

When an Employee Uses Surge Learning in Their Other Workplace

It is not uncommon that one of your Employees uses Surge Learning in another workplace. It is possible for us to Merge their profiles to minimize duplication of assignments.

What information gets transferred in a merge – Any courses in the library that are generic within Surge, and are visible in both libraries. Test history from those applicable courses will get carried over as well.

What does not get merged – Anything specific to one of the sites, such as Policies and Procedures, Live Events, and custom education. For example: if an employee does a Health and Safety module/policy review specific to one site, it will not exempt them from doing the Health and Safety training at the other site.

To merge profiles, contact support@surgelearning.ca and let them know the following:

1. You would like to merge profiles for one (or more of your employees)
2. Provide the First and Last name of the Employee
3. The name of your site, and the other site your Employee uses Surge with

Please be aware that the merge may not be possible if the other site has informed us that they do not want to be merged with. Some Organizations pay their staff based on what they have completed, and they don't want to pay their staff for things being done elsewhere where they are also potentially getting paid to do it.

Transferring Education Records Between Your Own Sites – When an Employee Relocates

Scenario: You are an Education Coordinator overseeing a multi-site database. A staff member is leaving **Site 1** and is going start employment at **Site 2**. How do you transfer their education history from one site to the other.

1. Add the Employee to **Site 2**, as a new user (if you haven't already). If it says the username already exists, try a different username combination (like whole name)
2. Go to **Site 1 > Manage Users** and **click on the user's name**. If you have already made them inactive, use your filter in Manage Users to pull up your Inactive Users, and then click on their name.
3. After clicking on their name, in the TOOL panel on the right side of your screen, click **EXPORT EDUCATION HISTORY**. A file will download to your computer.
4. Go to **Site 2 > Manage Users > Click on their name**
5. In the TOOL section on the right side of the screen, click **IMPORT USER EDUCATION** to upload the file to transfer their records.