Inactivate or Retire a Training

It is a good practice to inactivate training when either it is an ILT Class that has ended or an online course that is no longer required. Before retiring a training here are questions to consider:

1. **Have you discussed how this change will be communicated with your customers?**

2. **Will there be a different training replacing this one?**

   If yes, review **Section 1: Email Notification** before continuing. Discuss with your team if a notice should be sent to learners listed as **Registered** and **In Progress**.

3. **Is this training is associated with a security role?** If **Yes**, **STOP** and ensure security role owner is aware of this course change and planned with UFIT to update the Access Request System.

4. **Is this training a prerequisite for another training?** Remember to modify this setting in the other training.

5. **Is this training assigned via an audience?** Contact the System Administrator for assistance.

6. **What web pages need to be updated to remove this training?**

- Section 1: Email Notification
- Section 2: Retire a Stand-Alone Course
- Section 3: Retire an ILT Course
- Section 4: Roster Management

Section 1: Email Notification

If it has been determined learners currently **Registered** or **In Progress** for the training should be notified prior to the date of retirement, follow the steps below.

1. Draft a message to learners that the training will be retired soon, and they can complete it by a prescribed date, or their registration will be cancelled for them.

2. Sample email text:

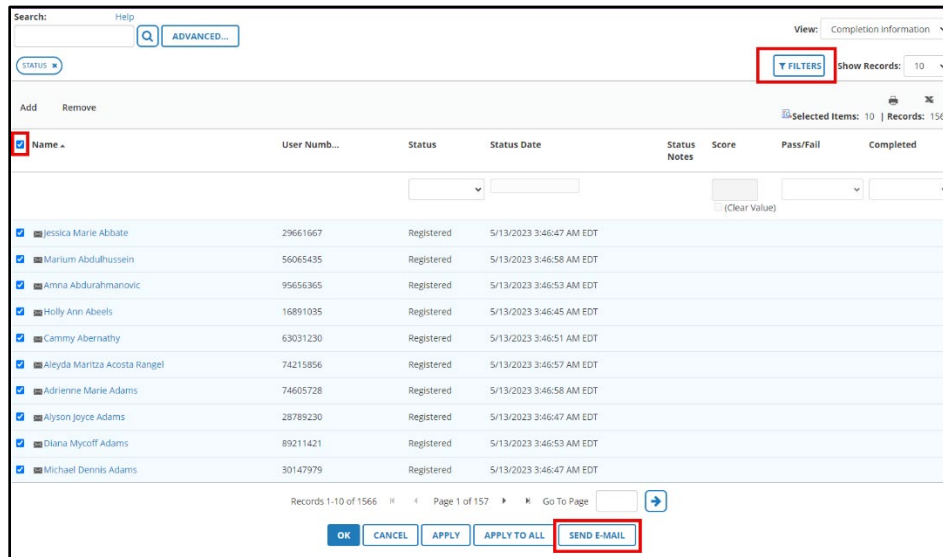   This email is for informational purposes—no action on your part is necessary.

   You are receiving this message because you are enrolled for the training course, **RSH270: Award Management**. A new version of this course will be published on Monday, 5/01/23. The new course features a more user-friendly design, but the content is the same. If you would like to complete the course, please do so by this Friday, 4/28. After Friday, you can re-enroll if you need to access the course. Thank you.

   > **NOTE:** The message can be altered to detail special instructions for taking replacement training, if there's no replacement or alternative training, or other relevant information.

3. Send notice. Navigate to **Administration > Learning Management > Activity Management > Learning Activities**.

4. Search for course and select **Manage Roster** from the **Edit** drop-down menu.

5. Click the **Show Records** drop down field and then click **100**.

6. From the Activity Roster, click on **Filters**.

7. In the Status field drop-down menu, select **Registered**.

8. Click **Apply**.

9. Select the checkbox for each learner with status of Registered then select **Send E-mail**.

10. Email:

    a. Move learner email addresses to BCC field.

    b. Provide an informative subject line.

    c. Copy and paste drafted message into body of the email.

11. After the email is sent, you are returned to the roster with Registered users selected. Repeat this process if there are additional learners listed.

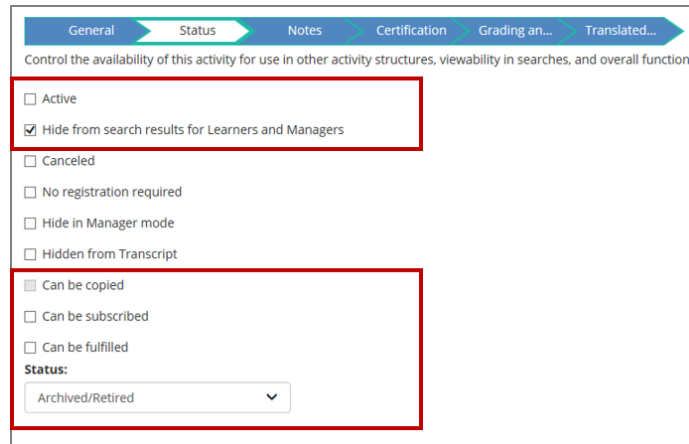12. Repeat steps 7–12 for learners with a status of **In Progress**.

Section 2: Retire a Stand-Alone Course

1. Contact the System Administrator requesting all notifications be inactivated.

2. Search for the course in the Activity Management Screen.

3. Select **EDIT**.

4. Select **Send to Stage**.

5. Select **Optional**.

6. Scroll down to **Configure general properties > Status**.

  - Select or unselect the following:

    o Uncheck – Active

    o Check – Hide from search results for Learners and Managers

    o Uncheck – Can be subscribed

    o Uncheck – Can be fulfilled

    o Change Status to Archived/Retired

7. Select **Next**.

8. In the **Instructor notes** box add details as to when training is archived. *Examples: Retired 14Feb2024 per SME. JSeitz.; Retired and replaced with GET811 02Feb2024 per SME. JSeitz*
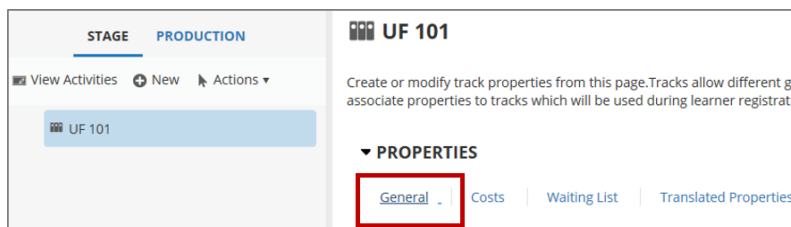
9. Select **OK**.

10. Go to **Registration > Availability**. Uncheck **Open for registration**.
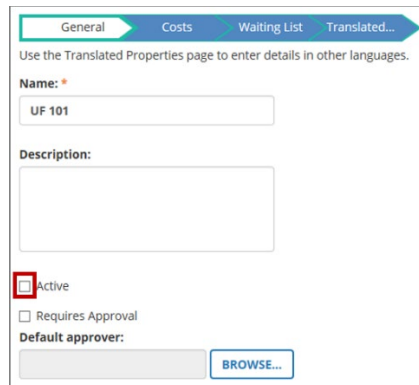
11. Select **OK**.

12. Select the **View Tracks** tab in the upper left.

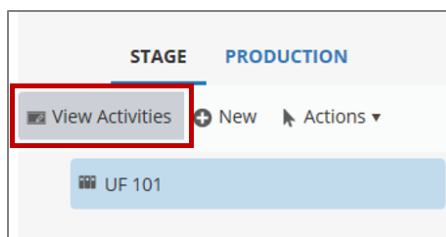13. Navigate to **Configure general properties > General**.

14. Uncheck – **Active**.

15. Select **OK**.
16. Select **View Activities**.

17. Select **Validate for Production**. When moving back into production the following Validation Result will appear and is okay to leave: *The activity has been modified to no longer be able to be fulfilled by other activities. All existing fulfillment links will be removed*.
18. Select **Move to Production**.
19. Continue to Section 4: Manage Roster.

Section 3: Retire an ILT Course

Before starting this process, consider these items:

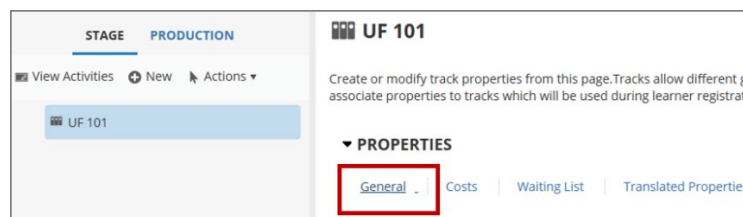- **Are there any future ILT Classes scheduled?**

  Wait until they are over before retiring.

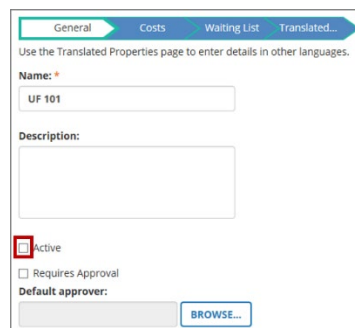- **Are past ILT Classes listed on the Activity Management Screen?**

  Check the roster to see if processed. There should be no one **Registered** nor no one on the **Wait list**. If yes, ask the System Administrator for assistance.

1. Contact the System Administrator requesting all notifications be inactivated.

2. Search for the course in the Activity Management Screen.

3. Select **EDIT**.

4. Select **Send to Stage**.

5. Select **Optional**.

6. Scroll down to **Configure general properties > Status**.
   - Select or unselect the following:
       - Uncheck – Active
       - Check – Hide from search results for Learners and Managers
       - Uncheck – Can be subscribed
       - Change Status to Archived/Retired

7. Select **Next**.

8. In the Instructor notes box add details as to when training is archived. *Examples: Retired 14Feb2024 per SME. JSeitz.; Retired and replaced with GET811 02Feb2024 per SME. JSeitz*

9. Select **OK**.

10. Go to **Registration > Availability**. Uncheck **Open for registration**.

11. Select **OK**.

12. Select the **View Tracks** tab in the upper left.

13. Navigate to **Configure general properties > General**.

14. Uncheck – **Active**

15. Select **OK**.

16. Select **View Activities**.

17. Select **Validate for Production**.

18. Select **Move to Production**.

19. Continue to Section 4: Manage Roster.

Section 4: Roster Management

On the day selected to inactivate the course, you will need to cancel all learners with a status of **Registered** or **In Progress** so they can not access the training from their Training Schedule page.

1. Navigate to **Administration > Learning Management > Activity Management > Learning Activities**.

2. Change the Active drop-down filter to **Inactive**.

3. Search for the training by title or code.

4. Select **Manage Roster** from the **Edit** drop-down menu.

5. Click the **Show Records** drop down field and then click **100**.

6. From the Activity Roster, click on **Filters**.

7. In the Status field drop-down menu, select **Registered**.

8. Click **Apply**.

9. Select the checkbox for each learner with status of Registered.

10. Click the **Status** drop down field and then click **Canceled**.

11. Scroll down and click the **Apply** button. Repeat if needed for user groups over 100.

12. Repeat steps 6 – 11 for all users with a status of **In Progress**.