

Uploading Documents/Education to the Document Sharer and Turning it into a Course



Manage Document Sharer

Click on **Manage Document Sharer** on your Surge Learning Home Screen

Manuals

Upload files

Choose File No f...osen

Upload

Max: 15.26 MB

On the left of the screen create folders to organize your policies and/or other resources.

Type in the name of the Folder. Click **OK** to save.

Create folder

Type Folder Name

OK

Repeat these steps to create multiple folders.

To upload a policy in a folder, click on the name of the folder that you would like to add to.

Upload files

Choose File No file chosen

Upload

Max: 7.63 MB

Create folder

Files	Sort by name ▾
◇ Archived Policies	3 files
◇ Clinical Training	1 files
◇ Dietary Manual	3 files
◇ Education Hand d <small>Show files in Dietary Manual</small>	1 files
◇ Environmental Policies	3 files

To create a sub-folder within your folder/manual, type in the name of the sub-folder under CREATE FOLDER, and click OK

To upload a policy or document, click CHOOSE FILES

A window will open on your computer where you can search your computer for where the file is saved. Once you find the file, click on it and it will add to the Upload Section on the left side of the screen. Continue this process for each file.

IMPORTANT:

- Documents added **MUST** be in PDF format in order to be able to assign it and turn it into a course
- Documents that you add as Word, Excel, or PowerPoint cannot be assigned or viewed in the Document Sharer. These will simply be downloadable when staff click on it in Document Sharer.
- Document titles must not have “&” symbols. Rather, rename the title to say “and”
- Surge Learning will upload 15.26 MB at a time

Once you have selected your files and they are sitting in the Upload File section ready to go, click **UPLOAD**

Manuals >> Dietary Manual

Upload files

Choose File No file chosen

Upload

Max: 7.63 MB

Create folder

Ok

This is the Sub-Folder

Files		Sort by name ▾
◇	Section1	0 files
◇	Cook Responsibilities.pdf	106 Kb
◇	Dietary Aide Duties.pdf	9 Kb

1 folders - 2 files (116 Kb)




For more options click on the  icon to the right of the Policy title.

Here you can:

- **Rename the Document:** You must ensure that your policy title ends in **.pdf**
- **Move the Document:** In the picture below, I can move Cook Responsibilities.pdf to the folder Section1. When doing so, ensure you are spelling the folder name **exactly** as it is spelled.
- **Delete the Document:** ONLY delete if it was not assigned to staff as required. If you delete the document, it will delete all associated records of completion. IF IT WAS ASSIGNED, Create a subfolder called “Archive” and move the policy to that folder instead.
- **Duplicate the Document**




The screenshot shows a file management interface with a table of files. The table has columns for file names and sizes. A context menu is open over the file 'Cook Responsibilities.pdf', which is highlighted with a green circle. The context menu options are: Rename, Move, Delete, and Duplicate. The 'Rename' option is selected, and a 'Rename to:' dialog box is visible, showing the current filename 'Cook Responsibilities.pdf' and an 'Ok' button. Below the table, a summary bar indicates '1 folders - 2 files (116 Kb)'.

Files		Sort by name ▾
	Section1	0 files
	Cook Responsibilities.pdf	106 Kb
	Dietary Aide Duties.pdf	9 Kb

1 folders - 2 files (116 Kb)

Before assigning the Course, make sure it is in the appropriate folder/subfolder and is renamed accordingly. If you assign the course and THEN move/rename it, the course will no longer work for staff (as the warning below suggests).

 Warning: moving or renaming files that have been made in to a course will cause the course to no longer work. Please contact support for further details.

To Assign the Document:

1. Go back to DOCUMENT SHARER and **click on the Document Title** to ensure it is visible on the right side of the screen. If it is not displaying, go back to Manage Document Sharer and check to ensure the title is appropriate (ending in .pdf). Again, if it is a Word, Excel, or PowerPoint (PPT) you will not see it on the right side (It will download to your computer instead).

Home >> Document Sharer

Document Sharer

Hide Directory Tree

[demo] 00 New
[demo] 0 New Manual
[demo] 00Test
[demo] 001 New Manual
[demo] Archived Policies
[demo] Caregivers-Visitors
[demo] Clinical Training
[demo] COVID-19 Information
[demo] Dietary Manual
[demo] Environmental Policies
[demo] Food Services Manual

readpdf.php 1 / 1 91%

Hello world!!

Management icons: Home, Document Sharer, Manage Users, Live Event, Reports

Buttons: Add this policy to the course library, Manage Document Sharer

A pink arrow points to the document title "[demo] 00 New" in the directory tree. A pink star is overlaid on the document preview.

Click on **ADD THIS POLICY TO THE COURSE LIBRARY**

Home >> Document Sharer

Document Sharer

Hide Directory Tree

[demo] 00 New
[demo] 0 New Manual
[demo] 00Test
[demo] 001 New Manual
[demo] Archived Policies
[demo] Caregivers-Visitors
[demo] Clinical Training
[demo] COVID-19 Information
[demo] Dietary Manual
[demo] Environmental Policies
[demo] Food Services Manual

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Hello world!!

Management icons: Home, Document Sharer, Manage Users, Live Event, Reports

Buttons: Add this policy to the course library, Manage Document Sharer

A pink arrow points to the "Add this policy to the course library" button, which is highlighted in yellow.

You will then proceed to a different screen.

The details of your Document Name will display here. **NO NEED TO ADJUST ANY OF THESE FIELDS (EXCEPT THE COURSE LENGTH IF YOU ARE USING THE TIMED COMPLETION).**

SCROLL DOWN TO THE BOTTOM OF THE SCREEN

Add / Edit Course

Course Name:	<input type="text" value="demo-pdf.pdf"/>
Course Length:	<input type="text" value="00:00:00"/> (hh:mm:ss)
Author:	<input type="text"/>
This is a Chapter/Bundle Course:	<input type="checkbox"/>
Flash Required:	<input type="checkbox"/> This will add a prompt for user to turn flash on
Last Updated:	<input type="checkbox"/>
Test ID:	<input type="checkbox"/>
File Location:	<input type="text" value="External"/>
<small>When linking to external websites, please make sure to get the website owner's permission</small>	
File Path:	<input type="text" value="http://www1.surgelearning.ca/files/manuals/demo/00 New/demo-pdf.pdf"/>
Open in New Window:	<input type="checkbox"/> This will force the user to watch the content in a new window and should only be used if you know what you are doing
Use SCORM Logic:	<input type="checkbox"/> This will use the SCORM logic to trigger completion and should only be used if you know what you are doing
Use AICC Logic:	<input type="checkbox"/> This will use the AICC logic to trigger completion and should only be used if you know what you are doing

At the bottom of the screen:

- Select the Category you would like it to go under in the Course Library. If you would like to create a new category, click ADD.
- **ACTIVE STATUS** – Check this off to ensure staff are able to see it as an active course.
- **Submit and Go Back to the Library:** Saves the course, adds it to the library but DOES NOT assign it.
- **Submit and Continue:** Saves the course, and allows you to add a test if needed.
- **Submit and Set Required:** Allows you to assign the document as a required reading.

Category:	<input type="text" value="Policies and Procedures"/>	<input type="button" value="Add"/>
Active Status:	<input type="checkbox"/>	
<input type="button" value="Submit and Go back to Library"/> <input type="button" value="Submit and Continue"/>		
<input type="button" value="Submit and Set Required"/>		

- Select the Education Group you would like to assign it to.
- If you would like to assign it to ALL STAFF, select that group (you **do not** also need check off the other groups – ie. Nursing – as Nursing Staff should also be under ALL STAFF in Manage Users).
- ORIENTATION IS ASSIGNED DIFFERENTLY AND WE WILL DO THAT ASSIGNMENT AFTER THIS ONE.

Required Groups:

- All Direct Care Staff
- All Staff
- Board
- Contractors
- Demo Annual
- Demo Orientation
- Dietary
- Education Coordinator
- Leadership
- Nurse Manager
- Nursing Practitioner
- Orientation - ALL STAFF
- Orientation - Direct Care Staff
- Orientation - Nurse Practitioner
- Orientation - Registered Staff
- Orientation Demo
- Policy Staff Demo
- PSW
- RAI Coordinator
- Recreation
- Recreation Manager
- Registered staff
- RPN
- Social Work
- Support Services
- Test
- Test Group
- The Fun Department

Exempt These Users: For

Required By: Date: Days Past:

Year: Specific Year Every Year Every 2 Years Every 3 Years One time Ever

Select a due date in which you would like staff to complete the course (AVOID DEC. 31)

Select your frequency of assignment. This is easy to change at a later date.

If you would now like to set up an assignment for Orientation, click **SUBMIT AND CREATE A NEW INSTANCE**. If not, just click SUBMIT.

This time select your Orientation Group

- Required Groups:
- All Direct Care Staff
 - All Staff
 - Board
 - Contractors
 - Demo Annual
 - Demo Orientation
 - Dietary
 - Education Coordinator
 - Leadership
 - Nurse Manager
 - Nursing Practitioner
 - Orientation - ALL STAFF
 - Orientation - Direct Care Staff
 - Orientation - Nurse Practitioner
 - Orientation - Registered Staff
 - Orientation Demo
 - Policy Staff Demo
 - PSW
 - RAI Coordinator
 - Recreation
 - Recreation Manager
 - Registered staff
 - RPN
 - Social Work
 - Support Services
 - Test
 - Test Group
 - The Fun Department

For the **Required By** date, select **DAYS PAST** and type in the number of days you would like the course to be done after bringing a new staff member on board. Using the example “3”, when you add a staff member into the system July 15th, their Orientation will be due 3 days from that date. When you add a staff member into the system October 12th, the due date for that employee will be 3 days after they are added to the system.

Required By: Date: Days Past: Days After Start Date/Anniversary

Year: Specific Year Every Year Every 2 Years Every 3 Years One time Ever

Choosing EVERY YEAR will ensure your Orientation Course(s) are assigned for next year so you don't have to set it up again.

DO NOT USE ONE TIME EVER. Even though Orientation is done once ever, this button will never ask them to do the course again, even for their annual education.

If you assigned the course but it is not showing up in the library... You may have missed a step! Remember that ACTIVE STATUS checkbox?

Category: Policies and Procedures Add

Active Status:

Submit and Go back to Library Submit and Continue

Submit and Set Required

You may have missed it, and that's okay! Here is how you can find your course.

DO NOT RETRACE YOUR STEPS AND TRY TO ADD IT AGAIN. The system will tell you that the course title already exists.

- Go to the **COURSE LIBRARY**.
- Using the dropdown menu in the Search Filters, select **INACTIVE COURSES** and Click **GO**

Courses Library

Search

Search For Course... Go

Do not show site libraries Inactive Courses

Include Hidden

Find your Course Title and click on the **PENCIL ICON**



A new screen will appear. Scroll to the bottom of the screen and click the checkbox for ACTIVE STATUS so the checkmark appears.

Category: 00 Tutorial Add

Active Status:

Submit and Go back to Library Submit and Continue

Submit and Set Required

Click **SUBMIT AND GO BACK TO THE LIBRARY**. If you have already set up your assignment, you do not have to re-do this step. Always go back to the library and test the course to make sure it opens properly!