



# **Migration to SoftChalk™ Cloud Guide**

Updated February 28, 2018

---

---

## Contents

<b>Introduction</b>	<b>3</b>
Advantages to Using SoftChalk Cloud .....	3
Guides and Resources .....	4
<b>Purchase a SoftChalk Cloud Account(s) or an Enterprise SoftChalk Cloud</b>	<b>4</b>
<b>Create a SoftChalk Cloud Account</b>	<b>5</b>
<b>Trial SoftChalk Cloud Users – Subscribe</b>	<b>6</b>
<b>Save Your Lessons to SoftChalk Cloud</b>	<b>7</b>
Create 10, Create 9 and Create 8 - Save Your Lesson to SoftChalk Cloud.....	7
SoftChalk 7 and SoftChalk 6 - Save Your Lesson to SoftChalk Cloud .....	11
<b>Save Your Activities and Quiz Groups to SoftChalk Cloud</b>	<b>16</b>
Option 1 – Save the Lesson to the Cloud and Then Save the Item to the Cloud.....	16
Option 2 – Save Library Items to the Cloud.....	18
<b>Create and Modify Your Content in SoftChalk Cloud</b>	<b>20</b>
<b>Privacy Options</b>	<b>20</b>
<b>More Information on SoftChalk Cloud</b>	<b>21</b>
<b>Help</b>	<b>21</b>
<b>Copyright Information</b>	<b>21</b>

---

## Introduction

Please note the URL below for this guide. As we update this guide, this URL will remain the same.

<https://softchalk.atlassian.net/wiki/download/attachments/129406657/cloudmigration.pdf?api=v2>

This guide is for **desktop** SoftChalk users who want to migrate their content to their SoftChalk Cloud accounts. If you are brand new to SoftChalk Cloud (and do not have the desktop version of SoftChalk) or if you would like more details about SoftChalk Cloud, please see our [SoftChalk Cloud Guide](#) and [SoftChalk Cloud Quick Start Guide](#).

---

## Advantages to Using SoftChalk Cloud

You will see many advantages to using SoftChalk Cloud:

- You can launch SoftChalk Create from within your Cloud account wherever you log in.
- Your content is available wherever you have internet access because you can save your content to your SoftChalk Cloud account. (You have the option to save your content to your local computer as well.)
- You can always update your lesson once in the Cloud but also link to the lesson in many places such as multiple courses within your Learning Management System (LMS).
- With many LMS's, you can copy and paste the LTI hyperlink for your lesson into your LMS and your students' scores will go directly into your LMS gradebook. (For more details, view your [learning management system guide](#) on our support site.)
- You can share and collaborate with other instructors on lessons.

The following pages give details for saving your content into SoftChalk Cloud from your SoftChalk desktop version. Again, this guide is for users who have a desktop version of SoftChalk and want to migrate their content to their SoftChalk Cloud account.

**IMPORTANT:** Once you finish saving your content to the Cloud, be sure to install SoftChalk Create from the Cloud - see the [SoftChalk Cloud Quick Start Guide](#) for instructions. Once you have installed Create successfully (it will look like the icon below), then uninstall your old desktop version of Create.



---

## Guides and Resources

For more details on using your SoftChalk Cloud account and creating content, please see the:

- [SoftChalk Cloud Guide](#)
- [SoftChalk Cloud Quick Start Guide](#)
- [SoftChalk Create Guide](#)
- [Video Tutorials](#)
- [Introductory Webinars for the Cloud](#)

---

## Purchase a SoftChalk Cloud Account(s) or an Enterprise SoftChalk Cloud

If you want to purchase a SoftChalk Cloud account(s) with a volume discount or if you want to purchase with a purchase order, please contact [sales@softchalk.com](mailto:sales@softchalk.com). Your institution can even purchase an [Enterprise SoftChalk Cloud](#). If you have a credit card, you can purchase online – see the section [Create a SoftChalk Cloud Account](#).

Please see the next section [Create a SoftChalk Cloud Account](#).

---

## Create a SoftChalk Cloud Account

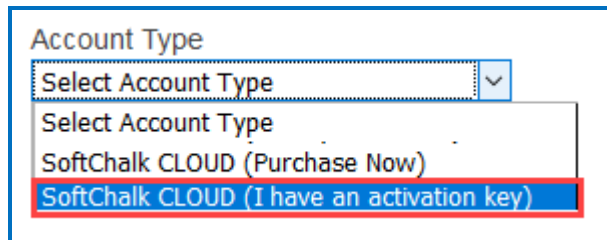
1. Go to the [SoftChalk Cloud](https://softchalkcloud.com) website (<https://softchalkcloud.com>).

**IMPORTANT:** If you already have a 30-day trial account and you now have an activation key from your institution, you do NOT need to create a new account. See the section [Trial SoftChalk Cloud Users - Subscribe](#).

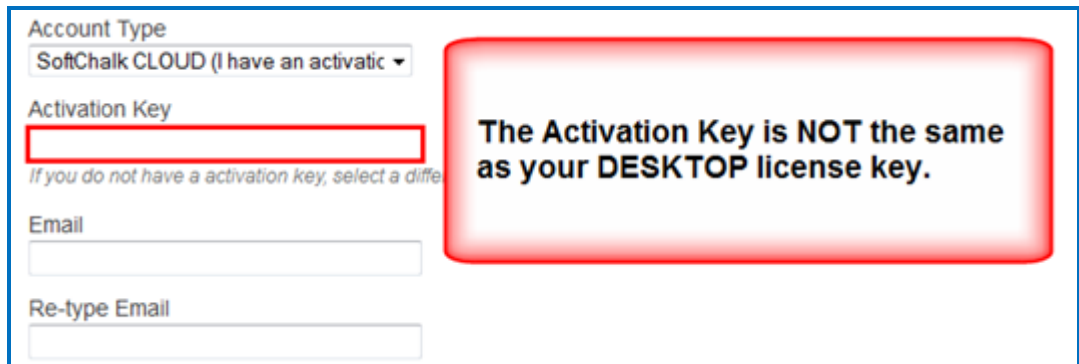
2. At the top right, click **Join Now** (see below).



3. If you are creating a "Free Trial" account, please complete the [online request form](#). You will receive an activation key via email.
4. If you are creating a licensed account, you will receive an activation key from SoftChalk, or from your school/institution liaison.
5. On the Join Now page, for the **Account Type**, click on the drop down menu and choose **SoftChalk CLOUD (I have an activation key)** and paste in the key provided to you by SoftChalk or by your institution.



**IMPORTANT:** The activation key is NOT the same as the desktop SoftChalk license key.

A screenshot of the account creation form. The 'Account Type' dropdown is set to 'SoftChalk CLOUD (I have an activatic)'. Below it is an 'Activation Key' input field with a red rectangular highlight. To the right of the form is a red callout box with a white background and a red border, containing the text: 'The Activation Key is NOT the same as your DESKTOP license key.' Below the activation key field, there is a note: 'If you do not have a activation key, select a diffe'. At the bottom of the form, there are 'Email' and 'Re-type Email' input fields.

6. Fill in the rest of your profile, select the two checkboxes at the bottom and click **Join**.

---

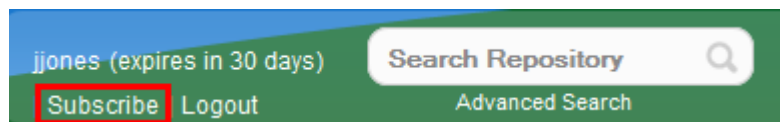
## Trial SoftChalk Cloud Users – Subscribe

If you have a trial SoftChalk Cloud account (or if you had a CONNECT free account awhile back), you do not need to create a new account in SoftChalk Cloud. Instead, you can use your same account (i.e. same username) and **Subscribe**. See the steps below.

(If you are brand new to SoftChalk Cloud, see the previous section [Create a SoftChalk Cloud Account](#).)

1. Log into your SoftChalk Cloud trial account (go to the [SoftChalk Cloud](#) website and click **Login** in the upper right corner).
2. Once you are logged in, at the top right corner of your screen, click the **Subscribe** link (see below).

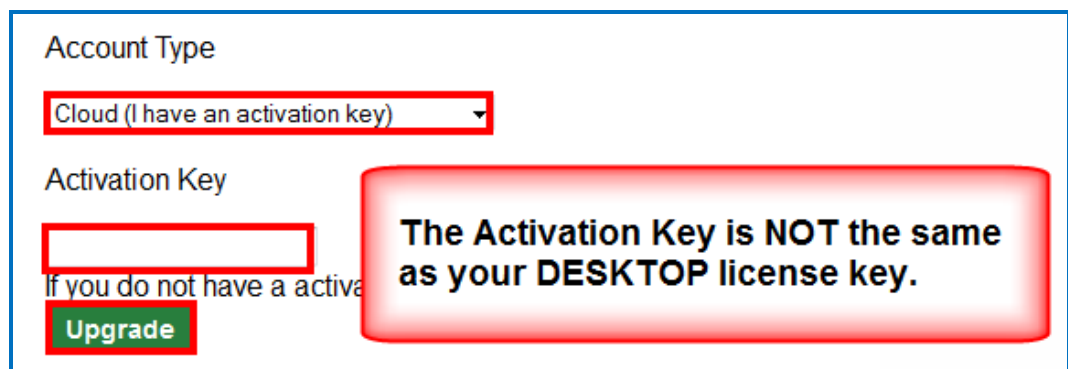
If you are logged in and you do NOT see the **Subscribe** link (see below), then you have already entered your activation key for your account.



3. If you have an activation key from your institution, select **Cloud (I have an activation key)**. After pasting your activation key, click **Upgrade** (see below).

**IMPORTANT:** The activation key is NOT the same as the desktop SoftChalk license key.

If your institution has not purchased Cloud accounts, you can select SoftChalk CLOUD (Purchase Now).

A screenshot of the account upgrade form. The 'Account Type' dropdown menu is set to 'Cloud (I have an activation key)'. Below it is an empty 'Activation Key' input field. A red-bordered box contains the text: 'The Activation Key is NOT the same as your DESKTOP license key.' Below the input field is a green 'Upgrade' button. The text 'If you do not have a activa' is partially visible below the input field.

---

## Save Your Lessons to SoftChalk Cloud

The method for setting up your SoftChalk Cloud account varies slightly from SoftChalk Create to SoftChalk 7 and SoftChalk 6.

**IMPORTANT:** As mentioned previously, once you finish saving your content to the Cloud, be sure to install SoftChalk Create from the Cloud - see the [SoftChalk Cloud Quick Start Guide](#) for instructions. Once you have installed Create successfully, then uninstall your old desktop version of Create.

If you have SoftChalk Create (i.e. Create 10, Create 9 or Create 8), please see the section below [Create 10, Create 9 and Create 8 – Save Your Lesson to SoftChalk Cloud](#).

If you have SoftChalk 7 or SoftChalk 6, please see the section [SoftChalk 7 and SoftChalk 6 – Save Your Lesson to SoftChalk Cloud](#).

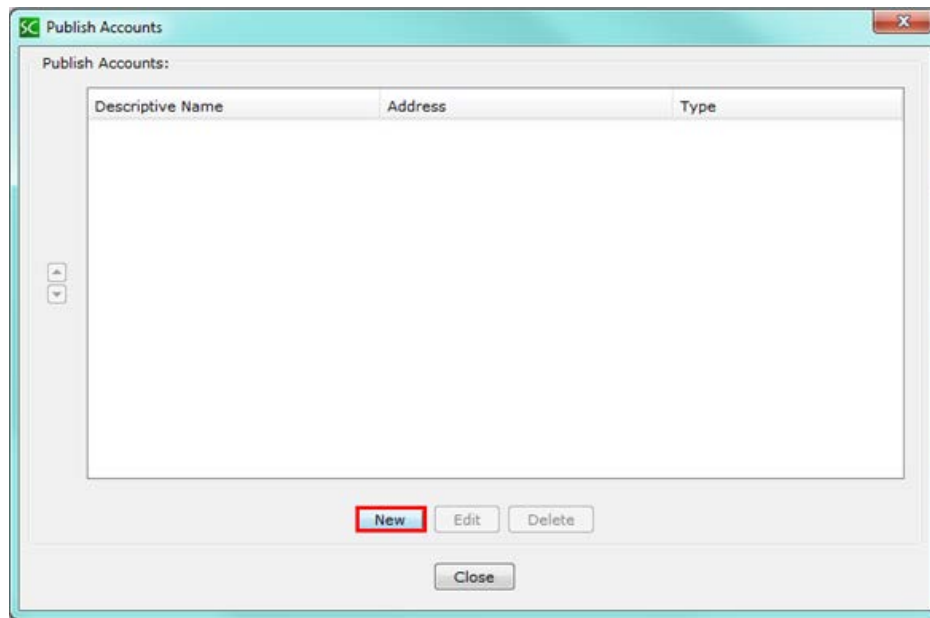
---

## Create 10, Create 9 and Create 8 - Save Your Lesson to SoftChalk Cloud

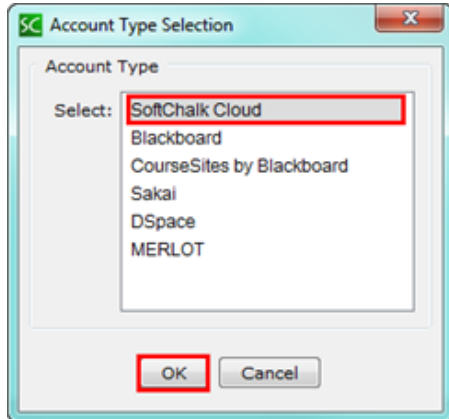
1. Start your desktop version of SoftChalk by double-clicking on the SoftChalk Create icon on your desktop (see below).



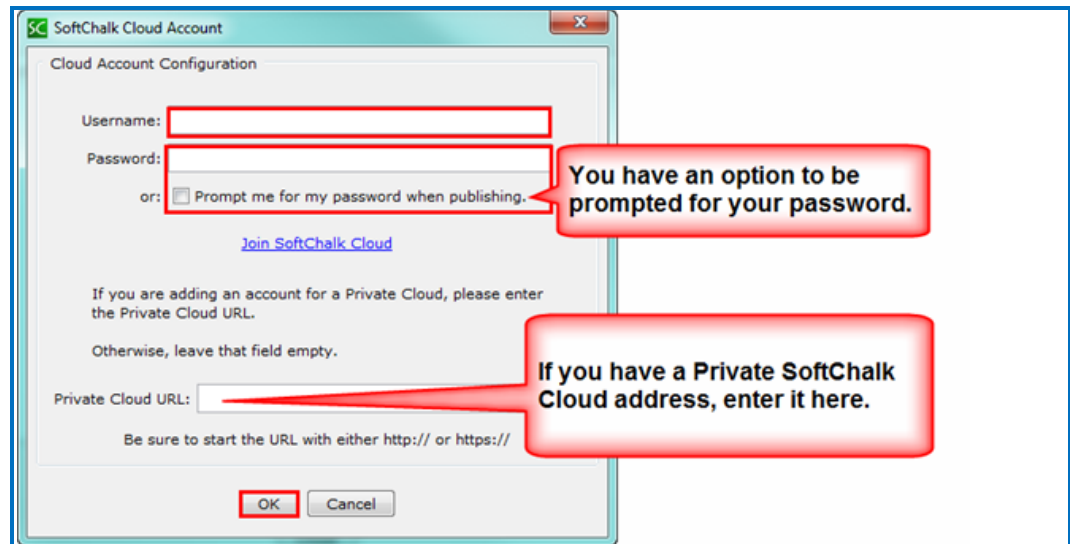
2. Next set up your account information. Choose **File/Manage Publish Accounts**. Click **New** (see below).



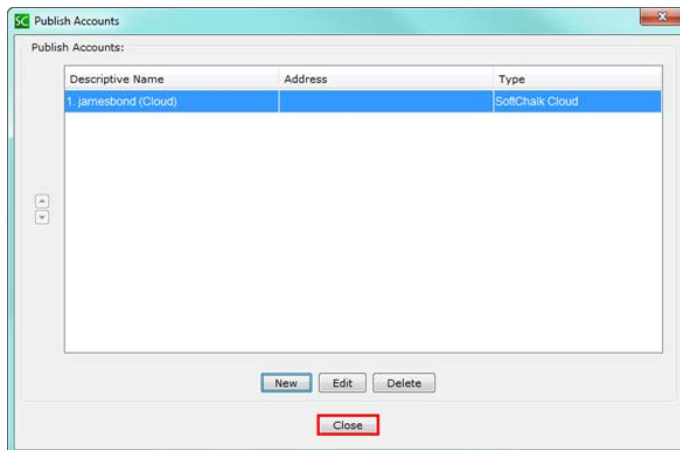
3. Choose **SoftChalk Cloud** and click **OK** (see below).



4. Enter your username and password (or click the checkbox to be prompted for your password). If your institution has an Enterprise SoftChalk Cloud, then enter the URL for your enterprise cloud (see below).

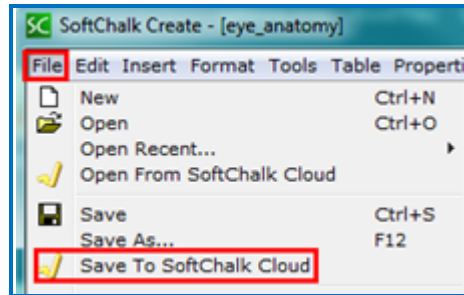


5. Click **Close** at the next screen (see below).

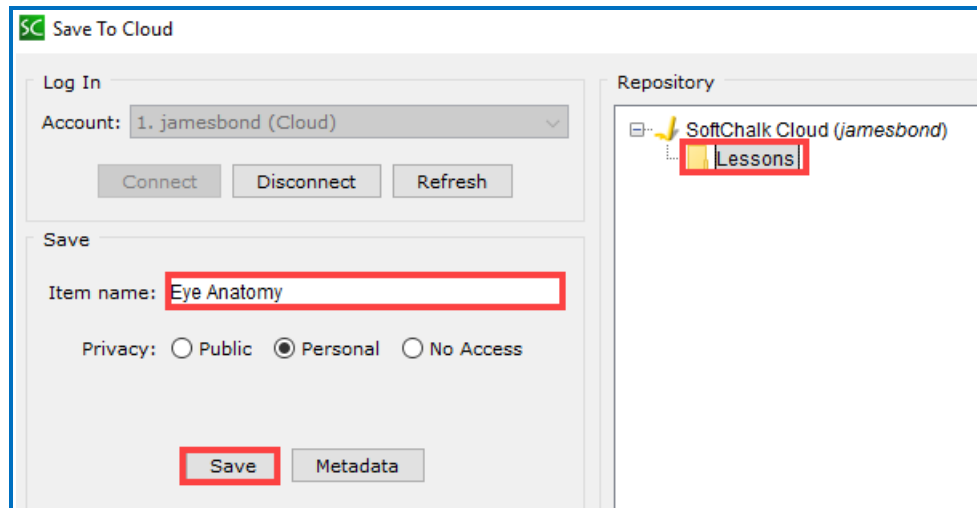




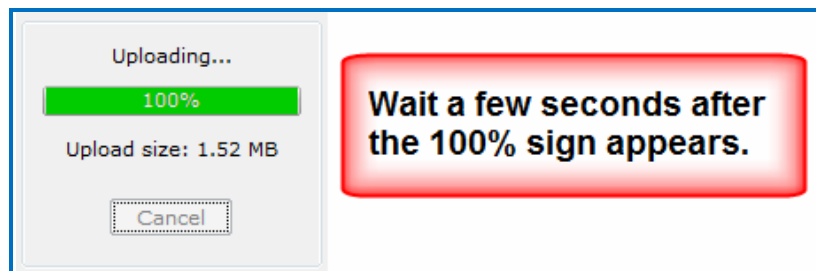
- Open a SoftChalk lesson that you want to save to your SoftChalk Cloud account. (Within SoftChalk Create, choose **File/Open**. Locate your lesson folder and double-click on it. Double-click on any .html file to open your lesson.)
- Choose **File/Save to SoftChalk Cloud** (see below).



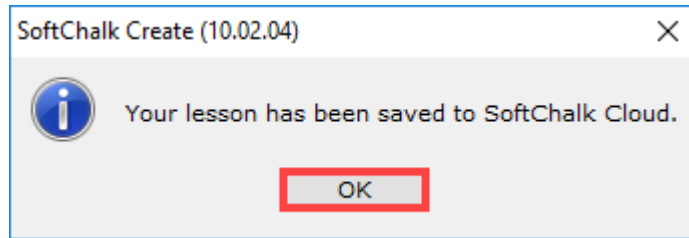
- Select a privacy option. (For details, see the section [Privacy Options](#). If you choose **Public**, you will need to enter **Metadata**. For details on Metadata, see the **Metadata** section in the [SoftChalk Create Guide](#).)
- Click **Save** (see below). If the **Save** button happens to be disabled, be sure to select a folder at the right where you can save your content.



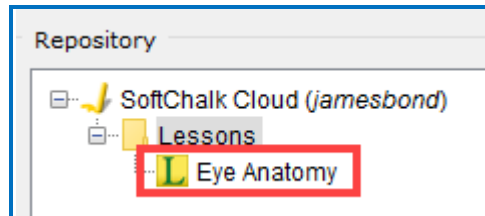
- You may need to wait a few seconds after the 100% screen appears (see below).



11. Click **OK** at the save confirmation screen (see below).



12. At the right you should see your saved lesson (see below). Click **Close** to return to your main editing window.



13. For details on editing and replacing your lesson, please see the section [Create and Modify Your Content in SoftChalk Cloud](#).

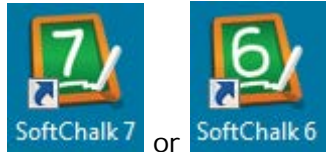
**IMPORTANT:** As mentioned previously, once you finish saving your content to the Cloud, be sure to install SoftChalk Create from the Cloud - see the [SoftChalk Cloud Quick Start Guide](#) for instructions.

Once you have installed Create successfully, then uninstall your old desktop version of Create.

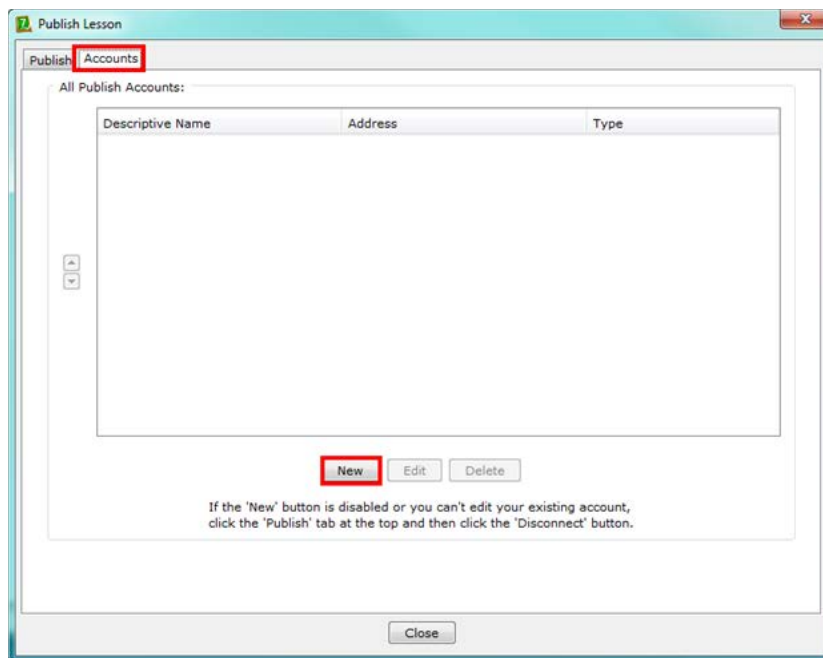
---

## SoftChalk 7 and SoftChalk 6 - Save Your Lesson to SoftChalk Cloud

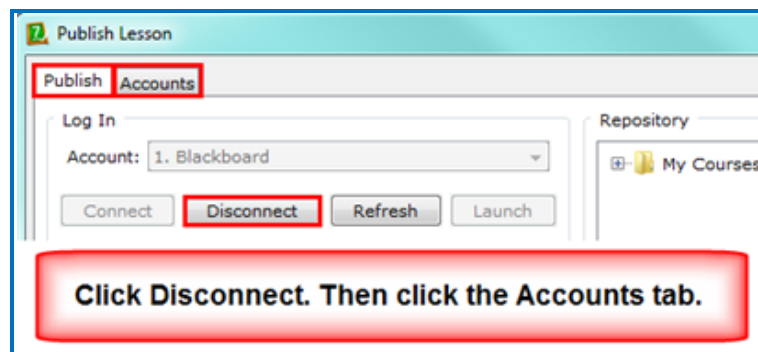
1. Start your desktop version of SoftChalk by double-clicking on the SoftChalk 7 or SoftChalk 6 icon on your desktop (see below).



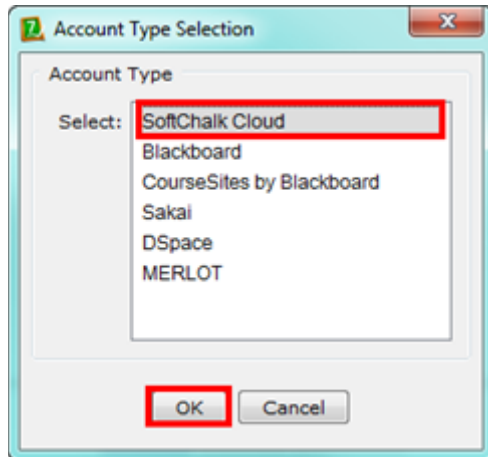
2. If you are publishing a lesson for the first time (**File / Publish Lesson**), the **Accounts** tab will appear. Click **New** (see below). (In SoftChalk 6, this tab is called the **Servers** tab.)



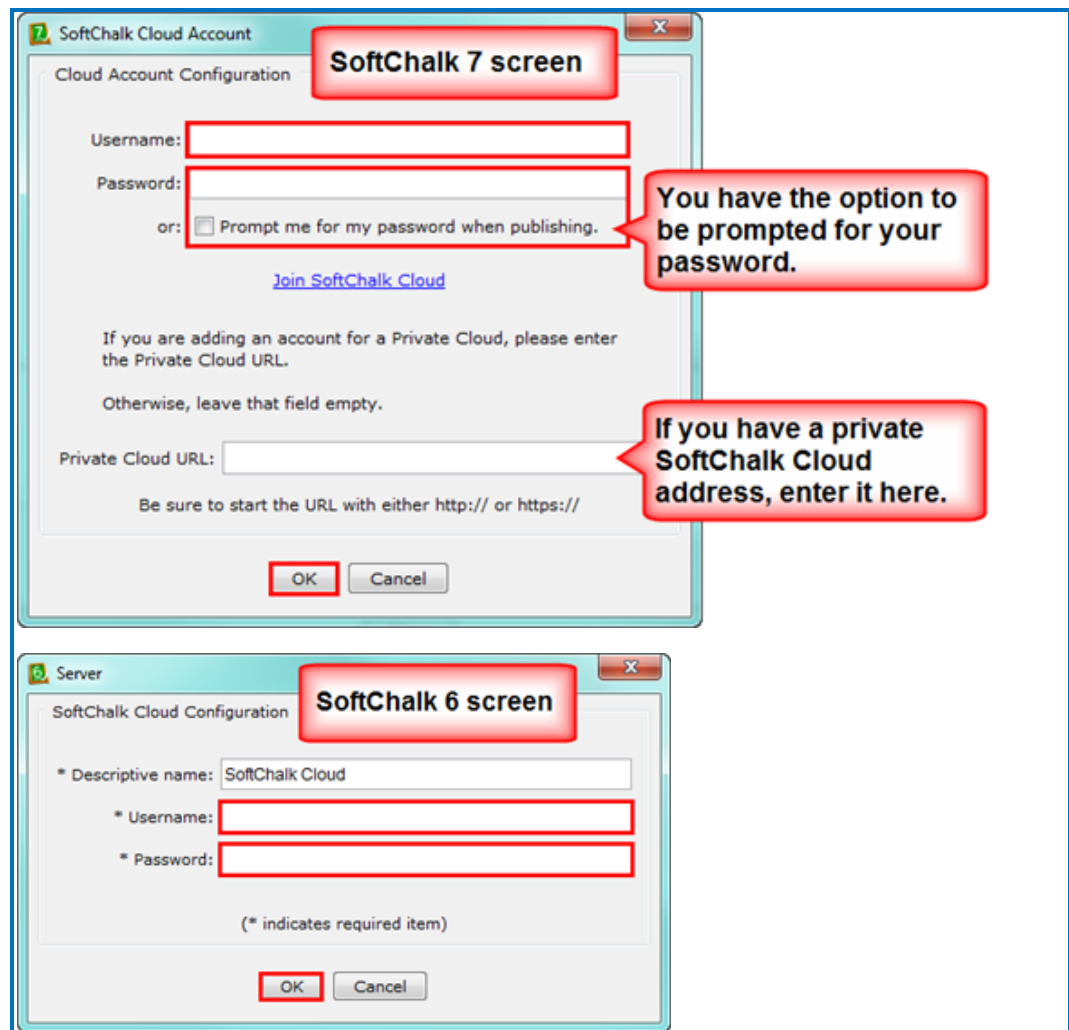
If you have published a lesson previously, for instance to a learning management system, the **Publish** tab may appear. If you are on the **Publish** tab, click **Disconnect** (see below). Then click the **Accounts** tab. (In SoftChalk 6, this tab is called the **Servers** tab.)



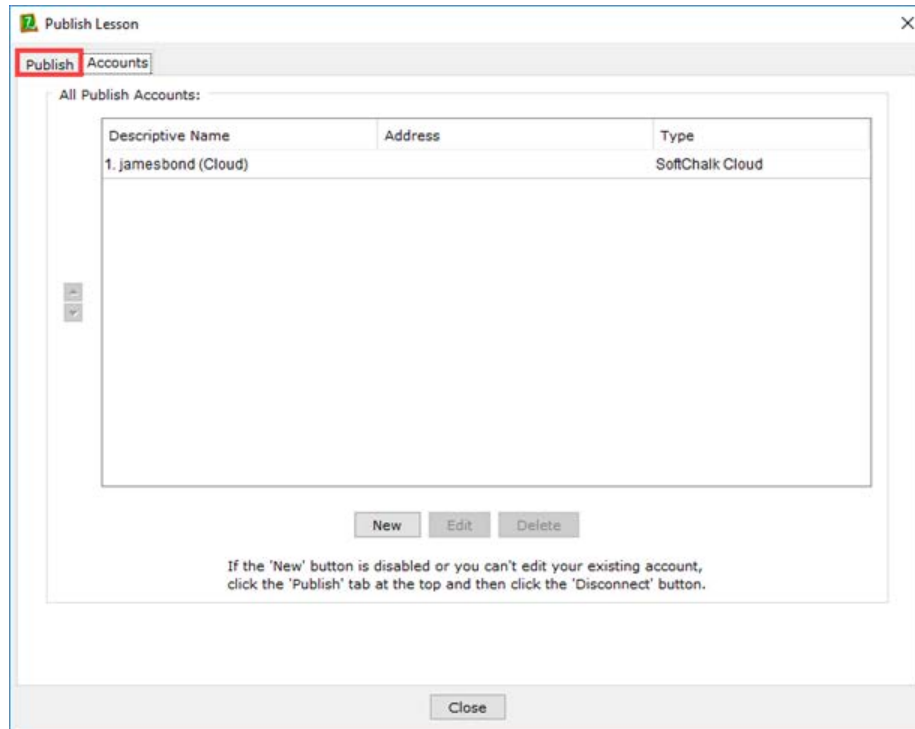
3. Make sure **SoftChalk Cloud** is selected and click **OK** (see below).



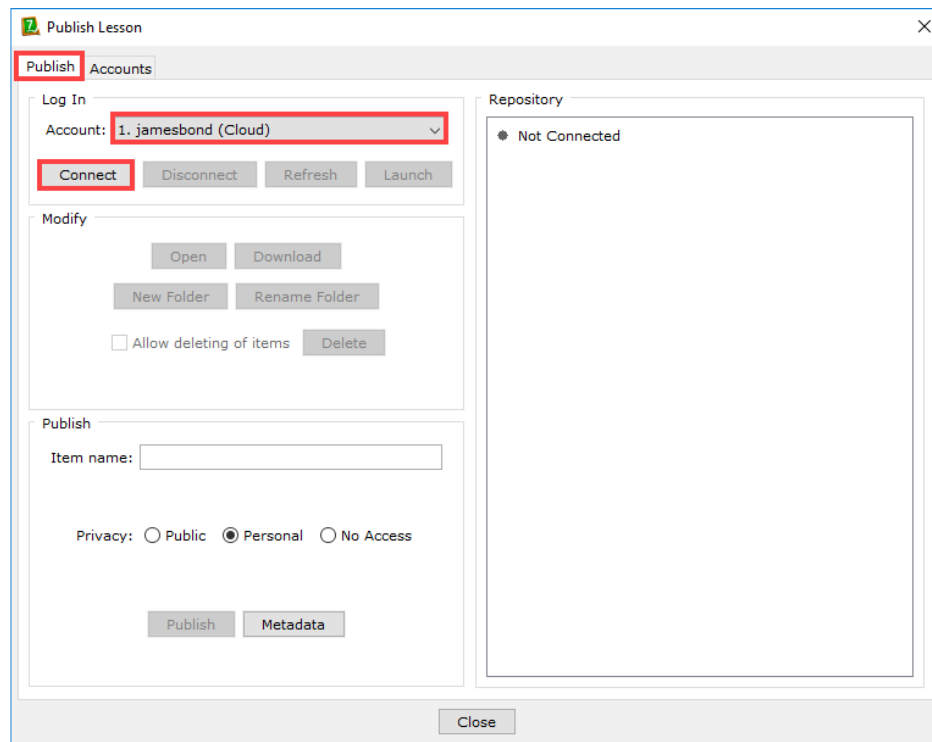
4. Enter your username and password (or click the checkbox to be prompted for your password). If your institution has an Enterprise SoftChalk Cloud, then enter the URL for your enterprise cloud (see below). Click **OK**.



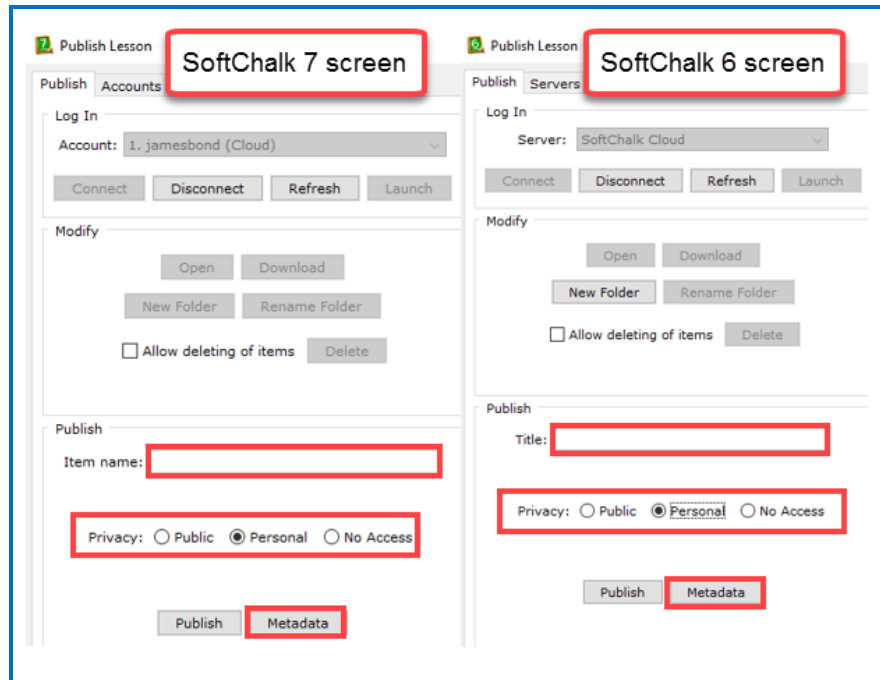
5. Your username should appear. Click the **Publish** tab (see below).



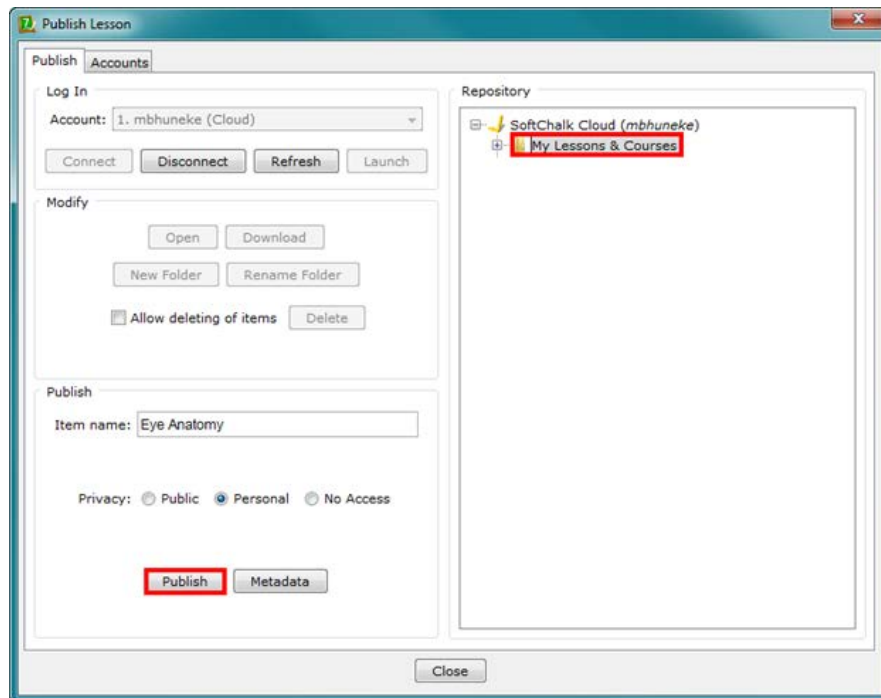
6. Make sure your account is selected in the Account dropdown menu and click **Connect** (see below).



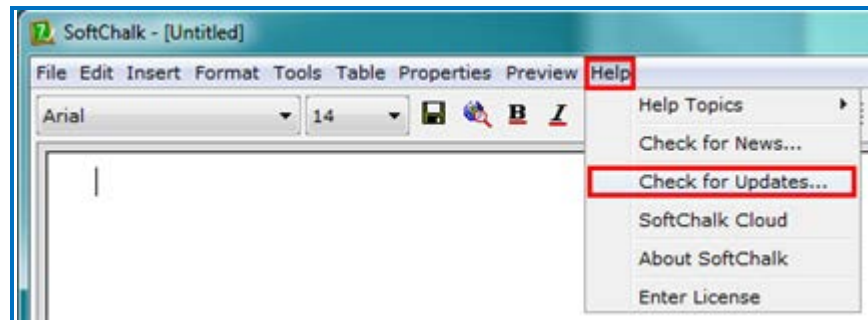
- At the bottom left, enter an **Item name** (see below). (In SoftChalk 6, this field is called **Title**.) Then select a privacy option (see the section [Privacy Options](#)). You may need to enter **Metadata** as well. For details on Metadata, see the **Metadata** section in the [SoftChalk Create Guide](#).



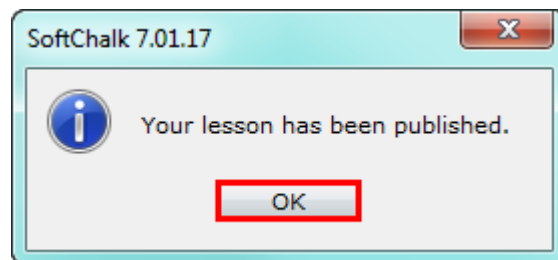
- At the right select the folder where you want to publish your lesson such as **My Lessons & Courses**. Click **Publish** (see below). If you don't select a folder at the right, your **Publish** button will be disabled.



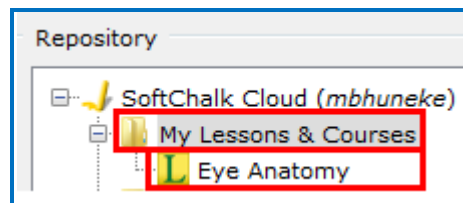
**IMPORTANT:** If you happen to have error messages publishing your activity or quiz group, please make sure that you have the latest update. Within SoftChalk, go to the Help menu and choose **Check for Updates** (see below).



9. Click **OK** at the publish confirmation screen (see below).



10. You should see your published lesson (see below). In SoftChalk 7 and SoftChalk 6, you will see **My Lessons & Courses**. This folder name was later changed to **Lessons**.



11. For details on editing and replacing your lesson, please see the section [Create and Modify Your Content in SoftChalk Cloud](#).

---

## Save Your Activities and Quiz Groups to SoftChalk Cloud

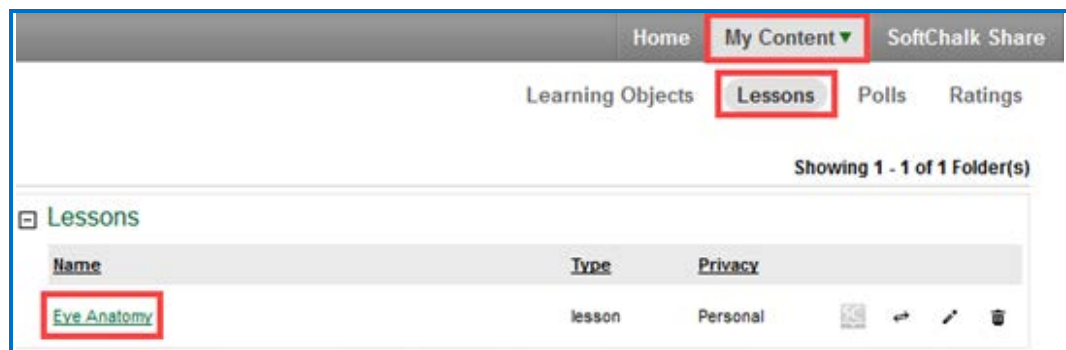
You may have an activity like a crossword puzzle or a group of questions that you would like to use in more than one lesson. You can easily save this item (an activity or group of questions i.e. Quiz Group) to your SoftChalk Cloud account and then insert this item into your lesson. You have two options for saving an activity or a Quiz Group into your SoftChalk Cloud account:

- [Option 1](#) - Save the lesson to the Cloud, open the lesson in the Cloud and then right-click on an item and choose **Save to SoftChalk Cloud**.
- [Option 2](#) – If you have already saved items to your SoftChalk Library using your desktop version of SoftChalk, you can save items from your SoftChalk Library to your Cloud account.

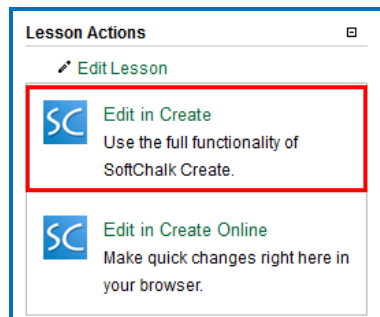
---

### Option 1 – Save the Lesson to the Cloud and Then Save the Item to the Cloud

1. Save your lesson to the Cloud (see the section [Save Your Lessons to SoftChalk Cloud](#)). Once your lesson is in the Cloud, log into your Cloud account at <https://softchalkcloud.com>. The login link is in the upper right corner. (If your institution has an Enterprise SoftChalk Cloud, you will go to that URL rather than <https://softchalkcloud.com>.)
2. Choose **My Content / Lessons**. Click on the name of the lesson you want to edit (see below).

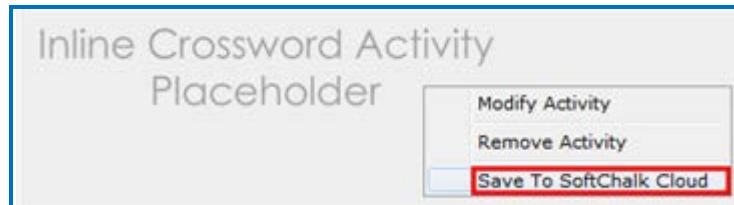


3. Scroll down to the **Lesson Actions** area at the bottom right. Click **Edit Lesson** and select **Edit in Create** (see below).

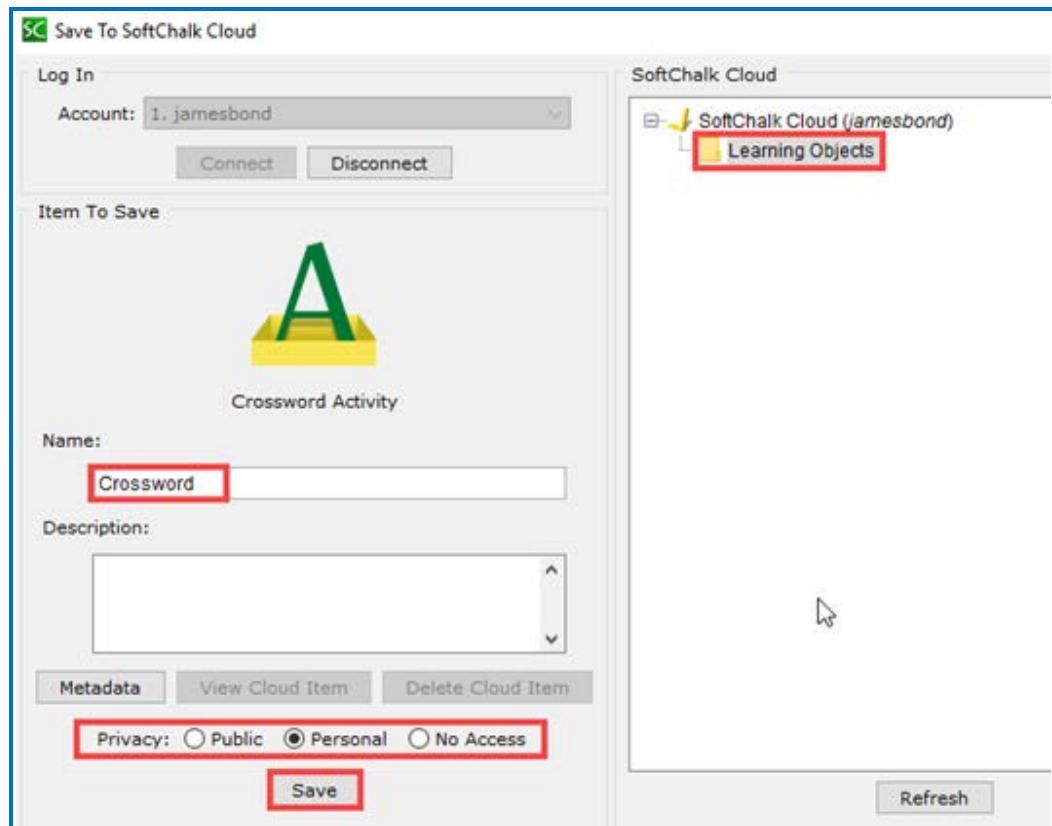




- If you are using SoftChalk Create for the first time from your SoftChalk Cloud account, you will be asked to download an installer for Windows or Macintosh. If you need help with the installation, please see the section **Step 2 – Install SoftChalk Create** in the [SoftChalk Cloud Quick Start Guide](#).
- Once your lesson is open, right-click on a quiz group or an activity and choose **Save to SoftChalk Cloud** (see below).



- Type a Name. Select a privacy option. (For details, see the section [Privacy Options](#). If you choose **Public**, you will need to enter **Metadata**. For details on Metadata, see the **Metadata** section in the [SoftChalk Create Guide](#).) Click **Save** (see below). If your **Save** button happens to be disabled, select a folder at the right.



- The item you just saved went into your **Learning Objects** folder. You can insert an item from this folder within your SoftChalk Create main editing window and choosing **Insert/SoftChalk Cloud Item**.

## Option 2 – Save Library Items to the Cloud

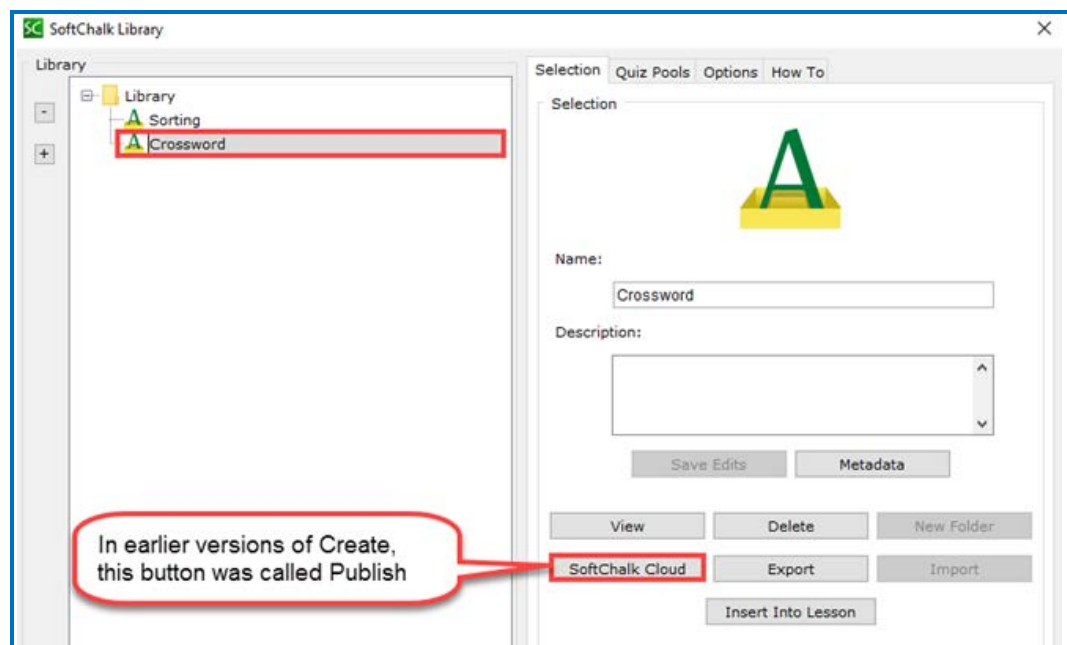
As mentioned previously, if you have already saved items to your SoftChalk Library, you can save items from your SoftChalk Library directly to your Cloud account. (For details on saving activities and quiz groups to the Library, see the section **Library** in the [SoftChalk Create Guide](#).)

1. Start your desktop version of SoftChalk by double-clicking on the green SoftChalk icon on your desktop (see below).



2. Choose **Tools/Library**.
3. At the left, select an item that you want to publish. At the bottom right, click SoftChalk Cloud (see below). (In earlier versions of Create, this button was called **Publish**). If you want to add Metadata for the item, click **Metadata**.

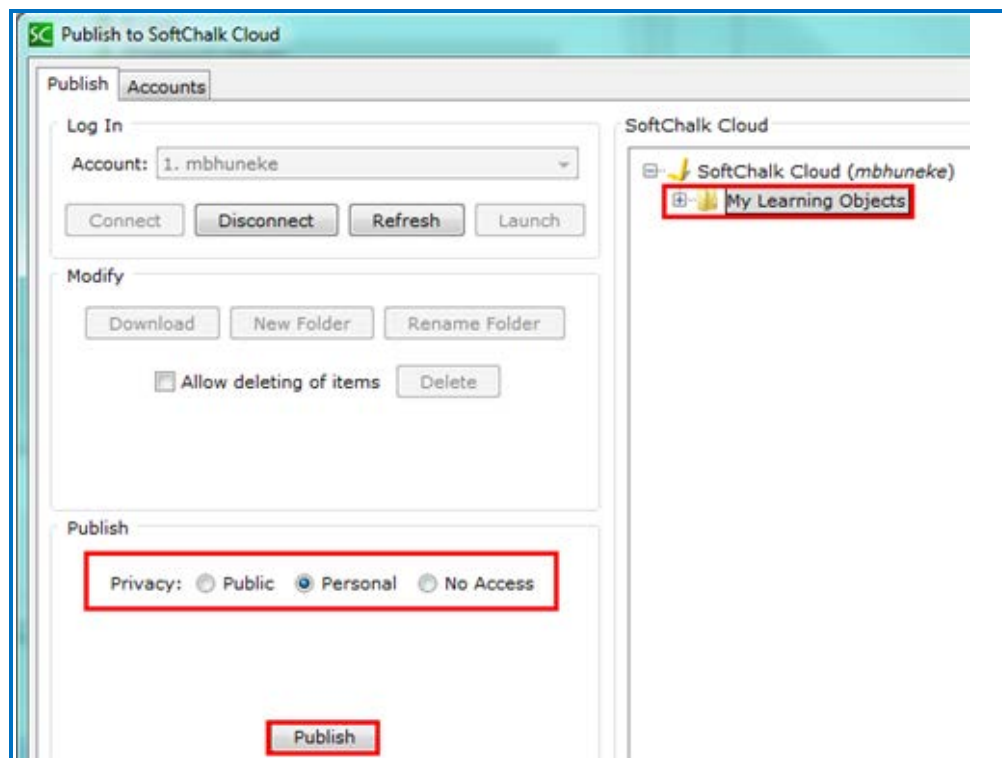
**IMPORTANT:** If you want to upload a **Quiz Group**, you must select one or more QuizPoppers at the left (or select a folder that contains only QuizPoppers).



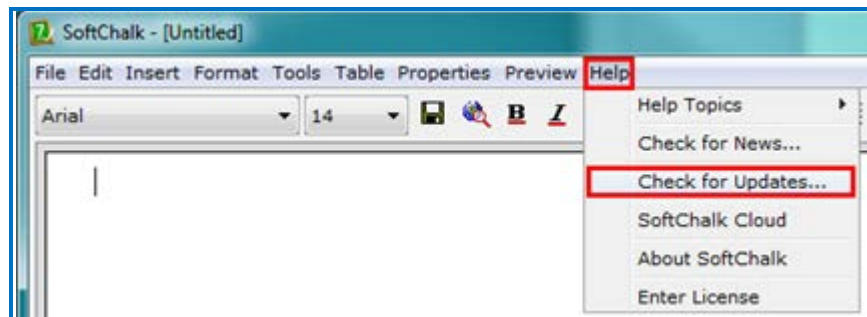
- You may be asked to enter a description, subjects and education levels. Click **OK** and fill in the information within the Metadata area. Click **OK**.
- At the right, select a folder such as **Learning Objects**. At the bottom left, choose a **Privacy** option and click **Save** or **Publish** for earlier versions of Create (see below).

If your **Save** or **Publish** button is disabled, be sure to select a folder at the right.

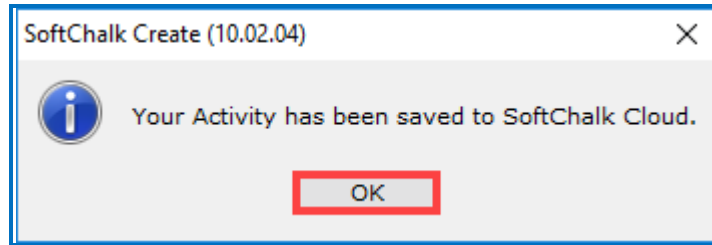
If you don't see a SoftChalk Cloud account listed, see the previous section [Save Your Lessons to SoftChalk Cloud](#) on how to enter your account information.



**IMPORTANT:** If you happen to get error messages when saving your activity or quiz group, please make sure that you have the latest update. Within SoftChalk, go to the Help menu and choose **Check for Updates** (see below).



- You should get a message that your item was saved or published (see below). Click **OK**.




---

## Create and Modify Your Content in SoftChalk Cloud

For instructions on creating and modifying your content in SoftChalk Cloud, please see the [SoftChalk Cloud Quick Start Guide](#) – see in particular the **Create Your First SoftChalk Lesson** and **Edit Your Lesson** sections.

For more details, please see the [SoftChalk Cloud Guide](#).

---

## Privacy Options

When you save your content into your [SoftChalk Cloud](#) account, you have three privacy options. You designate the privacy option when you save your content. (You can edit these options for content within your [SoftChalk Cloud](#) account as well.)

Privacy Option	Description
<b>Public</b>	Anyone can find your item in the <a href="#">SoftChalk Share</a> content repository and copy the Embed code or Hyperlink for it and/or copy your content to modify it.  You can attach a Creative Commons license to your content (see the section <b>Creative Commons Licenses</b> in the <a href="#">SoftChalk Cloud Guide</a> ).
<b>Private</b>	The item is NOT searchable in the SoftChalk Share content repository. (You, however, can find the Embed code or Hyperlink and pass it out to students or colleagues inside an LMS or outside an LMS.)
<b>No Access</b>	There is no hyperlink or embed code for your item. Only you (or others who share access to your content folders) can view or edit the item.

---

## More Information on SoftChalk Cloud

If you would like more information about using SoftChalk Cloud such as how to:

- Manage Your Content
- Deliver Lessons to Your Students
- Collaborate with Other Instructors on SoftChalk Lessons
- Create Polls and Ratings

Please see our [SoftChalk Cloud Guide](#) and [SoftChalk Cloud Quick Start Guide](#). For more information on SoftChalk Create, please see our [SoftChalk Create Guide](#).

---

## Help

Please visit our [SoftChalk Support](#) webpage. For purchase information, please contact [sales@softchalk.com](mailto:sales@softchalk.com).

---

## Copyright Information

SoftChalk™ Cloud

Copyright ©2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013  
2014 2015 2016 2017 2018 SoftChalk LLC

All Rights Reserved.