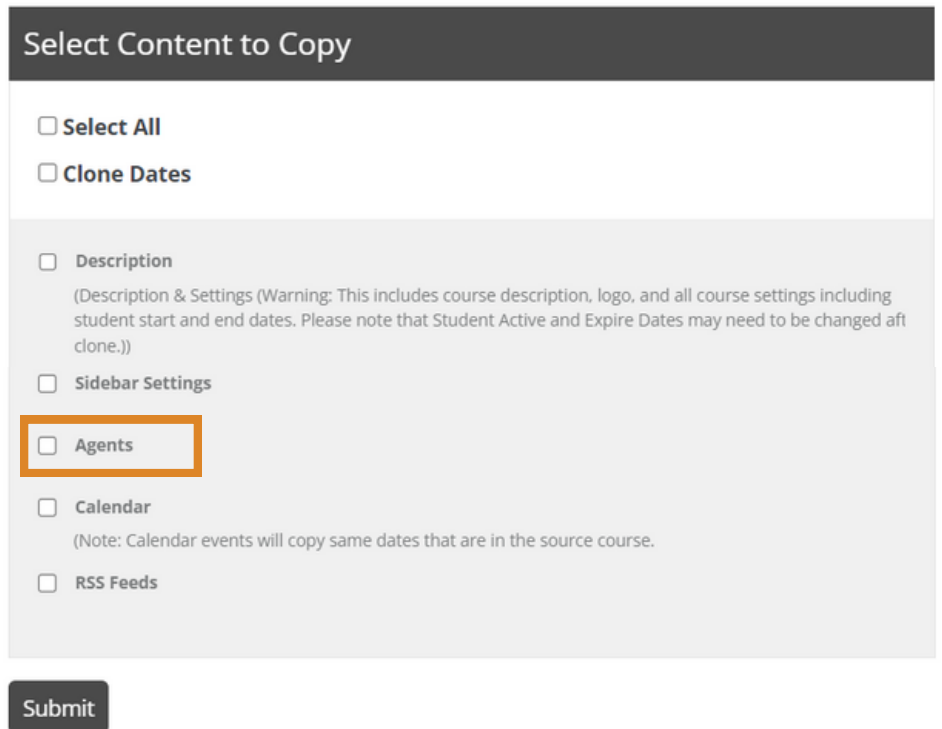
4. Select the Content to Copy

To clone Reminder Emails, select **Agents**

Note: This screenshot has been edited to show only some of the available items to copy

5. Click **Submit**. The page will refresh and you will receive a content cloned successfully message

Repeat these steps to clone to additional Terms/Courses



Select Content to Copy

☐ Select All

☐ Clone Dates

☐ Description
(Description & Settings (Warning: This includes course description, logo, and all course settings including student start and end dates. Please note that Student Active and Expire Dates may need to be changed after clone.))

☐ Sidebar Settings

☒ Agents

☐ Calendar
(Note: Calendar events will copy same dates that are in the source course.)

☐ RSS Feeds

Submit

Updating Custom Content for the New Year

As students can only be enrolled in a course once, you'll typically need to make a fresh copy of your custom content for new year, much like STAR releases Model Year courses. This process starts by creating a new Term(s) for your custom content

Adding Terms

Admin tab → **Courses & Communities** → **Terms**

To add a new Term, click the **PLUS** button

Terms Management 				
Name	Start Date	End Date	Deadline Date	
Courses - 2024	10/01/2023	04/01/2025		 
Custom Content Templates				 

Admin Overview	
	Config & Settings
	User Management
	Application Management
	Courses & Communities
	» Terms
	» Courses
	» Communities
	» Import / Export
	Cloning Tools
	Reports
	Home Page Alerts
	Home Page Links

Enter a **Custom Identifier** and **Name**. You can use the same for both as long as it's not repeated from an existing term

The **Start Date** is the date courses in a term are visible to enrolled students. The **End Date** is when they expire from student view

The **Grade Submission Deadline** is not used

The **Sort Order** allows you to adjust the order of terms on the Courses page separate from alphabetically

Click **Save** when you're done

Custom Identifier

Name

Start Date 

End Date 

Grade Submission Deadline

Sort Order

Status

Active

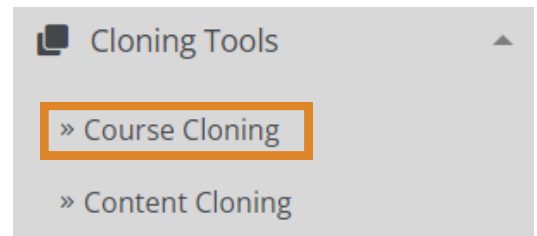
Save

Updating Custom Content for the New Year

Once the new Terms are created, you can clone your existing custom courses to the new Terms

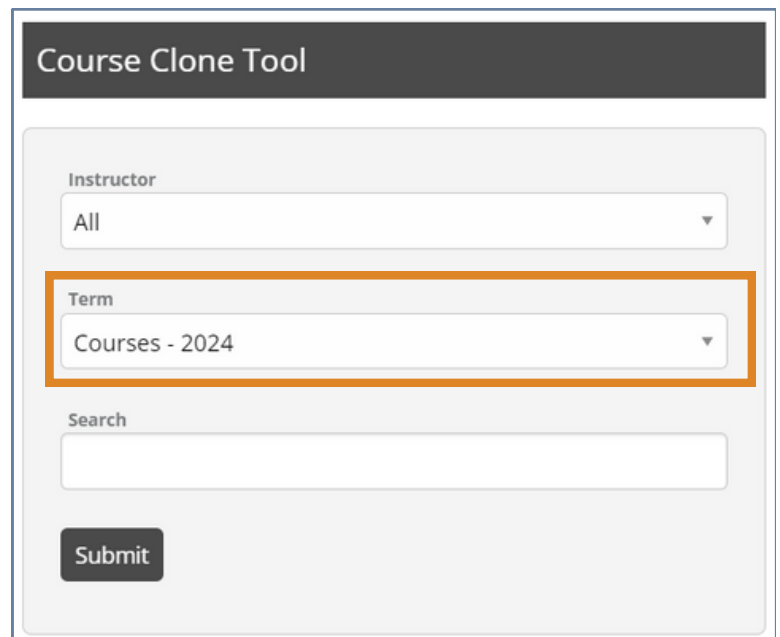
Cloning Courses

Admin tab → **Cloning Tools** → **Course Cloning**



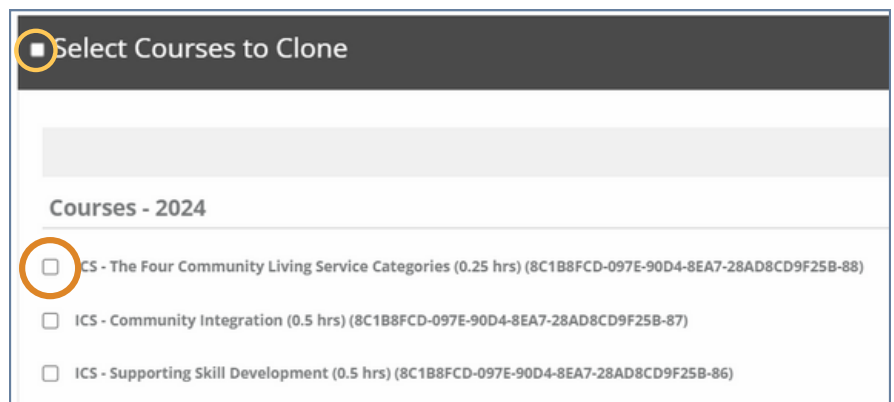
1. **Select the Term** FROM which you want to clone. Select by choosing a Term from the dropdown or using the search option and then clicking **Submit**

You will select the Term with the custom content courses you want to clone



A screenshot of a web form titled 'Course Clone Tool'. It contains three main sections: 'Instructor' with a dropdown menu set to 'All', 'Term' with a dropdown menu set to 'Courses - 2024' (highlighted with an orange box), and a 'Search' text input field. At the bottom is a 'Submit' button.

2. **Select the Course(s) to Clone** by clicking the checkbox next to the course. You can also **Select All** using the top checkbox to copy all courses from a Term



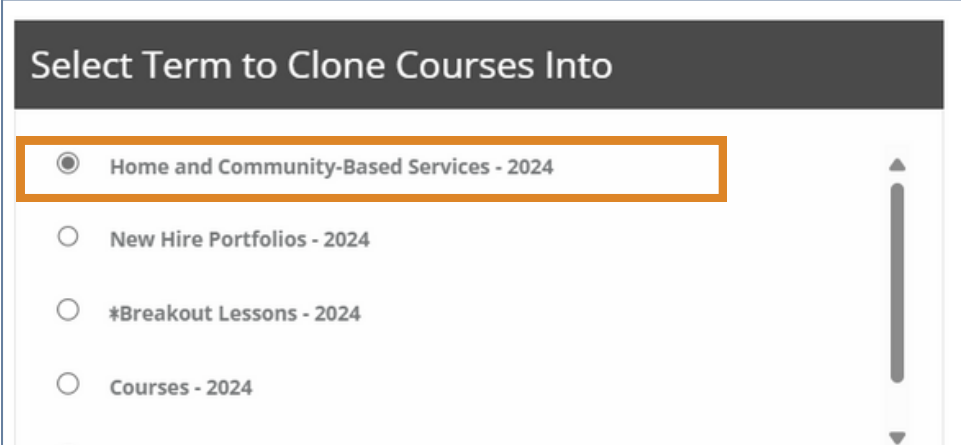
A screenshot of a web form titled 'Select Courses to Clone'. It shows a list of courses under the heading 'Courses - 2024'. The first course, 'ICS - The Four Community Living Service Categories (0.25 hrs) (8C1B8FCD-097E-90D4-8EA7-28AD8CD9F25B-88)', has its checkbox highlighted with an orange circle. Below it are two more courses: 'ICS - Community Integration (0.5 hrs) (8C1B8FCD-097E-90D4-8EA7-28AD8CD9F25B-87)' and 'ICS - Supporting Skill Development (0.5 hrs) (8C1B8FCD-097E-90D4-8EA7-28AD8CD9F25B-86)'. There is also a 'Select All' checkbox at the top of the list.

Updating Custom Content for the New Year

Cloning Courses

Admin tab → Cloning Tools → Course Cloning

3. **Select the New Term** you want to clone the new course(s) into



Select Term to Clone Courses Into

- ☒ Home and Community-Based Services - 2024
- ☐ New Hire Portfolios - 2024
- ☐ *Breakout Lessons - 2024
- ☐ Courses - 2024

4. Select the Content to Copy

You will always select the following:

- **Description**
- **Lessons**
- **Sidebar Settings**

If you have Reminder Emails set up, also select

- **Agents**

Note: This screenshot has been edited to show only the items you should select. The actual list of available content to copy is much longer

5. Click **Submit**. The page will refresh and you will receive a course cloned successfully message

IMPORTANT: Follow the instructions in *Editing Courses* in the **Course Management guide** if you need to change the title of your cloned course. If you need to update **CONTENT**, see the **Custom Content guide**

Select Content to Copy: (Optional)

- ☐ **Select All**
- ☐ **Clone Dates**

- ☒ **Description**
(Description & Settings (Warning: This includes course description, logo, and all course changed after clone.))
- ☒ **Lessons**
(Note: INCLUDED Discussions, Resources, Dropboxes, Tests, Scorm, Surveys & related)
 - ☐ Show Each
- ☒ **Sidebar Settings**
- ☐ **Agents**
- ☐ **Calendar**
(Note: Calendar events will copy same dates that are in the source course.)
- ☐ **RSS Feeds**

Submit