Move your courses to a new platform

A step-by-step plan, timeline, test plan and go-live checklist for moving your courses and learners to a new learning platform. Written for small organisations making the switch.



Moving to a new learning platform goes smoothly when you know what will move easily and what you must rebuild. Plan the records you need to keep, test before learners arrive and tell people what is changing.

This checklist follows the order we use when we move courses for clients. A small organisation can usually make the switch in about eight weeks.

Some content moves easily and some must be rebuilt

Content in a standard file format usually moves easily. Anything built inside the old platform's own editor usually stays behind, so plan to rebuild it or keep it as a record.

Item	Usually moves?	What to do
SCORM files (a common course file format)	Yes	Upload them to the new platform and check that completions and scores report correctly.
Video files	Yes, if you have the originals	Download your original files, or find them on your computer, before the old account closes.
PDFs, slides and documents	Yes	Collect the latest version of each file in one shared folder.
Course pages built in the old editor	Usually not	Rebuild them on the new platform, or turn them into a SCORM file that can move again later.
Quizzes built in the old editor	Usually not	Export the questions if the platform allows it. Otherwise copy them into a document and rebuild them.
Learner accounts	Partly	Import names and email addresses from a spreadsheet. Learners usually set a new password.
Learner progress and completion history	Usually not	Export reports and keep them as records. Decide whether to mark past completions on the new platform by hand.
Certificates already issued	Usually not	Export a list of every certificate issued, with dates. Keep PDF copies if the platform lets you download them.
Discussion posts and comments	Usually not	Export or save the posts you must keep. Start fresh discussion areas on the new platform.
Sales pages, coupons and subscriptions	Usually not	Rebuild the pages. Plan subscription changes with your payment provider so paying learners are not charged twice.

Keep records before you close the old platform

Export completion reports, quiz results and certificate lists while you still have access. Store them in your own secure system and keep them for as long as your funders, regulator or policies require. Your old platform may delete your data soon after your plan ends, so check its terms.

Follow these steps in order

1. **List everything you have.** Record every course, file, quiz, certificate and learner group.
2. **Decide what to move, rebuild or retire.** Old courses nobody uses may not need to move.
3. **Export your records.** Download learner lists, completions, quiz results and certificates.
4. **Collect your source files.** Gather SCORM files, videos, slides and documents in one folder.
5. **Set up the new platform.** Add your branding, web address, groups, certificates and emails.
6. **Load and rebuild the courses.** Upload SCORM files and rebuild pages made in the old editor.
7. **Test everything.** Use the test plan in this guide on a phone and a laptop.
8. **Tell learners and managers.** Message them before the switch, on go-live day and a week after.
9. **Import learners and go live.** Load learner accounts, enrol them and open the new platform.
10. **Close the old platform.** Check your exports are complete before you cancel.

Tell learners what is changing

Learners worry about losing progress and certificates. Tell them early what will happen to their records and how to log in.

When	Who	What to tell them
2 weeks before	All learners and managers	The new platform's name, the switch date, what happens to their records and who to ask for help
1 week before	Learners part-way through a course	Whether they should finish now or restart on the new platform
Go-live day	All learners	Their log-in link, how to set a password and where to find their courses
1 week after	Learners who have not logged in	A friendly reminder with the log-in link and help contact

Allow about eight weeks from start to finish

Adjust this timeline to the number of courses you have and the notice period on your old plan.

When	Tasks	Done
8 weeks before	List your content, choose what to move and check the old platform's notice period	
6 weeks before	Export records, collect source files and set up the new platform	
4 weeks before	Load SCORM files and start rebuilding course pages	
2 weeks before	Test every course, send the first learner message and brief managers	
1 week before	Fix test issues, import learners and send the reminder message	
Go-live day	Open the platform, send log-in details and watch the help inbox closely	
1 week after	Answer questions, fix problems and check that reports are working	
4 weeks after	Compare completions with the old platform and ask learners for feedback	
Before the old plan ends	Confirm every export is saved, then cancel the old platform	

Our first message to learners

Include the switch date, what happens to their records and who to contact

Test every course before learners arrive

Ask someone who did not set up the platform to do these tests. Use a test learner account, and test on a phone and a laptop.

Test	Phone	Laptop
Sign up or accept an invitation, then set a password		
Log in, log out and reset the password		
Find each course from the home page		
Play every video with sound and captions		
Open every document and link		
Complete each SCORM course and check the completion shows in reports		
Pass and fail each quiz, then check the scores		
Receive the certificate by email or download, with correct details		
Receive the welcome and reminder emails		
Buy a course with a test payment, if you sell courses		
Check that a manager can see their team's report		

Go-live checklist

Records

- [ ] Learner lists, completions, quiz results and certificate lists are exported and stored safely
- [ ] We know how long we must keep these records
- [ ] Past completions that matter are recorded on the new platform or in our records

Platform

- [ ] Branding, web address and email sender name are set up
- [ ] Groups, managers and enrolment rules are in place
- [ ] Certificates show the right name, logo and dates
- [ ] Every test in the test plan has passed

People

- [ ] Learners and managers have had the two-week and one-week messages
- [ ] Our help contact is ready for extra questions in the first week
- [ ] Managers know how to find their reports

Old platform

- [ ] Links on our website and in our emails point to the new platform
- [ ] Subscriptions and payments have moved without double charging
- [ ] We have a cancellation date and a reminder to cancel

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>
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