

Integrate and Synchronize with edX

edX is a third-party content provider that hosts online learning and MOOCs (Massive Open Online Courses). If your company uses edX, you can integrate your edX courses into Learning Management so your learners can access all their training in one place. Integrated edX content is available both from the web browser and the SumTotal Mobile app.

- For more on edX, see their website (<https://www.edx.org/>).

If this is your first time integrating, see the [Understanding edX Integration](#) (on the next page) so you understand what edX objects will be imported into Learning Management. Once you do, you can [Configure and Activate edX Integration](#) (on page 397).

Understanding edX Integration

When you activate edX integration, you can set the data sync between edX and Learning Management to occur automatically and specify how often it occurs (for example, once a day). In other words, if any of the below objects change in edX, Learning Management will update to reflect those changes.

Tip: While we recommend setting a daily automatic sync schedule, you can also manually synchronize if you need to implement your changes sooner.

Integrating with edX imports all active edX online courses you have access to. This includes multiple languages. For example, if a course is available in English and Spanish and your company has licensed both languages in edX, then the integration imports both.

Inactive courses will not be imported.

edX Object	Mapped to Learning Management Object	Considerations
Online Course	Activity	By default, edX courses use the activity type "Course," but you can modify this. See Configure and Activate edX Integration (on the facing page) for instructions.

In addition, Learning Management also imports the following data for each edX course:

edX Course Data	Mapped to Learning Management Activity Property
title	Activity Name
key	Activity Code
full_description	Activity Description

edX Course Data	Mapped to Learning Management Activity Property
Type (=course)	Activity Type
enrollment_url	Launch URL
image	Image by URL
level_type: <ul style="list-style-type: none"> • Introductory • High School • Intermediate • Advanced 	Activity Filter: Expertise: <ul style="list-style-type: none"> • Beginner • Beginner • Intermediate • Expert
mobile_available	Can launch on Mobile app
results.course_runs.estimated_hours	Estimated Duration
Author Owners	Keywords These properties are not in the Staging Editor. They only affect Enterprise Search entries.

Additional Considerations:

- edX can support single sign-on (SSO), but it requires that a technical expert perform updates to both edX and SumTotal on the backend. If you need to set up SSO, talk to your SumTotal and edX support representatives.
- edX activities are not imported with associated Library topics. If you want them to be available in the Library, you need to associate them with topics manually.

Configure and Activate edX Integration

Before You Begin:

- Make sure you've licensed the edX courses you want to make available in Learning Management.
- Ensure you know your edX Client ID and Secret Key. You'll need these to configure the integration in SumTotal. If you don't have them, talk to your edX support representative.
- Make sure you have the **CanConfigureSystem > Content Integration Settings** Learning Management security permission enabled for the administrator(s) who will be configuring edX at the domain level.

- ▶ For more on managing permissions, see the *SumTotal Learning Management Security Roles Configuration Guide*.

1. Make sure you're in the domain where you want the activities to be synchronized.


Best Practice: We recommend **creating a single, unique domain** for your integration and only synchronizing in that one domain. This way, if there are any implementation issues and you need to start over, it won't affect other activities or domain properties.

Once the sync is complete, you can then use audiences to manage who can see the activities. This will also prevent there from being duplicate activities across domains. See [Working with Audiences](#) (on page 239) for instructions.

Important: Do **not** move the activities to a different domain after synchronizing. This will break the sync and the integrated content will stop updating automatically. You should keep the activities in the domain where you set up the integration.

2. From the **Content Integrations** page, find **edX** and click **Edit**.

Enter the default learning activity properties below. Learn will only apply these properties to learning activities synchronized in the future. Content is synchronized daily.



Status

Activate

Client Id *

Secret Key *

TEST

Unique User Identifier

Person Id ▼

3. Select **Activate** to enable edX integration.

Enabling allows you to integrate Learning Management and edX. Disabling prevents future syncs, but any previously added courses will remain as activities in Learning Management.

Note: Once activated and synced, any changes to the following configurations only affect courses that are added after the next sync

4. Enter your edX credentials. edX will provide you with the information you need to enter in the following fields:
 - ▶ Client ID
 - ▶ Secret Key

If you're not sure what to enter, talk to your edX representative.

5. Click **Test** to make sure your connection works.
6. Select "Person Number" as the **Unique User Identifier** (UUID). This is how edX and Learning Management recognize individual users.

Important: There are other values in this drop-down, but as of the 19.2 release, they are not supported. You must select Person Number.

When a learner launches an edX course in Learning Management, edX checks the user's UUID. If the user does not exist in edX with the identifying value, then edX automatically creates a new user.

The screenshot shows a configuration panel with the following elements:

- Default Audience:** A dropdown menu currently showing "Global Audience" and a blue "BROWSE" button to its right.
- Prefix to Learning Activity Code:** An empty text input field.
- Suffix to Learning Activity Code:** An empty text input field.
- Settings:** A section containing two checked checkboxes:
 - Automatically move activities to production
 - Do not require registration for activities

7. Set the domain's **Default Audience** by clicking **Browse** and choosing from the available list. All users in this audience will be able to view and access edX activities. If you don't select an audience, Learning Management uses your current domain's default audience.
8. Set prefixes and/or suffixes for the **Learning Activity Code**.

Note: If needed, you can update or customize the audience for individual activities from the activity's) Staging Editor after the sync has completed.

Considerations for Adding Prefixes and/or Suffixes:

- ▶ We recommend adding the content provider's name (for example, edX) to the activity **code** so administrators can quickly see which activities in your system have been imported from edX. Prefixes and suffixes make it easier to pull a usage report (by using the filter "activity code begins with" or "activity code ends with").
- ▶ Any spaces added before or after these will be truncated. For example, if you add " - edX" it will appear as "ActivityCode- edX" rather than the expected "ActivityCode - edX."

Important: Future edits to these fields will only affect edX courses added through future syncs. Take care when choosing your prefixes and suffixes, as future edits to these fields can cause inconsistencies.

9. Select **Automatically Move Activities to Production** to make all synchronized edX activities immediately available to your learners. Clear this checkbox to move synchronized activities into staging instead. Keep in mind that you'll have to manually move them into production when you want them to be available to learners.
10. **Do not require registrations for activities** is automatically selected so learners can launch the activity without registering for it. We do not recommend changing this setting, but if you wish to require registration, you can clear this checkbox.
11. Map edX courses to an available **Activity Type**. "Course" is the default.
You can either assign edX courses to an existing Learning Management activity type to seamlessly integrate them with your Learning Management activities, or you can create a new activity type specifically for edX to help learners and managers search for and track those courses separately.

Tip: We recommend creating a **new** activity type for edX courses. This will help with both search filtering and reporting. For example, you could create the activity type "edX Courses," and then map it to the "Courses" asset bin shown above.

- ▶ For details on creating activity types, see the SumTotal Learning Management System Administrator Guide.

12. Configure the **Schedule Settings**.

SCHEDULE SETTINGS

Manual
 Automated

Time Zone

(UTC+00:00:00) GMT [Atlantic/Reykjavik] ▼

Schedule Type *

One Time ▼

Start Date *

📅

Start Time (Hour) *

0 ▼

Start Time (Minutes) *

0 ▼

- a) Decide if you want the sync to be **Manual** or **Automatic**. If you select **Manual**, remember to periodically sync content so your system is up-to-date.
- b) If you select **Automatic**, set your sync schedule:
 - **Schedule Type:** You can sync One Time, Daily, Weekly, or Monthly. We recommend a daily sync.
 - (One Time only) **Start Date:** Enter when you want the one-time sync to occur.
 - **Time Zone:** Select the time zone to use for the scheduled sync. This affects the **Start Time** you choose in a later field.
 - (Weekly only) **Schedule Days:** Choose the day when the weekly sync occurs (for example, Saturday).
 - (Monthly only) **Schedule Month Day:** Pick the day of the month when the sync occurs (for example, 1).

Note: If you had selected **Monthly** and you choose 32 for the day of the month, the import will always run on the last day of the month. If you select 31, the import will only run at the end of months that have 31 days.

- **Start Time (Hour) and Start Time (Minutes):** Schedule exactly when the sync occurs. This is based on the **Time Zone** you chose earlier.

For example, you could have your sync run once a day at 12:00 AM EST.

13. Click **Save**.

After integrating with edX, you may want to:

- **Manage your edX courses:** Once you've synchronized edX with Learning Management, you can manage your imported online courses from the **Activity Management** page the

same way you would an activity created within Learning Management itself. For more on managing activities, see **Working with edX activities** (below).

- **Create an edX-specific Library topic:** While there is currently no way to synchronize edX subjects and topics in Learning Management, you can still create an edX-specific Library topic (such as "edX Courses") and manually associate edX courses to that topic so they all appear in the same place within the Library. For more on associating topics to activities, see the *SumTotal Learning Management System Administrator Guide*.

Working with edX activities

Keep the following in mind when working with edX activities:

- **Activity Properties:** You can edit edX courses from **Activity Management**, with a few exceptions.
 - ▶ The following properties are imported from edX:
 - **Name**
 - **Code**
 - **Image**
 - **Description**
 - **Start Date**
 - **Estimated Duration**
 - **Can launch on Mobile app**
 - **Activity Filters: Expertise**
 - The Learning Management properties always update to match the edX properties during the next sync. As such, we don't recommend editing these properties in Learning Management.
 - ▶ The **Activity Type** and **Domain** are determined during the import process. They are not editable.
 - ▶ The activity's default **Owner** is your default system administrator. You can update this if needed.
 - ▶ The **Launch method** is Generic Document. This is not editable.
- **Library Topics:** Since it's not currently possible to import edX subjects, imported courses won't automatically display in the Library. You may want to manually associate courses with a topic so they all appear in the same place within the Library.
- **Mobile Access:** If your company uses Mobile, your learners can access edX courses from the Mobile app:

- ▶ When you import edX content, the Staging Editor's **Can launch on Mobile app** checkbox is automatically selected for every edX course that is Mobile-compatible. If you update this checkbox, it gets selected again during the next full sync.
- ▶ Imported edX content is not available offline (in other words, users can't download it).
- ▶ Learners can find content in Mobile Search. When learners launch the activity in Mobile, they're redirected to the course via the edX app. If they haven't downloaded the app yet, the course gets launched in the mobile browser.
- ▶ Learning Management tracks completions for edX content in Mobile the same way it tracks them from the browser. Keep reading for more on tracking and completions.
- **Launching and Tracking Completions:**
 - ▶ Learners can register for and launch edX activities the same way they do other activities. edX doesn't support the chromeless player, so activities launch in a new browser window. It may take a few seconds for Learning Management to connect to edX and load the course.
 - ▶ Whenever a learner launches an edX activity, Learning Management and edX share the following user data:
 - The **User Unique Identifier** (such as Person Number) as selected during the configuration
 - Full name
 - Email
 - Country code (ISO two-character)edX asks the user for permission to share this data. They must consent before they can launch the edX course.
 - ▶ Learning Management does not currently track edX courses within Learning Management. Progress and completions are only tracked in edX. We are working to change this as soon as possible.