Understanding Access Levels
in Surge Learning

There are **5 different user levels** that are available in Surge Learning.

Below are the levels from HIGHEST (most access) to LOWEST (least access)

1. System Administrator
2. Education Coordinator
3. Department Supervisor
4. Restricted User
5. Group Restricted User

Below are some descriptions / examples of each:

System Administrator – This is what we call a "Superuser". A Superuser has the ability to assign/unassign education, add/remove users, add/remove custom education, manage the accessory tools in the system (Survey, Custom Assessment, Skills and Credentials, etc). A System Administrator can pull course completion reports on anyone in their database. When adding a new user, a System Administrator can add another System Administrator, and anyone in another level below that.

Education Coordinator – Also a "Superuser" role. This role has the ability to assign/unassign education, add/remove users, add/remove custom education, manage the accessory tools in the system (Survey, Custom Assessment, Skills and Credentials, etc). An Education Coordinator can pull course completion reports on anyone in their database. When adding a new user, an Education Coordinator can add another Education Coordinato and anyone in another level below that, but cannot add a user higher than this level (ie: An Education Coordinator could not add a System Administrator).

Typically, the functions are the same between the System Administrator and Education Coordinator. If there are too many "Superusers" in Manage Users, you may decide to dedicate 1-2 people to be System Administrators and give them access to Settings, so the other "Superusers" have access to the other Superuser functions without access to Settings. Settings control what people see/don't see in the system, so limiting the amount of people making changes to this area is ideal.

Department Supervisors – Department Supervisors need to be able to see how their staff are doing with their Education. Having this access allows them to view reports for course completion for the staff within their department only. In order for them to be able to pull these reports on their staff, they not only need this access, but they also need to be noted as "Supervisor 1" or "Supervisor 2" in a staff member's profile in Manage Users.

User – This will be your staff. Nursing, Housekeeping, Dietary, Laundry… Your staff need to be able to log in and access assignments, resources, and the ability to update their own password.

Restricted User – This is designed for those who do not need as much access as staff, but who need to be able to complete education in a way where you can pull reports to see that _John Doe_ has done their assigned training. An example of this would be Students, Contract Service Providers, Volunteers, etc. People in this group should not be added to your "All Staff" Education Group, and you would set up an Education Group applicable to these examples so you can assign education to them.

Group Restricted User – This is typically used for a family/friends account for the persons you serve, and/or their loved ones. This user group typically gets to see "My Courses". You would create an Education Group called "Family Members" and you can recommend resources to that group so they can see it in My Courses.

The username and password for this group would be used by multiple people, therefore it is impossible to see that Mrs. H's Daughter looked at this Welcome Package, and Mr. J's Son reviewed some policies.

WHO has access to WHAT in Surge Learning?

When a new database is created, Surge Learning has a general level of access set for the various areas of the system. This is visible, and controlled through, the Settings icon under the tab USER ACCESS.

LMS

My Courses	Group Restricted User	or higher
Courses Library	User	or higher
Document Sharer	User	or higher
Custom Assessment	Group Restricted User	or higher
My Profile	Restricted User	or higher
Employee Review	Department Supervisor	or higher
Reports	Department Supervisor	or higher
Manage Live Event	Education Coordinator	or higher
Live Event	User	or higher
Survey	User	or higher
Manage Survey	Education Coordinator	or higher
Manage Locations	Department Supervisor	or higher
Manage Users	Department Supervisor	or higher
Add New User	Department Supervisor	or higher
Manage Usernames	Department Supervisor	or higher
Skills And Credentials	Department Supervisor	or higher
Add/Edit Skills	User	or higher
Education Groups (Department Categories)	System Administrator	or higher

This area of settings shows the LOWEST LEVEL of access able to see this particular area in the system, and anyone higher than that access would see it as well.

If you look at the example of Surveys, a User (and higher) has the ability to SEE the Survey icon so they can complete Surveys assigned to them. The Education Coordinator and higher have the ability to Manage Surveys so they can build surveys and assign them to staff.

Save Changes

Save Changes For All Locations

Once you make your changes click SAVE CHANGES to apply them. If you are a Corporate Database who oversees multiple sites, you will see the ability to apply your changes to all locations.

As you can see the User Access is very customizable, HOWEVER, there are some limitations. A common example is: wanting to allow Department Supervisors to assign education to their departments.

Currently an Education Coordinator and System Administrator have the ability to assign to education groups. IF this is changed to Department Supervisors or higher, a Department Supervisor can not only assign to their department, they can assign to **any department**. This can get quite messy if Department Supervisors aren't shown how to do this properly. They can also unassign things as well, which can get risky if they unassign something important by accident!

| Set Required Education To Department | Education Coordinator ∨ | or higher |
| Set Required Education To User | Department Supervisor ∨ | or higher |

Department Supervisors DO have the ability to go into Manage Users and assign education to specific staff members. If there is something that needs to be assigned to the whole group, the Education Coordinator or higher can assist in assigning the course to that specific group.

Some final notes:

- Education Coordinators and System Administrators, having the highest level of access, have the ability to remove things out of the system. It is always better to INACTIVATE something, rather than deleting it, as inactivating it will retain the history of it (ie: Course Completion Records), vs deleting (which in turn deletes the records along with whatever you are deleting)
- If you have a staff member who is promoted to a Department Supervisor role, Education Coordinators and System Administrators can go into Manage Users, click on the person's name, and update the person's access level anytime.