

# **The HealthStream Learning Center**

Administrator User Guide

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## Table of Contents

<b>About the HealthStream Learning Center .....</b>	<b>1</b>
<b>Administrator Profiles .....</b>	<b>21</b>
<b>Administrators .....</b>	<b>23</b>
<b>Alerts .....</b>	<b>27</b>
<b>Annotations.....</b>	<b>43</b>
<b>Assignments.....</b>	<b>47</b>
<b>Buildings and Resources .....</b>	<b>75</b>
<b>Categories .....</b>	<b>81</b>
<b>CE Center .....</b>	<b>83</b>
<b>CE Credit Management.....</b>	<b>85</b>
<b>Certification-Based Assignments .....</b>	<b>99</b>
<b>Certification Management .....</b>	<b>105</b>
<b>Checklist Management .....</b>	<b>109</b>
<b>Classes .....</b>	<b>123</b>
<b>Courses.....</b>	<b>159</b>
<b>Course Bundles.....</b>	<b>231</b>
<b>Curricula.....</b>	<b>235</b>
<b>Document Management.....</b>	<b>247</b>
<b>Easy Instructor.....</b>	<b>251</b>
<b>Equivalents .....</b>	<b>259</b>

<b>HealthStream Authoring Center .....</b>	<b>269</b>
<b>HealthStream ePortfolioTM.....</b>	<b>295</b>
<b>HealthStream Services.....</b>	<b>319</b>
<b>Institution Management .....</b>	<b>321</b>
<b>Learning Events .....</b>	<b>327</b>
<b>Maintenance of Competency .....</b>	<b>335</b>
<b>My Connections Link Management.....</b>	<b>353</b>
<b>OneSource .....</b>	<b>357</b>
<b>Options .....</b>	<b>363</b>
<b>Reports .....</b>	<b>375</b>
<b>Students.....</b>	<b>449</b>
<b>Student Groups .....</b>	<b>459</b>
<b>AAP NRP, 7th Edition .....</b>	<b>469</b>

# About the HealthStream Learning Center

## **ADMINISTRATOR OVERVIEW**

The HealthStream Learning Center allows administrators, depending on their role and affiliation, to develop, manage, assign, and track completion of learning. The key features include:

- Access to a comprehensive library of online courses
- Ability to assign courses, equivalents, and curricula for student completion
- Course, equivalent, and curriculum development tools that allow educators to create education that utilizes a blended learning approach
- Administrator control over student class registration
- Online transcript management
- Compliance tracking and reports
- Management of student data
- Generating reports

## **ADMINISTRATOR ACCESS AND PRIVILEGES**

As an administrator, you will be responsible for much of the day-to-day management of the system. You may be able to perform a variety of tasks, such as:

- Managing students (employees)
- Managing student groups
- Managing other administrators
- Creating courses
- Creating equivalents
- Creating curricula
- Managing annotations
- Managing categories
- Managing CE credit functionality
- Creating student assignments
- Entering learning events
- Managing buildings and resources
- Managing job titles and departments
- Generating reports

- Maintaining your administrator account information

**Note:** Depending on your administrator role and affiliations, you may or may not be able to perform all of the functions outlined in this Help documentation.

## **NAVIGATING**

Throughout the system you will see special function buttons (**Save, Update, Pause, Next, Exit, Logout**). Whenever you make changes or choose to exit the system, be sure to use the special function buttons as opposed to clicking the **X** in the upper right-hand corner of the page. Using the special function buttons ensures that your work is saved to the system.

## **CUSTOMIZING THE SYSTEM**

Functionality can be modified by customer request to meet your institution's specific needs. For instance, certain pages can be enabled and disabled as needed.

To request feature/function customization, contact your support service.

## **ADMINISTRATOR SHOW ME HOW MODULES**

There is a library of online tutorials reviewing key administrator topics called Show Me How modules, complete with animated graphics and spoken instructions. These tutorials are available by clicking the **Show Me How** link from main tab pages.

The complete library is available under the **Show Me How** section in the online **Help** system. Show Me How modules can be stopped, forwarded, reversed or restarted as desired. In addition to the administrator topics, there is also a Show Me How available for students from the student system.

## **ACCESSING ONLINE HELP**

The context-sensitive online Help system includes Help topics that provide step-by-step instructions and reference information. Help can be accessed by clicking the Help icon in the upper right-hand corner of any page. Depending on which page you are on when you access the Help, a topic relevant to where you are in the system will display. From any topic in the Help system, you may access any of the five main areas/features of the Help. The five main areas/features of this help system are:

- Contents
- Index
- Search
- Glossary
- Print

## **CONTENTS**

The **Contents** tab presents the online Help system grouped in a series of books in an outline format. Clicking a book opens it to reveal all topics it contains. Clicking a topic displays it in the right-hand panel of the Help system. Clicking a book again will close it in order to collapse all of the topics back into the book.

## **INDEX**

The **Index** tab contains a list of clickable keywords. Clicking a keyword displays all topics that contain the selected keyword. You may also search for a keyword by typing it into the **Type in the keyword to find** box (or typing a portion of the keyword). As you type, the closest matching keyword is highlighted. Clicking a topic displays it in the right-hand panel of the help system.

## **SEARCH**

The **Search** tab enables entering search terms into the **Type in the word(s) to search for:** box and pressing ENTER. A list of matching topics appears beneath the **Search** field. Clicking a topic displays it in the right-hand panel of the help system.

## **GLOSSARY**

The **Glossary** tab contains a list of words, each accompanied by the definition. Clicking a word displays its definition at the bottom of the **Glossary** panel.

## **PRINT**

The **Print** tab enables printing the current topic that is displayed in the Help system. Click **Print** to bring up the Print window, where you can specify your printer settings.

**Note:** In addition to printing the current topic within this online Help system, a printable user guide is also available. The printable user guide contains page images, a table of contents, and index.

### **★ Tips**

- You may use Alt+H to access Help via your computer keyboard.

## **ACCESSING THE HEALTHSTREAM COMMUNITY**

The HealthStream Community is an online networking tool for administrators.

### **➡ To access the customer community:**

Click any of the following buttons found on the right side of the HLC:

- **Announcements:** Opens the main Support Page in the HealthStream Community, which highlights current Customer Notifications and Maintenance Calendars and provides easy access to all support channels.
- **HealthStream Learning Center Support:** Provides comprehensive information about the HealthStream Learning Center and its related products. You can also open or monitor a ticket in the HealthStream support site from this area.
- **Authoring Center Support:** Provides access to Authoring Center information and support.
- **HUGs Information:** Opens the HealthStream User Group site within the HealthStream Community where you can connect and collaborate with other HealthStream users.
- **Webinar Schedule:** This will take you to the HealthStream Events Calendar featuring all of our upcoming webinars.

Once you have accessed the community, you can use the search box in the upper right to find any other content.

**Note:** If you had access to the customer community before June 16, 2011, your user ID and password may have been different from the user ID/password that you use to access the HLC. On June 16, 2011, the customer community was updated to accept HLC credentials, and your account was updated accordingly. If you are prompted for a user ID and password, enter the same credentials that you use to access the HLC. If you cannot access the customer community, please contact your HealthStream Customer support service representative.

## LOGGING ON

The HLC is a highly secure web site. You must have a user ID and password to access the system.

### To log on to the system:

1. Use one of the following ways to log on:

- Open Internet Explorer and type the web address (also called a URL) provided by your administrator (for example: [www.healthstream.com/abc/FacilityName](http://www.healthstream.com/abc/FacilityName)).
- You may have an HLC icon on your PC desktop or your institution's intranet. If so, double-click the icon. The *Login* page appears.

2. In the **User ID** box, enter your user ID.

3. In the **Password** box, enter your password. Passwords are case-sensitive. **Note:** *If you have forgotten your password, enter your user ID and click **Password Reminder** (if available).*

4. Click **Login**. The *Site Map* appears by default unless you have more than one role within the system that share the same user ID and password (see *Login Options* below).

## LOGON OPTIONS

You may have more than one role in the system, both of which use the same user ID and password for access. When logging in, you will be presented with the *Select Affiliation* page and will choose which role you wish to log into. After completing activities in one role, you may wish to switch to the other role.

1. Click the role name (*Student* or *Administrator*) to the right of your name and institution. The *Select Affiliation* page appears.



2. Click **Administrator** or **Student** beside the desired institution.

3. Select the **Make this my default selection on this computer** check box for your choice to be remembered on the computer you are on.

4. Click **Proceed with Login** to log in as either a student or administrator, depending upon the selection you made in step 2.

## PASSWORD RESET

If available, you may also reset your password. The Password Reset feature is an optional feature that can be enabled for your organization.

1. Click the **Forgot Your Password?** link on the login screen. The *Password Reset* page appears. **Note:** *This link will only appear if the password reset feature is available to you via your user role.*
2. Enter either the user ID or e-mail address for your account.
3. Click **Submit**. The system e-mails a confirmation of the password reset request to the e-mail address on file for your account. This e-mail includes instructions and a link to complete the password reset process. **Note:** *You must have a unique e-mail address on file in order to receive the e-mail. If your account does not have an e-mail address on file, or if the submitted e-mail address is associated with more than one account, an error message will display.*
4. Click the link provided in the e-mail. The *Reset Your Password* page appears.
5. In the **New Password** box, enter a new password.
6. In the **Confirm New Password** box, enter the new password again.
7. Click **Submit**. A success message will display if your new password meets the rules set for passwords at your organization.
8. Click **Login Now**. You are returned to the login page, where you can enter the user ID and new password.

## LOGGING OFF

Click **Log Out** on the right-hand side of the menu bar when you wish to exit the system. If you do not exit, the system will automatically log you out after 20 minutes. The administrator logout time can be changed by contacting your HealthStream Support Service or by utilizing the optional Manage Organizational Properties feature to set timeouts.

When you log off, you are logged off from any other applications that share a user name, including SimStore, SimDeveloper, and the Insight Into Action Community.

## MENU BAR

The menu bar is divided into several main tabs:

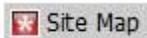


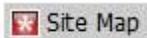
- **People** - Includes student, student group and administrator management functionality
- **Courses** - Includes course, equivalent, and curriculum development, category management, annotations management, and CE credit management functionality
- **Education** - Includes assignments, class management, and learning event functionality
- **Reports** - To access people, course, education, and tools reports, as well as the Request Manager
- **Tools** - Includes building resource and institution management functions.
- **Services** - To access online Help, HealthStream resources, OneSource management, the HealthStream Customer Community and the Idea Box for submitting enhancement requests.
- **Assessments** - This tab is enabled for HealthStream Competency Center and HealthStream Performance Center customers only.
- **Simulation** – To access other Simulation features such as SimStore.
- **My Profile** - To access account information, instructor resume, business address, and system preferences.

In addition you will see a **Site Map** link, the **Discuss** link (to access the Customer Community), the **Help** icon, and a **Log Out** button in the menu bar.

## SITE MAP

The Site Map for administrators provides quick access to all features and functions available from the main tab pages.



The Site Map icon [  ] is available throughout the system. You can use Alt-8 to access the Site Map via your computer keyboard.

## KEYBOARD SHORTCUTS

Keyboard shortcuts are supported. Use the following keyboard shortcuts in the **Administrator** application to access different areas of the system.

System Area	Keyboard Shortcut	Description
People	ALT+O	Manage students, student groups, administrators, and roles.
Courses	ALT+C	Manage courses, curricula, accreditations, annotations, and categories.

About the HealthStream Learning Center

Education	ALT+E	Manage assignments, class scheduling, and learning events.
Reports	ALT+R	Access reports.
Tools	ALT+T	Manage organization and institution information, buildings, and resources.
Services	ALT+V	Accesses additional HealthStream products and services.
My Profile	ALT+I	Manage profile information and preferences.
Site Map	ALT+8	Site map containing links to all features. (The 8 is the same as *, which is used as the Site Map icon.)
Help	ALT+H	Access help for students and administrators.
Yes	ALT+Y	Selects the <b>Yes</b> option in a Session Timeout Warning.
No	ALT+N	Selects the <b>No</b> option in a Session Timeout Warning.

Save	ALT+S	Saves the page you've edited or the record you've added (for pages which contain a <b>Save</b> button) or starts a search (for pages which contain a <b>Search</b> button).
Save and Add Another	ALT+Z	Select the <b>Save and Add Another</b> option on this page.
Cancel	ALT+.	Selects the <b>Cancel</b> option on this page.
Highlight	ALT+G	Selects the Highlight greeting for both students and administrators.
Select	ALT+L	Triggers the <b>Select</b> button.
Continue	ALT+,	Triggers the <b>Continue</b> button.
Top of page	HOME Key	Brings you to the top of the page. Place cursor outside of text fields and press HOME.
Bottom of page	END Key	Brings you to the bottom of the page. Place cursor outside of text fields and press END.

## SPELL CHECK

To the right of many open-text fields you will find the spell-check icon [  ]. The dictionary includes over 160,000 words, including over 16,000 medical terms. To spell-check text entered into a text field.

Click the spell check icon. The spell-check window appears.

- If no spelling errors are detected, the **Spell Check is Complete** message appears. Click **OK**.
- If a word is misspelled, a list of suggested spellings appears. Select the desired word choice from the list, and click either **Change** or **Change All** to replace all instances of the misspelled word.
- If you do not wish to change a word's spelling, click **Ignore** or **Ignore All**.

## USING THE WYSIWYG EDITORS

Throughout the system you will find editing windows that use a WYSIWYG (What You See Is What You Get) format. Within these editing fields, you can format text exactly as you wish it to appear for students.

WYSIWYG editing windows are used for crafting:

- Annotations
- Test Questions
- Test Answers
- Test Answer Rationale
- Certificate Templates
- Evaluation Questions
- Evaluation Answers
- Edit Text

### **EDITING TEXT**

 **To edit text in the WYSIWYG editor:**

1. Type the desired text into the editing window.
2. Utilize the desired editing tools to format text, including font size, color, bold, justification etc. To edit specific text, first highlight the text.

### **INSERTING CODE SNIPPETS**

Some editing windows include Code Snippets, or placeholders for text that will be drawn into the page from other places in the system. Code snippets are used for instance, to customize certificates generated from a certificate template.

 **To insert a code snippet into a WYSIWYG window:**

1. Place your cursor within the WYSIWYG window where you wish the code snippet to appear.

2. Click the code snippet icon [  ] to reveal the code snippet list.
3. Click the desired code snippet. It will be placed within the WYSIWYG window. When inserting more than one code snippet next to each other, be sure to use the space bar to create a space between the two code snippets so that the text from each is appropriately separated.

## INSERTING IMAGES

Images can be inserted into WYSIWYG fields. Images must be hosted in an images directory on the Internet, such as your organization's web server. This process allows the images to be viewed by students while also appearing on certificates, annotations, assessments and reports (such as Test Question Analysis). The system cannot access files and images hosted behind a firewall (for example, on an intranet, shared network directory, or on a personal computer) therefore, images hosted via any of these sources will not appear. Reports will show the 'r;Alt Text' if used (described below) in place of the image if an image is not accessible.

**Note:** The Authoring directory (FTP) is not recommended for image hosting since performance may be adversely affected.

Supported image formats include JPG, GIF, or PNG graphic. Animated GIFs may be used, but only the first frame will be visible within printed reports. Flash files (.SWF) are not usable at this time.

### ➔ To add an image:

Once the image is hosted on an Internet web server, browse to the image using Internet Explorer, then copy the image (right-click it and select the **Copy** command) and paste it into the editor.

### ➔ To label an image for a report:

1. Once an image has been added, right-click on the image.
2. Click **Set Image Properties**.
3. Enter text next to **Image Alt Text** (up to 150 characters) and optionally, a **Long Description** (up to 30,000 characters). This text should simply describe the image. If it is used for a test question, be careful not to reveal the answer to a test question the image represents (for example, *Correct Answer* or *EKG Strip: Atrial Flutter*). When a user's mouse moves over the image, the image label appears.
4. Click **OK**. The text is embedded in the source code of the item where the image resides.

**Note:** Please remember to observe copyright permissions when using images other than your own.

## THE DATE SELECTOR TOOL

A date selector tool can be found throughout the system adjacent to date selection fields. Date selections can be manually populated by typing dates in using the MM/DD/YYYY format, or by clicking the calendar tool and selecting the desired date.

### ➔ To use the calendar tool for date selection:

1. Click the date selector tool icon [  ] adjacent to a date selection field. The calendar displays today's month and year.
2. In the month list, select the desired month or use the forward or back single arrows to change the month selection.
3. In the year list, select the desired year, or use the forward or back double arrows to change the year selection.
4. Click the desired day. That date will populate the date selection field.

★ **Tips**

- You may also click the **TODAY** button at the bottom of the calendar tool as a shortcut for selecting today's date.

## SEARCHING FOR COURSES, CURRICULA, AND EQUIVALENTS

Adding or managing courses, curricula, and equivalents requires use of the search engine. A variety of search methods can be used to make locating the content of your choice easier and more efficient.

The search engine page is presented with slight changes during the following processes:

- Adding or Managing Assignments (both Group Assignments and Individual Assignments)
- Managing Courses
- Running Reports
- Managing Curricula
- Managing Equivalents

### SEARCHING BY NAME OR KEYWORD

Courses, curricula, and equivalents can be searched by name or keyword. When creating content, each record is given a title, description, and keywords. When you use the search engine, the system looks for matches in the **Title**, **Description**, and **Keywords** fields in the applicable content type. The system searches for exact matches to the words you enter.

To search courses, curricula, or equivalents by name or keyword:

1. Access the appropriate *Search* page.
  - To search courses, on the **Courses** tab, click **Manage Courses**.
  - To search curricula, on the **Courses** tab, click **Manage Curricula**.
  - To search equivalents, on the **Courses** tab, click **Manage Equivalents**.
2. Enter the name or keyword in the search field. The search field can also be left blank. This will return a listing of all course, curricula, or equivalents that match the development statuses included in the search

3. In **Development Status**, select the check boxes to indicate the development statuses that you want to include in the search. For example, if you'd like to search only content set to the **Approved** status, clear all check boxes except the **Approved** check box. You can also select the **Include All Versions** check box to search for all versions of the content instead of only searching for the currently active version.
4. Click **Search**. The system searches titles, descriptions, and keywords for *exact matches* to the words you entered. Results display in alphabetical order. Keyword matches in the title of the content will appear highlighted in yellow. If multiple pages of content are returned in the results, click the page numbers or arrows to navigate through the pages.
  - Click **>** to proceed to the next page of results.
  - Click **<** to return to the previous page of results.
  - Click **<<** to jump to the first page of results
  - Click **>>** to jump to the last page of results
  - Select an alternate value in the **Results per page:** field to display more or less results on a single page. The default value is 25.
5. Click the name of the desired course, curricula, or equivalent to proceed.

### SEARCHING BY PARTIAL KEYWORD AND WILDCARD

Searching by name or keyword returns exact matches on the search terms you enter. To search for courses, curricula, or equivalents with a partial keyword, the wildcard character is used. This allows you to refine your search by including variations on keywords and compound words.

To search by partial keyword:

1. Access the appropriate *Search* page.
  - To search courses, on the **Courses** tab, click **Manage Courses**.
  - To search curricula, on the **Courses** tab, click **Manage Curricula**.
  - To search equivalents, on the **Courses** tab, click **Manage Equivalents**.
2. In the search field, enter the part of the name you'd like to search and then enter an asterisk (\*), also known as the wildcard character, immediately following the last letter. For example: *heal\**.



3. In **Development Status**, select the check boxes to indicate the development statuses that you want to include in the search. For example, if you'd like to search only content set to the **Approved** status, clear all check boxes except the **Approved** check box. You can also select the **Include All Versions** check box to search for all versions of the content instead of only searching for the currently active version.

4. Click **Search**. The system searches titles, descriptions, and keywords for partial matches that include the exact sequence of letters before the asterisk wildcard character. Results will display in alphabetical order. Keyword matches in the title of the content appear highlighted in yellow. For example, the following results are returned when searching for heal\*:



If multiple pages of content are returned in the results, click the page numbers or arrows to navigate through the pages.

- Click **>** to proceed to the next page of results.
- Click **<** to return to the previous page of results.
- Click **<<** to jump to the first page of results
- Click **>>** to jump to the last page of results
- Select an alternate value in the **Results per page:** field to display more or less results on a single page. The default value is 25.

5. Click the name of the desired course, curricula, or equivalent to proceed.

## SEARCHING BY CATEGORY

To search courses, curricula, or equivalents by category

1. Access the appropriate *Search* page.
  - To search courses, on the **Courses** tab, click **Manage Courses**.
  - To search curricula, on the **Courses** tab, click **Manage Curricula**.
  - To search equivalents, on the **Courses** tab, click **Manage Equivalents**.
2. Click the **Category** link found above the search field. The screen displays with the available categories displayed on the left in the **Search by Category** area.
3. Browse the list of categories. Click the + sign next to a category name to display the sub-categories found within it. For faster browsing, press the CTRL+F key combination on your keyboard to open your browser's *Find* function. Use the *Find* function to quickly search the displayed text on the page for your category name.

4. In **Development Status**, select the check boxes to indicate the development statuses that you want to include in the search. For example, if you'd like to search only content set to the **Approved** status, clear all check boxes except the **Approved** check box. You can also select the **Include All Versions** check box to search for all versions of the content instead of only searching for the currently active version.
5. Click the category or sub-category name of your choice. The content found in that category appears in the results pane on the right. If multiple pages of content are returned in the results, click the page numbers or arrows to navigate through the pages.
  - Click **>** to proceed to the next page of results.
  - Click **<** to return to the previous page of results.
  - Click **<<** to jump to the first page of results
  - Click **>>** to jump to the last page of results
  - Select an alternate value in the **Results per page:** field to display more or less results on a single page. The default value is 25
6. Click the name of the desired course, curricula, or equivalent to proceed.

With a category selected and its content displaying in the results pane, you may search the results to narrow down to the course, curricula, or equivalent of your choice:

1. Enter the name of the content in the search field.
2. In **Development Status**, select the check boxes to indicate the development statuses that you want to include in the search. For example, if you'd like to search only content set to the **Approved** status, clear all check boxes except the **Approved** check box. You can also select the **Include All Versions** check box to search for all versions of the content instead of only searching for the currently active version.
3. Select the **Search In Course Category** check box. This indicates that the search should only include courses in the currently selected category.
4. Click **Search**. Results will display in alphabetical order.
5. Click the name of the desired course, curricula, or equivalent to proceed.

### **SEARCHING ALPHABETICALLY**

To search courses, curricula, or equivalents alphabetically

1. Access the appropriate *Search* page.
  - To search courses, on the **Courses** tab, click **Manage Courses**.
  - To search curricula, on the **Courses** tab, click **Manage Curricula**.
  - To search equivalents, on the **Courses** tab, click **Manage Equivalents**.

2. Click the **Alphabetical** link found above the search field.
3. In **Development Status**, select the check boxes to indicate the development statuses that you want to include in the search. For example, if you'd like to search only content set to the **Approved** status, clear all check boxes except the **Approved** check box. You can also select the **Include All Versions** check box to search for all versions of the content instead of only searching for the currently active version.
4. Click the letter of the alphabet to display all content that begins with that letter. Results display in alphabetical order.
  - Click the **#** to display content beginning with numerals.
  - Click **Other** to display content beginning with non-alphanumeric characters.
  - Click **All** to display all content.
5. If multiple pages of content are returned in the results, click the page numbers or arrows to navigate through the pages.
  - Click **>** to proceed to the next page of results.
  - Click **<** to return to the previous page of results.
  - Click **<<** to jump to the first page of results
  - Click **>>** to jump to the last page of results
  - Select an alternate value in the **Results per page:** field to display more or less results on a single page. The default value is 25
6. Click the name of the desired course, curricula, or equivalent to proceed.

With a category selected and its content displaying in the results pane, you may search the results to narrow down to the course, curricula, or equivalent of your choice:

1. Enter the name of the content in the search field.
2. In **Development Status**, select the check boxes to indicate the development statuses that you want to include in the search. For example, if you'd like to search only content set to the **Approved** status, clear all check boxes except the **Approved** check box. You can also select the **Include All Versions** check box to search for all versions of the content instead of only searching for the currently active version.
3. Select the **Search In Course Category** check box. This indicates that the search should only include courses in the currently selected category.
4. Click **Search**. Results will display in alphabetical order.
5. Click the name of the desired course, curricula, or equivalent to proceed.

#### **WORDS EXCLUDED FROM SEARCH**

When searching courses, curricula, or equivalents, there are a number of words that are excluded from returning search results. Searches comprised of only excluded words will return no results. If these words are included in a search along with valid search terms, they will not affect the search results in any way. For example, searching for *about fire safety* returns the same results as searching for *fire safety*.

about	after	all	also	am	an
and	another	any	are	as	at
be	because	been	before	being	best
better	between	both	but	by	came
can	come	comes	coming	could	did
do	does	doing	done	each	else
for	from	get	gets	getting	got

gotten	had	has	have	having	he
her	here	hers	him	himself	his
how	if	in	into	is	its
like	liked	liken	likes	liking	made
make	makes	making	many	may	me
might	mine	more	most	much	must
my	myself	never	now	of	on
only	or	other	others	our	out

outed	outing	outs	over	overed	overing
overs	said	same	saw	say	saying
says	see	seeing	sees	shall	she
should	since	so	some	still	stilled
stiller	stillest	stilling	stills	such	takable
take	taken	takes	taking	than	that
the	their	them	then	there	these
they	this	those	through	to	too

took	under	up	upper	us	use
very	want	was	way	ways	we
well	welled	welling	wells	were	what
when	where	which	while	who	will
with	would	you	your		

## PRODUCT AND COURSEWARE UPDATE ALERTS

HealthStream provides regular updates on its products, courseware, and partners' courseware. These email notifications are sent on the 1st Wednesday of each month, and as needed for critical alerts. We highly recommend all enterprise and institution administrators opt-in to HLC notifications (and any others of interest) at [www.healthstream.com/communications](http://www.healthstream.com/communications).

### What You Can Expect

- Feature/functionality updates
- Courseware alerts
- Downtime reminders
- Enhancement announcements

### If You Do Not Receive the Alerts That You Signed Up For

First, visit <http://hs.healthstream.com/email-preferences>. Type your email address in the **Your Email** box, ensure that all notifications you wish to receive have a check in the box next to them, and click the **Update Preferences** button.

If that does not resolve your problem, check your junk and/or spam folders. If HealthStream notifications are inadvertently recognized as spam and/or blocked by your organization's email filters, please share our Technical Requirements (click [here](#)) with your IT department. The IP address 13.111.0.239 should be whitelisted.

## HLC Administrator Guide

If you still have problems, email [notifications@healthstream.com](mailto:notifications@healthstream.com) for further assistance.

# Administrator Profiles

## MANAGING YOUR ADMINISTRATOR PROFILE

### To manage your administrator profile:

1. From the **My Profile** tab, click **Manage Account Information**. The *Manage Account Information* page appears.
2. Make the desired edits. **Note:** *You cannot edit your user ID.*
3. Click **Save**.

## MANAGING YOUR INSTRUCTOR RÉSUMÉ

All administrators with access rights to schedule classes and register students are considered to be potential instructors in the system. That means that they will be included when searching for instructors within the classroom functionality.

By entering your instructor résumé into the system, your biographical data and credentials will be visible to students if and when you are scheduled to instruct a classroom activity.

### To enter instructor résumé information:

1. From the **My Profile** tab, click **Manage Instructor Resume**. The *Manage Instructor Résumé* page appears.
2. In the **Biography** box, enter your biography.
3. In the **Credentials** box, enter your credentials.
4. In the **Comments** box, enter additional text, if desired.
5. Click **Save**.

### Tips

- Click [  ] to use the spell check feature.

## MANAGING YOUR BUSINESS ADDRESS

Administrators may choose to store business address and phone information in the system. If the information is entered, and the administrator is scheduled to instruct a classroom activity, students will be able to view the business address and phone.

### To enter business address information

1. From the **My Profile** tab, click **Manage Business Address**. The *Manage Business Address* page appears.
2. Select the **Include Address Information** check box. The page will refresh.
3. Enter the appropriate information into the boxes.
4. Click **Save**.

## MANAGING YOUR SYSTEM PREFERENCES

The system preference selection allows you to set your personal administration preferences.

The default Login page allows you to determine which page will appear upon administrator login.

You can also select a default report view from the Manage System Preferences page. You may choose to view only basic report configuration options, with a link on each configuration page to show additional options, or you may show additional options as your default report view. By showing additional options, you will be presented with all available report filters and fields when configuring your report.

### **To set your system preference:**

1. From the **My Profile** tab, click **Manage System Preferences**. The *Manage System Preferences* page appears.
2. Click the desired default login page.
3. Click **Save**.

You can also select a default report view from the *Manage System Preferences* page.

# Administrators

## ADMINISTRATOR OVERVIEW

Administrators have access to manage various elements of the platform, depending on the administrator role. Below are key points related to administrator management:

- Several default administrator roles are available. Each role has a pre-defined set of features access.
- Administrators can be given access to the entire institution, or to specified departments or subsidiary affiliations.
- Administrators can be designated to have more than one administrator role. Multiple roles can be combined into a single administrator role accessed from one login, as long as all administrator roles have the same affiliation access.
- If an administrator with full access to the institution is also a student within the system, a single login can be used for logging into both roles.
- Enterprise and institution administrators have access to add and manage other administrators. Administrator management can be enabled for all administrators. However, administrators can only add or manage other administrators at or below their own level of access. Access is defined by enabled features.
- New administrator roles can be created at the customer's request by contacting your HealthStream support service.
- All administrators with access rights to schedule classes are considered instructors - another level of administrator - whether or not they actually facilitate those activities. As instructors, those administrators will appear on an instructor search when adding instructor-led activities.

A complete description of each default administrator role is available by running the Roles Features report.

## ADDING AN ADMINISTRATOR

There are two ways to add an administrator: promote a student, or add an outside administrator. If the person you wish to add as an administrator is already a student in the system, then you can promote the student. Promoting a student copies information from the student record, and ensures that a single login can be used to access the system.

## PROMOTING A STUDENT TO AN ADMINISTRATOR

If the person you wish to add as an administrator is already a student in the system, use the Promote to Administrator feature. Promoting a student copies information from the student record, and ensures that a single login can be used to access the system.

 **To promote a student to an administrator:**

An orange asterisk (\*) indicates a required field.

1. Perform a student search. The *Manage a Student* page appears.
2. Click **Promote to Administrator** to open the *Add an Administrator* page. Data from the student record, including the student's user ID and password, are populated to the administrator record.
3. In the **E-mail box**, type an e-mail address if there is no e-mail data from the student record.
4. In the **Roles** box, select one or more administrator roles by selecting the desired check boxes.
5. In the **Affiliation** box, select the administrator affiliation; either **Institution** or **Departments**. If you select **Departments**, then select the check boxes next to the desired departments.
6. Do one of the following:
  - Click **Save**. The navigation tree on the student's general information page expands to include access to administrator information.
  - Click **Save and Add Another** if you wish to add an additional outside administrator immediately.
7. If desired, add the administrator's resume and/or business address information. Note that administrators can also manage their own resume and business address and phone from their administrator login.

**Note:** *Once a student has been promoted to an administrator, upon login, the student will be presented with the Select Affiliation page, and choose to log in as a student or an administrator.*

## ADDING AN OUTSIDE ADMINISTRATOR

Use the Add an Administrator feature when creating an administrator record for someone who is not currently a student within your database.

### **To add an administrator who is not currently a student in the system:**

An orange asterisk (\*) indicates a required field.

1. From the **People** tab, click **Add an Administrator** to open the *Add an Administrator* page.
2. In the **Last Name**, **First Name**, and **Middle Name** boxes, type the administrator's last, first, and middle names.
3. In the **User ID** box, type the user ID that this administrator will use to log on.
4. In the **Password** box, type the password that this administrator will use to log on.
5. In the **Confirm Password** box, retype the password.
6. In the **Password Reminder** box, type a password reminder.
7. In the **E-mail** box, type an e-mail address.
8. In the **Roles** box, select one or more administrator roles by selecting the desired check boxes.

9. In the **Affiliation** box, select **Institution** or **Departments**. If you select **Departments**, then select the check boxes next to the desired departments.
10. Click **Save** to save the administrator record or click **Save and Add Another** if you wish to add another outside administrator immediately.

An outside administrator can also be granted student access by clicking **Grant Student Access**. Complete the student record by making required selections such as job title and department and save the student record. Once a student record has been created, it cannot be deleted. The student can only be deactivated to prevent access to the system.

## SEARCHING FOR AN ADMINISTRATOR

### To search for an administrator

1. From the **People** tab, click **Manage Administrators**. The *Manage Administrators* page appears.
2. Enter search criteria, such as name, user ID or department affiliation.
3. Click **Search**. A listing of administrators matching the search criteria appears.
4. Click the administrator name link in the left-hand column to access the administrator record.

## EDITING AN ADMINISTRATOR RECORD

### To edit an administrator record:

An orange asterisk (\*) indicates a required field.

1. Perform an administrator search.
2. Click the administrator name link. The *Manage an Administrator* page appears.
3. Make the desired edits.
4. Click **Save** to save the administrator record or click **Save and Add Another** if you wish to add an outside administrator.

## DELETING AN ADMINISTRATOR RECORD

An administrator cannot delete his or her own administrator role.

### To delete an administrator record

1. Perform an administrator search.
2. Click the administrator name link. The *Manage an Administrator* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the administrator record.

If the administrator is also a student, or if an outside administrator has been granted student access, deleting the administrator role does not affect student access. To prevent student access to the system, the student role must be deactivated. All access (including administrator access) can be disabled for all roles when student deactivation is implemented through the data import file instead of manual deactivation.

# Alerts

## ALERTS

Users can be notified when certain events occur in the system; for example, students can be notified when they receive a new assignment, or supervisors can be notified when students they manage have past-due assignments. These notifications are referred to as *alerts*.

There are two types of alerts: *in-system* and *e-mail*. In-system alerts, as their name implies, can be read when you are logged on to the system.

E-mail alerts are e-mail messages sent to users with a valid e-mail address in the system. E-mail alerts can be configured to be sent separately or in a single summary e-mail. E-mail alert content is set through alert templates. Users who do not have an e-mail address on record can still read in-system alerts.

As an administrator, you will subscribe users to alerts; you will also manage your institution's subscription settings, alert templates, and summary e-mail delivery schedule.

## AVAILABLE ALERTS

### AVAILABLE ALERTS

Click the links below to learn about the alerts available in the HLC.

#### STUDENT ALERTS

[Student Alert: Approaching Due Date](#)

[Student Alert: Assignment Past Due](#)

[Student Alert: Certification Expiration Date Approaching](#)

[Student Alert: Certification Expiration Date Updated](#)

[Student Alert: Class Cancelled](#)

[Student Alert: New Assignment Available](#)

[Student Alert: Student Dropped from Class](#)

#### SUPERVISOR ALERTS

[Supervisor Alert: Student Assignment Past Due](#)

[Supervisor Alert: Student Certification Expiration Date Approaching](#)

#### INSTRUCTOR ALERTS

[Instructor Alert: Class Roster](#)

## INSTRUCTOR ALERT: CLASS ROSTER

- This alert is generated a number of days before a class start date. The number of days is configurable (the *Lead Days* setting).
- This alert is sent until the class start date.
- This alert is eligible for inclusion in summary e-mails until the class start date.
- If the course has multiple class sections with sessions on the same day that are taught by the same instructor, and if the alert is set to be included in a summary, then the instructor will receive a summary alert with the roster for each section in a separate section. If the alert is not set to be included in a summary, then the instructor will receive a separate e-mail for each section.
- Only class sections with sessions having a start date that fall between the current date and the date determined by the *Lead Days* setting are included in the alert.

## **STUDENT ALERT: APPROACHING DUE DATE**

- This alert is generated a number of days before an assignment is due. The number of days is configurable (the *Lead Days* setting).
- This alert is sent every day until the due date, or until the student completes the assignment, whichever comes first.
- This alert is eligible for inclusion in summary e-mails until the due date, or until the student completes the assignment, whichever comes first.
- If the same course is included in multiple new assignments for the same student, and the alert is set to be included in a summary, then only the assignment with the earliest due date is included in the summary. If the alert is not set to be included in a summary, then a separate alert will be sent for each assignment.

## **STUDENT ALERT: ASSIGNMENT PAST DUE**

- The first alert is generated a number of days after an assignment is past due. The number of days is configurable (the *Days Past Due* setting).
- This alert is sent once a day, every day, for 365 calendar days after the due date, or until the student completes the assignment, whichever comes first.
- This alert is eligible for inclusion in summary e-mails for 365 calendar days after the first instance, or until the student completes the assignment, or the assignment is deleted, whichever comes first.
- If the same course is included in multiple assignments for the same student, and the alert is set to be included in a summary, then only the assignment with the earliest due date is included in the summary. If the alert is not set to be included in a summary, then a separate alert will be sent for each assignment.

## **STUDENT ALERT: CERTIFICATION EXPIRATION DATE APPROACHING**

- This alert is generated a number of days before a certification expires. The number of days is configurable (the *Lead Days* setting).
- This alert is sent every day until the certification expires, the expiration date is extended, or the certification is deleted, whichever comes first.
- This alert is eligible for inclusion in summary e-mails until the certification expires, the expiration date is extended, or the certification is deleted, whichever comes first.

## **STUDENT ALERT: CERTIFICATION EXPIRATION DATE UPDATED**

- This alert is generated when a student's certification expiration date is updated
  - Manually by an administrator.
  - Through a course completion.
  - Through a Maintenance of Competency schedule completion.
- This alert is eligible for inclusion in summary e-mails until one year from the updated expiration date.

## **STUDENT ALERT: CLASS CANCELLED**

- This alert is generated when a class is deleted from the HLC.
- This alert is eligible for inclusion in summary e-mails until the start date of the last class session.
- The class start time will appear in the student's time zone.

## **STUDENT ALERT: NEW ASSIGNMENT AVAILABLE**

- This alert is generated the day a new assignment appears on a student's *My Learning* page (the assignment start date).
- This alert is eligible for inclusion in summary e-mails until the assignment due date.
- If the same course is included in multiple new assignments for the same student, and the alert is set to be included in a summary, then only the assignment with the earliest due date is included in the summary. If the alert is not set to be included in a summary, then a separate alert will be sent for each assignment.
- Resaving the assignment will not generate an alert, but resyncing it will, if it results in new assignments being created.

## **STUDENT ALERT: STUDENT DROPPED FROM CLASS**

- This alert is generated when a student is dropped from a class.
- This alert is eligible for inclusion in summary e-mails until the start date of the last class session.

- If a student is dropped from a class and re-enrolls, the student will still receive a *Student Dropped from Class* alert. Successful re-enrollment will not remove the alert from any summary e-mails.
- If a student is dropped from a class, re-enrolls, and is dropped again, and the alert is set to be included in a summary, then only one *Student Dropped from Class* alert (the last instance) will be included in the summary. If the alert is not set to be included in a summary, then a separate alert will be generated for each drop.
- The class start time will appear in the student's time zone.

## **SUPERVISOR ALERT: STUDENT ASSIGNMENT PAST DUE**

- The first alert is generated a number of days after an assignment is past due. The number of days is configurable (the *Days Past Due* setting).
- This alert is sent every day for 180 calendar days after the due date, or until the student completes the assignment, whichever comes first.
- This alert is eligible for inclusion in summary e-mails for 180 calendar days after the first instance, or until the student completes the assignment, or until the assignment is deleted, whichever comes first.
- If the same course is included in multiple assignments for the same student, and the alert is set to be included in a summary, then only the assignment with the earliest due date is included in the summary. If the alert is not set to be included in a summary, then a separate alert will be sent for each assignment.

## **SUPERVISOR ALERT: STUDENT CERTIFICATION EXPIRATION DATE APPROACHING**

- This alert is generated a number of days before a certification expires. The number of days is configurable (the *Lead Days* setting).
- This alert is sent every day until the certification expires, the expiration date is extended, or the certification is deleted, whichever comes first.
- This alert is eligible for inclusion in summary e-mails until the certification expires, the expiration date is extended, or the certification is deleted, whichever comes first.

## **SUBSCRIBING USERS TO ALERTS**

You can subscribe all users at your institution to (or unsubscribe them from) alerts, and apply default settings to each alert. Users can override these settings (if this ability has been enabled at your institution).

Subscriptions made at the enterprise level will NOT be applied to subsidiary institutions. If your organization has subsidiaries, you must log on at the subsidiary institution level to subscribe users at that institution.

### **To set institution-level alert defaults:**

1. From the **Tools** tab, click the **Manage Alert Subscriptions** link to open the *Manage Alert Subscriptions* page.
2. Select a delivery method, HTML or plain text (this only applies to e-mail alerts).

3. Select the alerts to which you want to subscribe the users in your institution.

- Select the check box next to an alert to subscribe users to it. Clear the check box to unsubscribe users from the alert.
- Select the **Include in Summary** check box if you want the alert to be combined with any other alerts that a user might receive into a single daily alert summary. Clear the check box if you want the alert to be delivered in an individual e-mail.
- The **Lead Days** setting is the number of calendar days before an event (e.g., due date, class start date) that the first alert will be sent. Note that alerts with a **Lead Days** setting will be sent every day until the day of the event.
- The **Days Past Due** setting is the number of calendar days after an event (e.g., assignment due date) that the first alert will be sent. Note that alerts with a **Days Past Due** setting will be sent every day until the assignment is completed, or until one year has passed.
- If you select an alert with a **Lead Days** or a **Days Past Due** setting, that setting is required and must be between 0 and 90 (inclusive).

4. Click the **Save** button.

## ALERT TEMPLATES

### ALERT TEMPLATES

Alert content is controlled through alert templates. Each event/subscriber type/delivery method/language combination can have a different alert template. Only one template can be the active alert template for any given event/subscriber type/delivery method/language combination. Selecting a template's **Make this alert template available in the system** check box makes it the active template.

### CREATING AN ALERT TEMPLATE

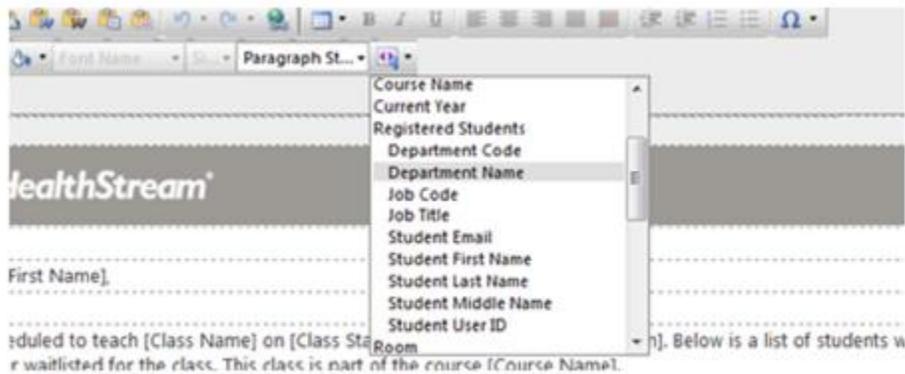
You can use the default templates provided by HealthStream, or you can create an alert template for each event/subscriber type/delivery method/language combination.

You can create as many alert templates as you want for each event/subscriber type/delivery method/language combination, but only **one** can be the active template (the template that is used by the system to generate alerts).

#### To create an alert template:

1. From the **Tools** tab, click the **Manage Alert Templates** to open the *Manage Alert Templates* page.
2. Click the **Add New Template** link to open the *Add an Alert Template* form.
3. Complete the form. Required fields are marked with an asterisk (\*).
  - Template names must be unique.

- Select the *Summary Template* option from the **Event** list if you want to create a template for digest alerts.
- Content that you add in the **Immediate Email Details** section will appear in alerts that are sent individually (i.e., not summary or digest alerts). The **Summary Email Details** section is for content that appears in summary or digest alerts.
- You can insert tokens (or “code snippets” or “dynamic placeholders”) into the content editor by clicking the token icon [  ] to display a list of available tokens. Click an item from the list to insert it into the alert content.
- Some tokens have child tokens. For example, some student information tokens are children of the *Registered Students* token. Child tokens are listed under their parent, and indented. Tokens that contain child tokens are called parent tokens.



- Child tokens must be enclosed in opening and closing parent tokens. Parent tokens are contained in double square brackets, while child tokens are enclosed in single square brackets. For example, inserting the *Student Email*, *Student First Name*, and *Student Last Name* tokens, which are children of the *Registered Students* token, would look like this: `[[Registered Students]] [Student Email] [Student First Name] [Student Last Name] [[Registered Students]]`.
- Parent tokens represent groups of records, like students registered for a course, or resources in a building. When you insert a parent token, data for each member of the group (the child tokens) will be displayed. For example, if you inserted the parent/child token combination `[[Registered Students]] [Student Email] [Student First Name] [Student Last Name] [[Registered Students]]`, and there were three students registered for a class, the alert would display the e-mail address, first name, and last name of each of the three registered students.
- If you want this template to be the active template for the event/subscriber type/delivery method/language combination, select the **Make this alert template available in the system** check box.

4. Click **Save**.

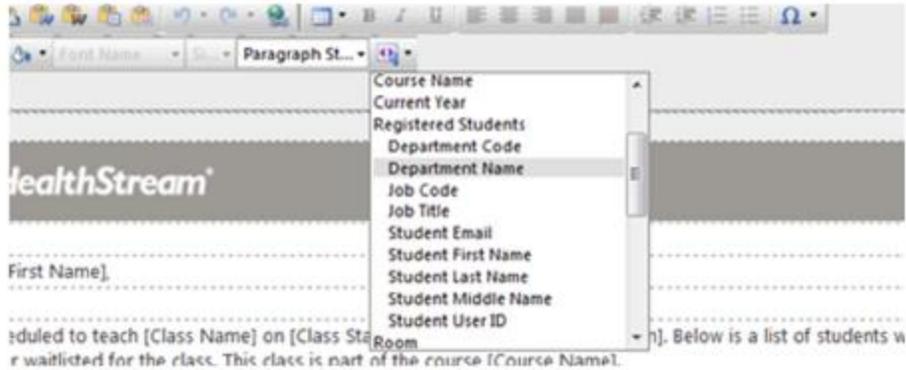
## Tips

- When creating an immediate e-mail details template, consider using color-coded headings, such as green for new assignments, yellow for approaching due date, and red for overdue items.
- Use bold text to emphasize text that you want to stand out.
- You can add images to your alert templates.

## EDITING ALERT TEMPLATES

### ➔ To edit an alert template:

1. From the **Tools** tab, click the **Manage Alert Templates** link to open the *Manage Alert Templates* page, which displays a list of alert templates in your system.
  - Yes in the **Available** column indicates that the template is currently the active alert template for a particular event/subscriber type/delivery method/language combination.
2. Click a template name from the list to open the *Manage an Alert Template* form.
3. Make any necessary edits.
  - Template names must be unique.
  - Select the *Summary Template* option from the **Event** list if you want to create a template for digest alerts.
  - Content that you add in the **Immediate Email Details** section will appear in alerts that are sent individually (i.e., not summary or digest alerts). The **Summary Email Details** section is for content that appears in summary or digest alerts.
  - You can insert tokens (or “code snippets” or “dynamic placeholders”) into the content WYSIWYG editor by clicking the token icon [  ] to display a list of available tokens. Click an item from the list to insert it into the alert content.
  - Some tokens have child tokens. For example, some student information tokens are children of the *Registered Students* token. Child tokens are listed under their parent, and indented. Tokens that contain child tokens are called parent tokens.



- Child tokens must be enclosed in opening and closing parent tokens. Parent tokens are contained in double square brackets, while child tokens are enclosed in single square brackets. For example, inserting the *Student Email*, *Student First Name*, and *Student Last Name* tokens, which are children of the *Registered Students* token, would look like this: `[[Registered Students]] [Student Email] [Student First Name] [Student Last Name] [[Registered Students]]`.
- Parent tokens represent groups of records, like students registered for a course, or resources in a building. When you insert a parent token, data for each member of the group (the child tokens) will be displayed. For example, if you inserted the parent/child token combination `[[Registered Students]] [Student Email] [Student First Name] [Student Last Name] [[Registered Students]]`, and there were three students registered for a class, the alert would display the e-mail address, first name, and last name of each of the three registered students.
- If you want this template to be the active template for the event/subscriber type/delivery method/language combination, select the **Make this alert template available in the system** check box.

4. Click **Save**.

## CHANGING THE ACTIVE ALERT TEMPLATE

You can create as many alert templates as you want for each event/subscriber type/delivery method/language combination, but only **one** can be the active template (the template that is used by the system to generate alerts).

If you have created custom alert templates and want to revert to the system default template, clear the **Make this alert template available in the system** check box for all of your custom templates.

➡ **To make an alert template the active template for an event/subscriber type/delivery method/language combination:**

1. From the **Tools** tab, click the **Manage Alert Templates** link to open the *Manage Alert Templates* page, which displays a list of alert templates in your system.
2. Click a template name from the list to open the *Manage an Alert Template* form.

3. Select the **Make this alert template available in the system** check box.
4. Click **Save**.

## ENTERPRISE-LEVEL ALERT TEMPLATES

Although alert subscriptions made at the enterprise level are not applied to subsidiaries, alert templates created at the enterprise level *can* be applied to subsidiaries, *provided that the subsidiaries do not have any active custom templates in use*.

For example, if an enterprise-level administrator creates a custom *New Assignment Available* alert template for students, with the language setting *English* and delivery method setting *HTML*, and sets that template as the active template, all of the alerts generated by subsidiary institutions for that event/subscriber type/language/delivery type combination will use the enterprise-level template, **unless** there is an active template at the subsidiary level.

## SUMMARY ALERT E-MAILS

Some users might receive more than one alert per day. By default, each alert will generate a separate e-mail. Users who prefer to receive fewer e-mails, however, can have individual alerts combined into a single summary alert by selecting the **Include in Summary** check box on the *Manage Alert Subscriptions* page (see *Subscribing Users to Alerts*). Summary alerts can be scheduled to be delivered daily, weekly, monthly, or quarterly (the default is daily at 7:00 AM in the time zone of the user's institution).

A summary alert e-mail only includes alerts that are current when the summary e-mail is sent. For example, consider a class that is created on May 2 and scheduled for May 8. Normally, an e-mail alert (Class Roster) would be sent to the instructor every day from May 2 to May 8 (if the *Lead Days* setting is set to 6). However, if the instructor is receiving the Class Roster alert in a summary e-mail, and the summary e-mail is scheduled for the 15th day of every month, the Class Roster alert will not appear in the summary at all. If the class had been scheduled for May 21, the Class Roster alert would still be current when the summary e-mail was sent, and therefore would have been included.

See *Available Alerts* for more information on how long each kind of alert continues to be sent (how long it remains current).

## SCHEDULING SUMMARY ALERT E-MAILS

### To schedule summary alert e-mails:

1. From the **Tools** tab, click the **Manage Summary Delivery Schedule** link to open the *Manage Summary Delivery Schedule* page.
  - You can also open the *Manage Summary Delivery Schedule* page from the *Manage Alert Subscriptions* page. When you save an alert subscription that has at least one **Include in Summary** check box selected, a link at the top of the page will enable you to open the *Manage Summary Delivery Schedule* page.

For each subscriber group (instructor, student, and supervisor),

2. Select a frequency option (*Daily, Weekly, Monthly, Quarterly*) from the list.
3. Click the delivery time box next to the frequency option list to open the time picker tool.

**Student Schedule**

Daily  at 07:00

**Supervisor Sched**

Daily  at

	Hour						Minute		
<b>AM</b>	00	01	02	03	04	05	00	05	10
	06	07	08	09	10	11	15	20	25
	12	13	14	15	16	17	30	35	40
<b>PM</b>	18	19	20	21	22	23	45	50	55

4. Click the hour and minute buttons to select a delivery time.
  - The time zone is the same as that of your institution.
  
5. Specify any additional settings that become available after you select a frequency option. For example, if you select *Weekly*, then you will be able to select which day of the week the summary alert will be delivered.
  - If you select the *Monthly* option, and specify the 29th, 30th, or 31st day of the month for delivery, the summary e-mail will be delivered on the last day of the month for months that have fewer days than the number you specified.
  - If you select the *Quarterly* option, and specify the 91st or 92nd day of the quarter for delivery, the summary e-mail will be delivered on the last day of the quarter for quarters that have fewer days than the number you specified.
  
6. Click **Save**.

## VIEWING YOUR IN-SYSTEM ALERTS

An **Alerts** icon at the top of the page displays the number of your unread alerts. Clicking the icon opens the *Alerts* page.

The *Alerts* page displays all alerts that you have received in the last 60 days. Alerts older than 60 days are automatically removed. You can change the number of alerts that appear on the page by selecting a number from the **Results per page** list.

### ➔ To view your alerts:

1. Open the *Alerts* page by clicking the **Alerts** icon [  Alerts (70) ] at the top of the page, or by clicking the **Manage Alerts** link on the **My Profile** tab.
2. From the list on the *Alerts* page, click an alert to open the alert details page.
  - Click the **Previous** link to move to the previous alert in the list.

- Click the **Next** link to move to the next alert in the list.
- Click the **Delete** button to delete the alert.

## DELETING ALERTS

If your organization has disabled this feature, you will not be able to delete your alerts.

### ➔ To delete alerts from your Alerts page:

1. Open the *Alerts* page by clicking the **Alerts** link in the information bar at the top of the page, or by clicking the **Manage Alerts** link on the **My Profile** tab.
2. Select the check box next to the alert(s) you want to delete.
3. Click the **Delete** button.
4. When prompted to confirm the deletion, click **OK**.

You can also delete an alert by clicking the **Delete** button on the alert details page.

## VIEWING STUDENT ALERTS

Administrators can view a student's alerts from the *Manage a Student* page. Viewing an alert this way will not change the alert's status from *unread* to *read*. An administrator cannot delete a student's alerts.

Alerts older than 60 days are automatically removed.

## ALERTS FAQ

### **A supervisor contacted me because she is not receiving alerts for some of her direct reports. What could be wrong?**

Check the student record of the students for whom the supervisor is not receiving reports, and make sure that she is listed as their supervisor. See [Selecting a Student Supervisor/Manager](#) for more information about designating supervisors.

### **I am an enterprise-level administrator, and I thought that I subscribed everyone in my organization to the *New Assignment Available* and *Assignment Past Due* alerts. I just discovered that no one in any of our subsidiary institutions is receiving them. Why aren't the alerts being delivered?**

Subscriptions made at the enterprise level will NOT be applied to subsidiary institutions. If your organization has subsidiaries, you must log on at each subsidiary institution to subscribe users there to alerts.

### **Will deleting a class from the HLC send a *Class Cancelled* alert to the students who were registered?**

Yes.

**If I set the *New Assignment Available* alert to be sent in a summary e-mail, and schedule student summary alerts to be delivered once a week on Monday, what happens if a new assignment is created on Wednesday? When will students get the alert?**

Students will receive the alert on Monday, in the summary e-mail.

**Will students who do not have an e-mail address in the HLC still be able to receive in-system alerts?**

Yes. In-system alerts do not require an e-mail address.

**Do I have to create alert templates?**

No, you can use the default templates that are provided by HealthStream.

**What happens if I create an alert template for my institution, but there is already a template that was created at the enterprise level?**

Alert templates created at the institution level will override enterprise-level templates.

## ALERTS SCENARIOS

### E-MAIL ALERT DELIVERY

Jessica is a student who is subscribed to these alerts:

- Assignment Approaching Due Date (*Lead Days* setting: 7).
- Assignment Past Due (*Days Past Due* setting: 1).
- New Assignment Available.
- Class Cancelled.
- Student Dropped From Class.

Let's look at a two-week period and see how the *Include in Summary* setting, along with summary scheduling options, can change how Jessica receives e-mail alerts.

<b>Monday, May 10</b>	<b>Tuesday, May 11</b>	<b>Wednesday, May 12</b>	<b>Thursday, May 13</b>	<b>Friday, May 14</b>
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		Jessica's <i>Electrical Safety</i> assignment is due today.	Jessica's <i>Electrical Safety</i> assignment is now past due.  A class that Jessica enrolled in was cancelled.  Jessica receives a new assignment ( <i>HeartCode BLS</i> ).	
<b>Monday, May 17</b>	<b>Tuesday, May 18</b>	<b>Wednesday, May 19</b>	<b>Thursday, May 20</b>	<b>Friday, May 21</b>
		Jessica completes her <i>Electrical Safety</i> assignment.		

If none of Jessica's alerts is included in a summary e-mail, this is what she will receive:

<b>Monday, May 10</b>	<b>Tuesday, May 11</b>	<b>Wednesday, May 12</b>	<b>Thursday, May 13</b>	<b>Friday, May 14</b>
One e-mail alert: <i>Assignment Approaching Due Date.</i>	One e-mail alert: <i>Assignment Approaching Due Date.</i>	One e-mail alert: <i>Assignment Approaching Due Date.</i>	Two separate e-mail alerts: <i>Assignment Past Due and Class Cancelled.</i>	Two separate e-mail alerts: <i>Assignment Past Due and New Assignment Available.</i>

<b>Monday, May 17</b>	<b>Tuesday, May 18</b>	<b>Wednesday, May 19</b>	<b>Thursday, May 20</b>	<b>Friday, May 21</b>
One e-mail alert: <i>Assignment Past Due.</i>	One e-mail alert: <i>Assignment Past Due.</i>	One e-mail alert: <i>Assignment Past Due.</i>	No e-mail alerts.	No e-mail alerts.

If all of Jessica's alerts are included in a summary e-mail, scheduled to be delivered daily, this is what she will receive:

<b>Monday, May 10</b>	<b>Tuesday, May 11</b>	<b>Wednesday, May 12</b>	<b>Thursday, May 13</b>	<b>Friday, May 14</b>
A summary e-mail that contains the <i>Assignment Approaching Due Date</i> alert.	A summary e-mail that contains the <i>Assignment Approaching Due Date</i> alert.	A summary e-mail that contains the <i>Assignment Approaching Due Date</i> alert.	A summary e-mail that contains the <i>Assignment Past Due</i> and <i>Class Cancelled</i> alerts.	A summary e-mail that contains the <i>Assignment Past Due</i> and <i>New Assignment Available</i> alerts.
<b>Monday, May 17</b>	<b>Tuesday, May 18</b>	<b>Wednesday, May 19</b>	<b>Thursday, May 20</b>	<b>Friday, May 21</b>

A summary e-mail that contains the <i>Assignment Past Due</i> alert.	A summary e-mail that contains the <i>Assignment Past Due</i> alert.	A summary e-mail that contains the <i>Assignment Past Due</i> alert.	No e-mail alerts.	No e-mail alerts.
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If all of Jessica's alerts are included in a summary e-mail, scheduled to be delivered each week on Monday, this is what she will receive:

<b>Monday, May 10</b>	<b>Tuesday, May 11</b>	<b>Wednesday, May 12</b>	<b>Thursday, May 13</b>	<b>Friday, May 14</b>
A summary e-mail that contains the <i>Assignment Approaching Due Date</i> alert (this alert was triggered the previous week — seven days before the <i>Electrical Safety</i> assignment's due date of May 12 — and is still valid on May 10, when the summary is generated).	No e-mail alerts.	No e-mail alerts.	No e-mail alerts.	No e-mail alerts.
<b>Monday, May 17</b>	<b>Tuesday, May 18</b>	<b>Wednesday, May 19</b>	<b>Thursday, May 20</b>	<b>Friday, May 21</b>

<p>A summary e-mail that contains the <i>Assignment Past Due</i>, <i>Class Cancelled</i>, and <i>New Assignment Available</i> alerts. The <i>Assignment Approaching Due Date</i> alert is not included because it is not valid on Monday, May 17, when the summary is generated (the <i>Assignment Approaching Due Date</i> alert is valid until the assignment due date or the date when the student completes the assignment, whichever comes first — in this case, May 12).</p>	<p>No e-mail alerts.</p>	<p>No e-mail alerts.</p>	<p>No e-mail alerts.</p>	<p>No e-mail alerts.</p>
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# Annotations

## ANNOTATIONS OVERVIEW

Annotations are electronic notes that can be added to pages within HealthStream regulatory course online content. They are used to customize course content by adding institution, job category or department-specific information. Annotations display as a separate pop-up window over the selected online page.

Students will only see annotations added at the institution level. Annotations added at the regional or enterprise level will not be visible.

## ADDING AN ANNOTATION

Students will only see annotations added at the institution level. Annotations added at the regional or enterprise level will not be visible.

### To add an annotation:

1. From the **Courses** tab, click **Add Course Annotation**. The *Browse for a Course* page appears.
2. Search for the desired regulatory course. A listing of all courses matching your search criteria appears.
3. Click the name link of the course you wish to annotate. A listing of all online content pages appears in the left-hand navigation window of the *Manage Annotations* page.
4. Click the name link of the page you wish to annotate. To preview the page, click **Preview Page**. A preview of the page displays as a secondary pop-up window.
5. Click **Add Annotation**. The page refreshes and the Annotations tools appear.
6. In the **Annotation Label** box, enter a label for the annotation.
7. In the **Annotation Content** box, create the content for the annotation using the WYSIWYG editor. Text and images may be added.
8. The **Make this annotation visible to students check box** is selected by default. Deselecting this box deactivates the annotation.
9. Click **Institution** or **Department** to select the annotation audience. If you clicked **Institution**, then all students viewing the online content will see the annotation. If you clicked **Department**, then select the specific departments that you want to see the annotation, or click **Select All** to select all of the departments.
10. Click **Job Category** if you want to specify which job categories will be able to view the annotation or click to **Select All** select all of the job categories.
11. In the **Administrator Notes** box, add any notes, if desired.

12. Click **Save**. Once the annotation is saved, a yellow sticky note will be attached to the online page in the left-hand navigation window.

If you wish to add more than one annotation to a single page, you may do so. The text for each annotation will appear on a single annotation pop-up, and will be viewable depending on the audiences chosen for each.

## SEARCHING FOR AN ANNOTATION

➔ **To search for an annotation:**

1. From the **Courses** tab, click **Manage Course Annotations**. The *Browse for a Course* page appears.
2. Search for the course in which the annotation resides. A listing of all courses matching your search criteria appears.
3. Click the name link of the desired course. A listing of all online content pages appears on the left of the *Manage Annotations* page.
4. Click the annotation icon (yellow sticky note) to display the desired annotation.
5. The selected annotation displays on the right side of the *Manage Annotations* page.

## EDITING AN ANNOTATION

**To edit an annotation:**

1. Search for the annotation you want to edit. The *Manage Annotations* page appears.
2. Make the desired edits. If you do not want the annotation to be visible to students as they view the online content, deselect the **Make this annotation visible to students** check box.
3. Click **Save**.

## DELETING AN ANNOTATION

**To delete an annotation**

1. Search for the annotation you want to delete. The *Manage Annotations* page appears.
2. Click **Delete**. A confirmation prompt appears.
3. Click **OK** to delete the annotation.

## EXPORTING AND IMPORTING ANNOTATIONS

Annotations created in one version of a regulatory course can be exported (saved) outside the HLC and then imported into another version of the course.

To move annotations from one course version to another, you must export the annotations from the current active course version prior to publishing the new course version.

## EXPORTING ANNOTATIONS

### To export annotations

1. Search for the annotations you want to export. The *Manage Annotations* page appears. The navigation tree in the left-hand side outlines each course page. Existing annotations are represented by a yellow note icon attached below the corresponding page.
2. Click **Export**. The *File Download* prompt appears.
3. Click **Save**. The *Save As* dialog appears.
4. Select a desired location, for example, your desktop, to save the annotations file. The file format is .xml. You may rename the file prior to saving, but must preserve the .xml file extension.
5. Click **Save**. The file containing the course annotations is now available for import into another course.

## IMPORTING ANNOTATIONS

In order to import annotations into the new course version, you will first need to publish the new course version.

### To import annotations into another course:

1. Search for the course into which you want to import the annotations. The *Manage Annotations* page appears. The navigation tree in the left-hand side outlines each course page.
2. Click **Import**. The *Load Import File* page appears.
3. Browse from the file location, for example, your desktop, for the .xml annotations file you wish to import into the course. Once the file is located, the *Load Import File* page refreshes, displaying the path to the file in the **File to import** box.
4. Leave **Auto-Map** selected if you want the system to automatically attempt to match page names as it places annotations in the course. Select **Leave Unmapped** if you wish to map all annotations yourself.
5. Click **Load**. A report will generate displaying the annotations within the file.

6. Click on each annotation to review its contents. Any annotations that were not successfully auto-mapped (either because the system could not map a page name correctly or because you selected **Leave Unmapped** on the prior page) will be placed in an **Unmapped** folder at the bottom of the list of contents.
7. Map the annotations to the appropriate new course page by dragging the annotations into place. **Note:** *Annotations left in the **Unmapped** folder will not be imported.*
8. Click **Continue**. The *Manage Annotations* page appears for the new course. From here, you can create additional annotations, change the target audience, and make any other desired annotation edits. Annotations are now visible to students within the annotations' targeted audience.

You can also export annotations and import them into another, unrelated course if desired.

# Assignments

## ASSIGNMENTS OVERVIEW

Administrators can deliver learning to a single student or group of students by creating an assignment. The following principles apply to assignments:

- Assignments can include one or more equivalent, curricula, or courses.
- Assignments can be made to individual students (individual assignment), or to one or more student groups (group assignment).
- Assignments can be one-time or recurring (if only courses are included).
- Assignments have a specified due date.
- Assigned courses and curricula appear on students' To-Do List.
- Several reports are based upon assignment data.
- Assigned courses may be satisfied by a learning event, including those within an equivalent or a curriculum.
- Students can be exempted from one or more course assignment instances within a group assignment. Exemptions count as assignment completions, but not course completions.

## ASSIGNMENT TYPES

There are two assignment types: One-time Assignments and Recurring Assignments.

### ONE-TIME ASSIGNMENTS

One-time assignments require a single completion of the courses or curricula within the assignment.

### RECURRING ASSIGNMENTS

Recurring assignments allow administrators to set up an assignment that will reappear at pre-determined intervals. Curricula and equivalent cannot be included in a recurring assignment.

#### Recurring Assignment Options

Recurring assignments can be set up to recur at specified intervals (daily, weekly, monthly, quarterly, or annually) by adding the numeric value and selecting the desired interval from the drop-down list. Subsequent recurrences (after the first due date) can also be set to become visible to students at the desired number of days prior to the due date.

Recurrences can be based on the *Original Due Date* of the assignment, or the *Previous Completion Date*.

Recurring assignments based on *Original Due Date* means that each assignment instance is due on the same date. For example, a recurring assignment with a specified interval of one year with a due date of 6/1/07 will be due on 6/1/08, 6/1/09, etc.

Recurring assignments based on *Previous Completion Date* means that subsequent assignment instance due dates are based upon the prior course completion.

For example, a recurring assignment based on previous completion date with a specified interval of one year with a due date of 6/1/07:

- If the assignment is completed on 5/15/07, next year's assignment will be due on 5/15/08.
- If the assignment is completed late on 7/1/07, it will be due the next year on 7/1/08.

**Note:** *It is important to consider how recurring assignments based upon previous completion date impact assignments that must be completed within a calendar year.*

## ASSIGNMENT DELIVERY RULES

Several rules are in place to ensure consistent delivery of assignments:

- The effective date of a recurring assignment cannot be backdated further than the length of the recurrence period less one day from the initial due date (for example, two-year assignments cannot be backdated more than 729 days, and a one-year assignment cannot be backdated more than 364 days).
- To ensure that the system utilizes the most recent course completion when calculating the next assignment recurrence:

When there is more than one course completion within the same assignment period, the system utilizes the most recent completion to satisfy the assignment due date. If the student completes the course late, then the system will use the first completion after the due date.

This rule causes the system to recognize the most current completion date relative to the due date.

## ASSIGNMENT TIMING

When creating an individual or group assignment, administrators will determine assignment timing. Assignment timing includes the following fields:

- **Effective Date:** the date on which the assignment begins and the system begins looking for assignment completion. The effective date defaults to the date of assignment creation, but may be back-dated to capture previous course completions. For example, an assignment is created on 6/1/07 and includes the course titled *Fire Safety*. Rather than leaving the effective date at the default of 6/1/07, the administrator back-dates the effective date to 1/1/07. Any students receiving the assignment who completed *Fire Safety* subsequent to 1/1/07 will have already satisfied that course assignment. For a recurring assignment, this is limited by (recurrence period – 1 day) rule.

**Note:** *The assignment effective date is only applicable to assigned courses, curricula, and equivalents. Effective dates for courses within a curriculum are established separately and may or may not utilize the assignment effective date. Also, when the assignment effective date is used for a sequential curriculum, the sequential setting in the curriculum takes precedence over the effective date. Existing course completions within the effective date must fall within the sequential order of the learning items within the curriculum before being bridged to the curriculum.*

- **Start Date:** the date on which students will first see the assigned learning. The default start date depends on the organization's configuration, and can be set to default to the current date, tomorrow's date, or a blank field. The start date can be set to the assignment's creation date or any date on or after the effective date (for example, January 1st of the following year). It cannot be left blank.

- **End Date:** the date at which the assignment is no longer available. Courses, equivalents, or curricula that have not been started will be removed from students' view entirely. In-progress courses, equivalents, or curricula will

become elective learning: students can complete the learning at their convenience (elective learning does not have a due date) or unenroll from it. This is an optional field. Students will not have courses, equivalents, or curricula that are due beyond the end date. *Note: If the grace period for a recurring assignment based on original due date extends beyond the due date of the assignment, the student will remain past due until the grace period has passed.*

- **Due Date:** the date the courses, equivalents, or curricula within the assignment are required to be complete. Due dates can be fixed—that is due on a specific calendar date—or relative to each student’s hire/re-hire or review dates. *Note: Once the assignment start date arrives, no changes can be made to assignment timing or assignment type other than to add or edit the assignment end date.*

### ★ Tips

- If you wish to create an assignment with a start date in the future, and you plan to use a relative due date, forward-date the effective date to equal the start date of the assignment to prevent students from being immediately past due or delinquent for the assignment (one-time) or first assignment instance (recurring assignments) when the start date arrives.
- If you wish to create an assignment with a start date in the future, and you plan to use a fixed due date, be sure that the due date is after the start date, so that students will have adequate time to complete the assignment. Edit the effective date to the date from which you wish to accept prior assignment completions, or make the effective date equal to the start date if you do not wish to allow prior completions to satisfy the assignment.

## ASSIGNMENT GRACE PERIODS

Assignments may have a grace period, depending on the assignment type and settings. These grace periods affect what appears for student status on reports as well as what students experience.

**Note:** *Students will see no messaging on page to inform them if a grace period has been applied to assigned courses or curricula.*

### ONE-TIME ASSIGNMENTS

The following rules apply to one-time assignments:

- Anyone who misses the due date becomes *past due* for that assigned item until it is completed.
- Anyone who completes an assigned item after the due date appears on reports as *completed late*.
- When an end date is applied to a one-time assignment, anyone who completes an assigned item after the due date but before the end date appears on reports as *completed late*. Anyone who does not complete an assigned item before the end date is marked *delinquent*. Courses, equivalents, or curricula that have not been started will be removed from students' view entirely. In-progress courses, equivalents, or curricula will become elective learning: students can complete the learning at their convenience (elective learning does not have a due date) or unenroll from it. Completion subsequent to the end date does not satisfy the original one-time assignment.

### RECURRING ASSIGNMENTS (COURSE ASSIGNMENTS ONLY)

#### Recurring Assignment: Next Due Date Based on Original Due Date

For recurring assignments where the next due date is based on original due date, there can be a grace period if the grace period parameter is used. If a grace period is not explicitly stated (default value is 0), there is no grace period. The following rules apply to a recurring assignment based on original due date:

- Anyone who misses the due date (with no grace period) becomes *delinquent* for that instance of the assigned item. Courses, equivalents, or curricula that have not been started will be removed from students' view

entirely. In-progress courses, equivalents, or curricula will become elective learning: students can complete the learning at their convenience (elective learning does not have a due date) or unenroll from it..

- Anyone who misses the due date and the grace period (entered in the assignment's **Grace Period** box) becomes *delinquent* for that instance of the assigned item. When the grace period ends, assigned items that have not been started will be removed from students' view entirely. In-progress courses, equivalents, or curricula will become elective learning: students can complete the learning at their convenience (elective learning does not have a due date) or unenroll from it.
- If there is an assignment end date, once the end date has passed, the student becomes *delinquent* for that instance if the assignment end date arrives before the end of the specified grace period. **Note:** *If the end date is calculated to occur before the due date, then the student will not receive that instance of the assignment, that is, not assigned.*

**Note:** *If the grace period is calculated to occur after the end date of the recurring assignment, anyone in progress will remain past due until the grace period ends. Once the grace period ends, in-progress items will become elective learning.*

**Important:** *If the student completes the course after it becomes elective learning, the completion will satisfy the next assigned course instance. When the next recurrence appears (the next assignment instance), the incomplete course will no longer be available for completion as elective learning..*

### **Recurring Assignment: Next Due Date Based on Previous Completion**

Recurring assignments based on previous completion date have an open-ended grace period for courses that are not completed by the due date. The following rules apply to recurring assignments based on previous completion date:

- Any student who misses the due date for an assigned course becomes past due for that instance until the course is completed. If not completed, the course remains visible to the student unless or until an end date is applied to the assignment.
- Any student who completes a course after the due date for that instance of the assigned course becomes completed late.
- Any student who does not complete the course prior to the assignment end date, if applied, becomes delinquent. The assigned course will be removed from the student's view entirely if it has not been started. If the course has been started, it becomes elective learning: the student can complete the learning at his or her convenience (elective learning does not have a due date) or unenroll from it.. Subsequent course completion will not change the student's delinquent status for the assignment instance.

**Note:** *If the end date is calculated to occur before the next due date, then the student does not receive that instance of the assignment, that is, not assigned.*

If the recurrence date for an assignment is set to display before the previous assignment instance due date, it is possible for a student to complete the same course more than once before the end of the first instance (that is, to have multiple completions for one assignment instance). This happens because an assignment instance ends with the due date.

If a student completes an assigned course more than once within an assignment instance, only the latest completion of the course will be applied to that due date on assignment-based reports. The student will still appear as Completed On-Time using the latter completion and will only show one completion on assignment-based reports. The student's transcript and the Course Completion reports will show all course completions.

### Example

An assigned course becomes visible to a student on 1/1/2008 and is due on 12/31/2008.

The assignment's recurrence date is 180 days. The due date is based on previous completion date.

The student completes the assigned course on 1/15/2008, making the next due date 1/15/2009.

The next course assignment appears on 7/28/2008 – 180 days prior to the due date of 1/15/09 but before the current instance's due date of 12/31/08.

If the student completes the course again - prior to 12/31/08 (the due date of the prior assignment instance), the latter course completion is the one that will satisfy that instance.

Instead of satisfying the 1/15/09 due date (which was created by the original 1/15/2008 completion), the due date will be moved further out to be one year from the most recent completion. To illustrate:

- Student sees the course again on 7/28/08.
- Student completes the course on 8/1/08.
- Due date of 1/15/09 is recalculated to 8/1/09.

When an administrator creates reports:

- The student will appear on Assignment-based reports as Completed On-Time with a date of 8/1/08 (instead of 1/15/08).
- Both completions (1/15/08 and 8/1/08) will appear on the transcript and Course Completion reports.

## INSTITUTION-SPECIFIC ASSIGNMENTS

If your institution is part of a larger hierarchy, you can have a feature enabled that allows you to determine if an assigned course, equivalent, or curriculum can satisfy more than one institution's assignment for students who have been acquired by another institution. When enabled, you can specify that assigned courses, equivalents, or curricula must be completed for your institution specifically. Otherwise, the same course, equivalent, or curriculum completed at either institution will satisfy assignment requirements for both.

Institution-specific items are indicated as such on the student's view.

### To designate an institution-specific assignment

**Note:** *If a student completes a course, equivalent, or curriculum that satisfies more than one institution assignment (institution-specific completion was not required), the completion is recorded for both or all institutions and appears on completion reports for each. If a course, equivalent, or curriculum is marked Institution-specific Completion Required, a completion occurring at another institution will not satisfy the institution-specific requirement and will not appear on that institution's completion reports. However, if a student completes an institution-specific item, that completion may satisfy a non institution-specific assignment if the former's completion date is on or after the latter's effective date.*

- I. Create a group assignment or individual assignment.

2. Prior to saving the assignment, select the check box to the right of each selected course, equivalent, or curriculum for which you want to require an institution-specific completion.
3. Click **Save**. Students receiving the assignment will now see the Institution-specific **Assigned Learning** area on their *My Learning* pages, which will include all courses, equivalents, and curricula selected as required institution-specific completion.

## STUDENT STATUS DEFINITIONS ON ASSIGNMENT-RELATED REPORTS

The following terms are used to describe student status on assignment-related reports:

- **Exempt:** the student was excused from the required assignment instance by an administrator.
- **Not Assigned:** for the specified due date range, the student was not assigned the course, equivalent, or curriculum.
- **Not Yet Due:** the due date for the assigned item shown is on or after today's date.
- **Completed On-Time:** the assigned item was completed on or before the due date.
- **Completed Late:** the assigned item was completed after the due date.
- **Completed Failed:** the assigned item was completed with a failing grade.
- **Past Due:** the student has passed the due date, but can still complete the assigned item.
- **Delinquent:** the student has passed the due date (and grace period, where applicable) and cannot complete the assigned item instance. Items that have not been started will be removed from the student's view entirely. In-progress items will become elective learning: the student can complete it at his or her convenience (elective learning does not have a due date) or unenroll from it.

## PREVENTING FAILED COURSES FROM BEING AUTOMATICALLY REASSIGNED

When a student fails an assigned course, the default system behavior is to reassign it automatically. To prevent automatic course reassignment on failure, clear the **Automatically reassign course if student fails** check box on the add assignment or edit assignment page. The statistics on the *Assignment Completion - Drill-Through*, *Assignment Completion - Schedulable*, and *Student Assignment Completion* reports will reflect whether completed courses were passed or failed.

If the **Automatically reassign course if student fails** check box is cleared, the assignment will no longer be available to any student who fails the assignment. If an assignment is edited and the **Automatically reassign course if student fails** check box is selected where it was previously cleared, the assignment may become available again, and be past due or delinquent.

If the **Automatically reassign course if student fails check box** is cleared for a recurring assignment where the next recurring due date is based on the previous completion date, the next due date will be based on the failure date, unless the student later re-enrolls and passes the course. In that case, the next due date will be based on the completion (passed) date.

This feature only applies to single- and multiple-course assignments. If multiple courses are assigned and *any* one of those courses is failed, the assignment will not be automatically reassigned. You cannot edit the **Automatically reassign course if student fails** setting if the assignment contains assessments, curricula, or equivalents.

## ASSIGNMENT EXEMPTIONS

Students who have assignments but are not required to complete an assigned item can be exempted.

- Students do not see exempted courses and curricula.
- Exempted learning items within a curriculum are visible to students, but are marked *Exempt* when the student clicks the **Enroll** button from the page.

Exempted students are marked as *Exempt* on assignment-related reports.

Course, equivalent, and curriculum exemptions can be created by student via the **Assignments** link on the student information page, by course, equivalent, or curriculum via the assignment editor page, or can be created for the entire assignment using the **Assignment-wide Exemptions** link on the assignment editor page. Exemptions for a learning item within a curriculum can only be created by student. Exemption functionality is not available until the assignment has been saved and the start date has arrived.

Students can only be exempted from group assignments.

**Note:** *Exemptions are assignment-specific. Student groups can be edited to exclude or delete students so that they do not receive any assignments made to the student group.*

If you copy an assignment that has exemptions, they will NOT be copied to the new assignment.

Students who have assignments but are not required to complete an assigned item can be exempted.

- Students do not see exempted courses and curricula.
- Exempted learning items within a curriculum are visible to students, but are marked *Exempt* when the student clicks the **Enroll** button from the page.

Exempted students are marked as *Exempt* on assignment-related reports.

Course, equivalent, and curriculum exemptions can be created by student via the **Assignments** link on the student information page, by course, equivalent, or curriculum via the assignment editor page, or can be created for the entire assignment using the **Assignment-wide Exemptions** link on the assignment editor page. Exemptions for a learning item within a curriculum can only be created by student. Exemption functionality is not available until the assignment has been saved and the start date has arrived.

Students can only be exempted from group assignments.

**Note:** *Exemptions are assignment-specific. Student groups can be edited to exclude or delete students so that they do not receive any assignments made to the student group.*

If you copy an assignment that has exemptions, they will NOT be copied to the new assignment.

## CREATING AN EXEMPTION BY STUDENT

➡ **To create an exemption by student:**

1. Perform a student search.
2. Click the name link of the desired student. The *Manage a Student* page appears.
3. Click **Assignments** from the left-hand navigation tree. The *Student Assignments* page appears.

You can now create a course exemption, an equivalent exemption, a learning item exemption from a curriculum, or a curriculum exemption. When making exemptions from the assignment page you have the option of adding an exemption comment for each exemption.

### CREATING A COURSE EXEMPTION

1. Click **Exempt** to the right of the course name associated with the specific assignment instance for which you wish to create an exemption. The *Edit Student Assignment Exemptions* page appears. **Note:** *There may be more than one instance of the course listed (if the course is part of a recurring assignment). You can exempt students from both the current and previous assignment instances if desired.*
2. Select the check box to the left of each assignment instance for which you wish to create an exemption (there may be multiple instances for a recurring assignment) or click **Select All**.
3. In the **Exemption Date** box, enter an exemption date.
4. Enter an optional exemption comment. Exemption comments are displayed on the **Assignments** page under each student profile.
5. Click **Save**.

### CREATING AN EQUIVALENT EXEMPTION

1. Click **Exempt** to the right of the equivalent name for which you wish to create an exemption. The *Edit Student Assignment Exemptions* page appears. **Note:** *There may be more than one instance of the equivalent listed (if the equivalent is part of a recurring assignment). You can exempt students from both the current and previous assignment instances if desired.*
2. Select the check box to the left of each assignment instance for which you wish to create an exemption (there may be multiple instances for a recurring assignment) or click **Select All**.
3. In the **Exemption Date** box, enter an exemption date.
4. Enter an optional exemption comment. Exemption comments are displayed on the *Assignments* page under each student profile.

- Click **Save**. The assigned equivalent will be removed from the student's *My Learning* page. The exemption date will appear below the name link of the equivalent from the administrator view of the student's assignments.

### CREATING AN EXEMPTION BY STUDENT FOR A LEARNING ITEM IN A CURRICULUM

*Note: Exempting a student from a course within a curriculum does not exempt the student from other assignment instances of the same course.*

- Perform a student search.
- Click **Exempt** to the right of the curriculum associated with the specific assignment instance for which an exemption is desired. The *Edit Student Assignment Exemptions* page appears. **Note:** *The curriculum will be listed with all its associated courses and equivalents. There are icons to help you know which items are courses, which are equivalents and which are curriculums. Any items the student has completed will appear with the status Complete and their completion date in the date column. You cannot exempt a student from an item they have already completed.*
- Select the check box to the left of each course or equivalent for which you wish to create an exemption.
- In the **Exemption Date** box, enter the exemption date.
- Enter an optional exemption comment. Exemption comments are displayed on the *Assignments* page under each student profile.
- Click **Save**. If the student has not yet started the course within the curriculum, the **Enroll** button must be clicked by the student for the system to recognize the exemption. If the student has already begun the exempted course, the exemption will be recognized immediately.

### CREATING AN EXEMPTION BY STUDENT FOR AN ENTIRE CURRICULUM

- Click **Exempt** to the right of the curriculum associated with the specific assignment instance for which an exemption is desired. The *Edit Student Assignment Exemptions* page appears. **Note:** *The curriculum will be listed with all its associated courses and equivalents. There are icons to help you know which items are courses, which are equivalents, and which are curriculums. Any items the student has completed will appear with the status Complete and their completion date in the date column. You cannot exempt a student from an item they have already completed.*
- Select the check box to the left of the curriculum to exempt the entire curriculum.
- In the **Exemption Date** box, enter the exemption date.
- Enter an optional exemption comment. Exemption comments are displayed on the *Assignments* page under each student profile.
- Click **Save**.

#### ★ Tips

- You can click [  ] to select the date.

## EDITING AN EXEMPTION BY STUDENT

### ➔ To edit an exemption by student:

1. Perform a student search.
2. Click the name link of the desired student. The *Manage a Student* page appears.
3. Click **Assignments** from the left-hand navigation tree. The *Student Assignments* page appears. Follow the instructions below to edit a course exemption, an equivalent exemption, a learning item within a curriculum exemption, and an entire curriculum exemption.

You can now edit a course exemption, an equivalent exemption, a learning item exemption from a curriculum, or a curriculum exemption.

### EDITING A COURSE EXEMPTION

1. Click **Exempt** to the right of the course associated with the specific assignment instance for which an exemption is desired. The *Edit Student Assignment Exemptions* page appears. Items that have already been exempted will have a check in the check box.
2. Do one of the following:
  - Clear the check box to the left of the course if you wish to delete an exemption.
  - Change the date in the date box if you wish to change the exemption date.
3. Enter an optional exemption comment. Exemption comments are displayed on the *Assignments* page under each student profile.
4. Click **Save**.

### EDITING AN EQUIVALENT EXEMPTION

**Note:** *If an exemption is removed, the student will return to the pre-exemption assignment status for the equivalent.*

1. Click **Exempt** to the right of the equivalent associated with the specific assignment instance for which you want to edit an exemption. The *Edit Student Assignment Exemptions* page appears. Items that have already been exempted will have a check in the check box.
2. Do one of the following:
  - Clear the check box to the left of the course if you wish to delete an exemption.
  - Change the date in the date box if you wish to change the exemption date. **Note:** *If you wish to change a student's exemption date, you must delete the original exemption and then add the student and enter the new exemption date.*

3. Enter an optional exemption comment. Exemption comments are displayed on the *Assignments* page under each student profile.
4. Click **Save**.

#### **EDITING AN EXEMPTION BY STUDENT FOR A LEARNING ITEM IN A CURRICULUM**

1. Click **Exempt** to the right of the curriculum associated with the specific assignment instance for which an exemption is desired. The *Edit Student Assignment Exemptions* page appears. Items that have been exempted will have a check in the check box. **Note:** *The curriculum will be listed with all its associated courses and equivalents. There are icons to help you know which items are courses, which are equivalents and which are curriculums. Any items the student has completed will appear with the status Complete and their completion date in the date column. You cannot exempt a student from an item they have already completed.*
2. Do one of the following:
  - Clear the check box to the left of the course if you wish to delete an exemption.
  - Change the date in the date box if you wish to change the exemption date.
3. Enter an optional exemption comment. Exemption comments are displayed on the *Assignments* page under each student profile.
4. Click **Save**.

#### **EDITING AN EXEMPTION BY STUDENT FOR AN ENTIRE CURRICULUM**

1. Click **Exempt** to the right of the curriculum associated with the specific assignment instance for which an exemption is desired. The *Edit Student Assignment Exemptions* page appears. Items that have been exempted will have a check in the check box. **Note:** *The curriculum will be listed with all its associated courses and equivalents. There are icons to help you know which items are courses, which are equivalents and which are curriculums. Any items the student has completed will appear with the status Complete and their completion date in the date column. You cannot exempt a student from an item they have already completed.*
2. Do one of the following:
  - Clear the check box to the left of the curriculum to delete the curriculum exemption.
  - Change the date in the date box if you wish to save the exemption date.
3. Enter an optional exemption comment. Exemption comments are displayed on the *Assignments* page under each student profile.
4. Click **Save**.

## **CREATING AN EXEMPTION BY COURSE, EQUIVALENT, OR CURRICULUM**

➤ **To create an exemption by course, equivalent, or curriculum:**

1. Perform a group assignment search.
2. Click the name link of the desired group assignment. The *Edit Group Assignment* page appears.
3. Click **Exemptions** to the right of the course, equivalent, or curriculum for which you wish to create exemptions. The *Search Assignment Exemptions* page appears, and displays the assignment name, assignment creator name, course/equivalent/curriculum name and exemption search criteria (date range list and alphabetical search). In addition, a list of previously exempted students appears.
4. Click **Add Student(s)**. The *Select Students to Exempt* page appears.
5. Perform a student search using basic criteria or advanced search criteria by clicking the **Advanced Search** link. Only students who received the assignment will be returned in the student search.
6. Select the check box to the left of the desired students' names, or click **Check All Current Search Results**.
7. Click **Continue**. A list of selected students appears.
8. Confirm the exemption by selecting the check box to the left of each student's name, or by selecting the **Select All** check box to select all students. **Note:** *It is possible for a course to appear in the curriculum as well as within one or more equivalents in the same curriculum. When an exemption is made to the course, it is not associated to any other instances of the course in any equivalents within in the curriculum. There may be more than one instance of the course listed (if the course is part of a recurring assignment). You can exempt students from both the current and previous assignment instances if desired. Equivalents and curricula will only appear in one-time assignments.*
9. In the **Exemption Date** box, enter a new exemption date. The exemption date defaults to today's date, but can be changed for each student.
10. Enter an optional exemption comment to the right of each student's exemption date. Exemption comments are displayed on the *Assignments* page under each student profile.
11. Click **Save**.

★ **Tips**

- You can click [  ] to select the date.

## **EDITING AN EXEMPTION BY COURSE, EQUIVALENT, OR CURRICULUM**

➤ **To edit an exemption by course, equivalent, or curriculum:**

**Note:** If you wish to change a student's exemption date, you must delete the original exemption and then add the student and enter the new exemption date.

1. Perform a group assignment search. .
2. Click the name link of the desired group assignment. The *Edit Group Assignment* page appears.
3. Click **Exemptions** to the right of the course, equivalent, or curriculum for which you wish to edit exemptions. The *Search Assignment Exemptions* page appears, and displays the assignment name, assignment creator name, course/equivalent/curriculum name and exemption search criteria (date range list and alphabetical search). In addition, a list of previously exempted students appears.
4. Do one of the following:
  - Click **Add Students** if you wish to exempt additional students.
  - Clear the check box to the left of students' names if you wish to remove the exemption. **Note:** *If an exemption is removed, the student will return to the pre-exemption assignment status.*
5. Enter an optional exemption comment. Exemption comments are displayed on the *Assignments* page under each student profile.
6. Click Save.

## CREATING AN EXEMPTION BY ASSIGNMENT

Exemptions can be created for multiple students and multiple courses, equivalents, or curricula in a single assignment.

### To create an exemption by assignment:

1. Perform a group assignment search.
2. Click the name link of the desired group assignment. The *Edit Group Assignment* page appears.
3. Click **Assignment-Wide Exemptions**. The *Search Assignment Exemptions* page appears, and displays the assignment name, assignment creator name, course/equivalent/curriculum name and exemption search criteria (date range list and alphabetical search). In addition, a list of previously exempted students appears.
4. Click **Add Student(s)**. The *Select Students to Exempt* page appears.
5. Perform a student search using basic criteria or advanced search criteria by clicking the **Advanced Search** link. **Note:** *Only students who received the assignment will be returned in the student search.*
6. Select the check box to the left of the desired students' names, or click **Check All Current Search Results**.
7. Click **Continue**. A list of selected students appears.

8. Enter or select a single default date and click **Add to Blank Fields** to make this date the exemption date for all selected students, or enter a specific exemption date for each student in the **Exemption Date** box to the right of each student's name.
9. Enter an optional default exemption comment and click **Add to Blank Fields** to display this comment to all selected students, or enter a specific exemption comment for each student in the **Exemption Comment** box to the right of each student's exemption date.
10. Click **Save**. The selected students will be exempted from all courses, equivalents, and curricula within the assignment.

If you wish to un-exempt students from one or more of the learning items, clear the Exempt? check box to the left of the student's name for the learning items you wish to remain assigned and click Save.

### ★ Tips

- You can click [  ] to select the date.
- An assignment-wide exemption will not replace any existing course-, equivalent-, or curriculum-level exemption dates or comments. Existing exemptions remain intact

## EDITING AN EXEMPTION BY ASSIGNMENT

Exemptions can be edited for multiple students and multiple courses, equivalents, or curricula in a single assignment.

### ➡ To edit an exemption by assignment:

**Note:** If you wish to change a student's exemption date, you must delete the original exemption and then add the student and enter the new exemption date.

1. Perform a group assignment search.
2. Click the name link of the desired group assignment. The *Edit Group Assignment* page appears.
3. Click **Assignment-Wide Exemptions**. The *Search Assignment Exemptions* page appears, and displays the assignment name, assignment creator name, course/equivalent/curriculum names and exemption search criteria (date range list and alphabetical search). In addition, a list of previously exempted students appears.
4. Do one of the following:
  - Click **Add Students** if you wish to exempt additional students.
  - Clear the check box to the left of students' names if you wish to remove the exemption for one or more courses, equivalents, or curricula.
5. Enter an optional exemption comment. Exemption comments are displayed on the *Assignments* page under each student profile.
6. Click **Save**.

## SEARCHING FOR EXEMPTED STUDENTS

### To search for exempted students:

1. Perform a group assignment search.
2. Click the name link of the group assignment that you want to delete. The *Edit Group Assignment* page appears.
3. Click **Assignment-Wide Exemptions**. The **Search Assignment Exemptions** page appears, and displays the assignment name, assignment creator name, course name and exemption search criteria (date range list and alphabetical search). In addition, a list of previously exempted students appears.
4. In the **Exemption Date Range** box, select the date range for the exemption. Choices are All Exemptions or Last 12 Months.
5. Narrow your search by using alphabetical search (searches by last name). The page automatically refreshes once search criteria are determined to display search return of exempted students.

## GROUP ASSIGNMENTS

Group assignments enable you to assign items to student groups.

Group assignments enable you to assign items to student groups.

## ADDING A GROUP ASSIGNMENT

### To add a group assignment:

1. On the **Education** tab, click **Add a Group Assignment**. The *Add a Group Assignment* page appears.
2. In the **Name** box, enter the group assignment name.
3. In the **Description** box, enter a description of the group assignment, if desired. The assignment description will appear on the Assigned Courses report.
4. Select the **Hide the Assignment from Search Results** check box if you do not want the assignment to appear in search results. This only applies to searches for which the *Visible* option has been selected. Searches for which the *Hidden* or *Both* option is selected will return the assignment, whether this check box is selected or not.
5. Select items to assign.
  - 5.1. From the **Courses, Simulation Events, Curricula, or Equivalents** box, click **Select** to open a search page.

- 5.2. Enter search criteria and click the search button.
- 5.3. From the search results list, select the check box next to the items you want to add.
- 5.4. Click the **Select** button to add the items and return to the assignment editor page.
6. Specify the student groups that will receive the assignment. You can add as many groups as needed: there is no limit.
  - Click the **Search Student Groups** to add existing student groups.
  - Click **Add New Student Group** to create a new student group to receive the assignment.
7. In the **Effective Date** box, change the effective date, if desired. The effective date is the date on which the assignment begins, and the date from which the system begins looking for completions of the assigned learning items. The effective date defaults to today's date, but can be back-dated to accept prior completions to satisfy the assignment. **Note:** Each learning item within a curriculum includes an effective date that can be set to X number of days prior to enrollment in the course or equivalent within the curriculum (the relative effective date). Enrollment occurs when a student clicks the **Enroll** button for a course, equivalent, or equivalent course within the curriculum. Additionally, each learning item can be set to allow the assignment effective date (the fixed effective date) to serve as the effective date for the learning item. If the assignment effective date option is used, the relative effective date (if added) will only apply if the curriculum is chosen as elective learning from the student **Catalog** tab.
8. In the **Start Date** box, change the start date, if desired. The start date is the date on which assigned items will appear to students. The start date defaults to tomorrow's date but can be changed to today's date or a date in the future. The start date can be set in the past, as long as it is set to on or after the effective date.
9. In the **End Date** box, enter an end date, if desired. Once an assignment end date arrives, the assigned items cannot be completed to satisfy the assignment and the student is marked as *Delinquent* on assignment-related reports. Items that have not been started will be removed from the student's view entirely. In-progress items will become elective learning: students can complete it at their convenience (elective learning does not have a due date) or unenroll from it.
10. If you do not want the assignment to be automatically reassigned on failure, clear the **Automatically reassign course if student fails** check box. You can only edit this option for single- and multiple-course assignments: if the assignment contains curricula or equivalents, you cannot change this setting.
11. Click **One-Time Assignment** or **Recurring Assignment** to indicate the assignment type. Curricula and equivalents can be included in one-time assignments only. If you select recurring assignment, the page will refresh and additional recurring assignment options are displayed.
  - Select a recurrence interval by entering a numeric value and selecting the desired interval from the list (for example, recurs every 2 years).
  - If you select **Recurring Assignment** based on Original Due Date, then you may enter add an optional grace period (in days) in the **Grace Period** box, if desired.

- The recurrence date defaults to 180 days but can be changed if desired. The recurrence date is the date on which the next assignment instance will appear on a student's *My Learning* page.

12. In the **Due Date** box, enter date on which the assignment is due. The due date can be either a fixed calendar date, or can be set to a date relative to each assigned student's hire/re-hire or review date.

13. Click **Save**.

When you click **Save**, the system will begin processing the assignment and associated student groups in the background. You can leave the page or close your browser without affecting the process. If you remain on the page, you can check the processing progress by clicking the **Refresh** button to update the percent complete display.

### **ASSIGNMENTS, ACTIVE DATES, AND DUE DATES**

By default, a student's hire/re-hire date and the active date are the same. This can change if, for example, the student changes departments. In such a case, the active date might be changed to the date when the transfer took effect. If you select the *Hire/Active Date* option when setting a relative due date, the system will base the assignment's due date on either the hire/re-hire date or the active date, whichever is greater.

### **RECURRING ASSIGNMENT OPTIONS**

When creating recurring assignments, there are two recurrence options to determine how you want the system to calculate the assignment's recurring due dates:

- **Original Due Date** – Select this option to set the recurring due date to the value you select in the assignment builder **Due Date** section. It can be a fixed date, in which case the assignment will always be due on the same date for all students, or a relative date based on the hire/active, review, or birth date. If you select the *Hire/Active Date* option, the system will base the assignment's due date for each student on either his or her hire/re-hire date or active date, whichever is greater.

- **Previous Completion Date**—Select this option to calculate the assignment's recurring due date based on each student's last completion date. If a student has no previous completions for the assignment, or if a student's last assignment is in a delinquent state and the assignment's initial due date is based on hire/active date, then the system will base the assignment's initial due date on either the hire/re-hire date or the active date, whichever is greater. Subsequent due dates will be based on the previous completion date.

#### ★ **Tips**

- Assignments can be made visible or hidden at any time. You may wish to hide assignments that are no longer active as a way of removing them from routine group assignment search. The default group assignment search selection is visible, however hidden assignments can also be searched, and assignments can be changed from visible to hidden at any time.

- You can click [  ] to select the date.

## **SEARCHING FOR A GROUP ASSIGNMENT**

➔ **To search for a group assignment:**

1. On the **Education** tab, click **Manage Group Assignments**. The *Select Group Assignments* page appears.

2. Enter search criteria. The more search criteria that are added, the narrower the search return will be.
  - If you want your search to return only group assignments with no end date, select the **No End Date** check box in the **End Date Range** section of the page.
3. Click **Search**. A listing of all group assignments matching the search criteria will appear at the bottom of the page.

## EDITING A GROUP ASSIGNMENT

Carefully plan group assignment edits with consideration of how edits may affect reports and student assignments.

### To edit a group assignment:

1. Perform a group assignment search.
2. Click the name link of the desired group assignment. The *Edit Group Assignment* page appears.
3. Make the desired edits, keeping the following in mind:
  - If you add a new course, equivalent, or curriculum to the group assignment, the new course, equivalent, or curriculum will be visible to students.
  - If you remove an item from a group assignment, it will be removed from the student's view entirely. In-progress items will become elective learning: students can complete it at their convenience (elective learning does not have a due date) or unenroll from it..
  - Adding student groups will assign all items in the assignment to those student groups.
  - If you remove an assigned student group from the group assignment, items that have not been started will be removed entirely for students in that group. In-progress items will become elective learning: students can complete it at their convenience (elective learning does not have a due date) or unenroll from it.
4. Click **Save**.

## COPYING A GROUP ASSIGNMENT

At times, you may wish to copy a group assignment. This will allow you to make edits, while preserving original assignment data. This feature can also be used to as a short-cut for replicating prior assignments, for instance when you wish to assign a modified version to another student group. You may also wish to copy an assignment if you need to edit assignment timing (which is not editable once the original assignment start date arrives).

If you copy an assignment that has exemptions, they will NOT be copied to the new assignment.

### To copy a group assignment:

1. Perform a group assignment search.
2. Click the name link of the group assignment that you want to edit. The *Edit Group Assignment* page appears.
3. Click **Copy** to create a copy of the original assignment. The copy will be named *Copy of [original assignment name]*.
4. Make desired edits to assignment copy.
5. Click **Save**.

If the copy was created to replace an existing group assignment, consider:

- Clicking **Delete** only if you know students have not yet completed any of the assigned items, or if you do not need to preserve assignment completion report data.
- Adding an End Date (today's date) to end the original assignment, but preserve all assignment-related completion data for reports

#### ★ Tips

- You can click [  ] to select the date.

## DELETING A GROUP ASSIGNMENT

Deleting a group assignment removes assignment-related completion data for reports. Only delete an assignment if you know students have not yet completed any of the assigned items, or if you do not need to preserve assignment completion report data.

### 🔄 To delete a group assignment

1. Perform a group assignment search.
2. Click the name link of the group assignment that you want to delete. The *Edit Group Assignment* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK**.

## INDIVIDUAL ASSIGNMENTS

### INDIVIDUAL ASSIGNMENTS OVERVIEW

Individual assignments allow delivery of one or more assigned courses, equivalents, or curricula to a specific student.

### INDIVIDUAL ASSIGNMENTS OVERVIEW

Individual assignments allow delivery of one or more assigned courses, equivalents, or curricula to a specific student.

## ADDING AN INDIVIDUAL ASSIGNMENT

### To add an individual assignment:

1. From the **Education** tab, click **Add an Individual Assignment** to open the *Select Student* page.
2. Search for the person who will receive the assignment.
3. From the search results list, click the recipient's name to open the *Add a Student Assignment* page.
4. In the **Name** box, enter a name for the individual assignment.
5. In the **Description** box, enter a description of the assignment, if desired. The assignment description will appear on the Assigned Courses report.
6. Select items to assign. If you add an assessment to the assignment, you cannot add courses, curricula, or equivalents. If you add courses, curricula, or equivalents, you cannot add assessments.
  - 6.1. From the **Courses, Curricula, or Equivalents** box, click **Select** to open a search page.
  - 6.2. Enter search criteria and click the search button.
  - 6.3. From the search results list, select the check box next to the items you want to add.
  - 6.4. Click the **Select** button to add the items and return to the assignment editor page.
7. Clear the check box to the left of the course, equivalent, or curriculum name to remove a course, equivalent, or curriculum that you previously selected, if desired.
8. In the **Effective Date** box, change the effective date, if desired. The effective date is the date on which the assignment begins, and the date from which the system begins looking for completions of the assigned learning items. The effective date defaults to today's date, but can be back-dated to accept prior completions to satisfy the assignment. **Note:** *Each learning item within a curriculum includes an effective date that can be set to X number of days prior to enrollment in the course or equivalent within the curriculum (relative effective date). Enrollment occurs when a student clicks the **Enroll** button for a course, equivalent, or equivalent course within the curriculum. Additionally, each learning item can be set to allow the assignment effective date (fixed effective date) to serve as the effective date for the learning item. If the assignment effective date option is used, the relative effective date (if added) will only apply if the curriculum is chosen as elective learning from the student Catalog tab.*
9. In the **Start Date** box, change the start date, if desired. The start date is the date on which assigned items will appear to students. The start date defaults to tomorrow's date but can be changed to today's date or a date in the future. It cannot be set to a date in the past.
10. In the **End Date** box, enter an end date, if desired. Once an assignment end date arrives, the assigned items cannot be completed to satisfy the assignment and students are marked as Delinquent on assignment-related reports. Items that have not been started will be removed from the student's view entirely. In-progress

items will become elective learning: students can complete it at their convenience (elective learning does not have a due date) or unenroll from it.

11. If you do not want the assignment to be automatically reassigned on failure, clear the **Automatically reassign course if student fails** check box. You can only edit this option for single- and multiple-course assignments: if the assignment contains curricula or equivalents, you cannot change this setting.
12. Click **One-Time Assignment** or **Recurring Assignment** to indicate the assignment type. Equivalents and curricula can be included in one-time assignments only. If you select **Recurring Assignment**, the page will refresh and additional recurring assignment options are displayed.
  - Select a recurrence interval by entering a numeric value and selecting the desired interval from the list (for example, recurs every 2 years).
  - If you select **Recurring Assignment** based on Original Due Date, then you may enter add an optional grace period (in days) in the Grace Period box, if desired.
  - The recurrence date defaults to 180 days but can be changed if desired. The recurrence date is the date on which the next assignment instance will appear on a student's *My Learning* page.
13. In the **Due Date** box, enter date on which the assignment is due. The due date can be either a fixed calendar date, or can be set to a date relative to each assigned student's hire/re-hire or review date.
14. Click **Save**.

### **ASSIGNMENTS, ACTIVE DATES, AND DUE DATES**

By default, a student's hire/re-hire date and the active date are the same. This can change if, for example, the student changes departments. In such a case, the active date might be changed to the date when the transfer took effect. If you select the *Hire/Active Date* option when setting a relative due date, the system will base the assignment's due date on either the hire/re-hire date or the active date, whichever is greater.

### **RECURRING ASSIGNMENT OPTIONS**

When creating recurring assignments, there are two recurrence options to determine how you want the system to calculate the assignment's recurring due dates:

- **Original Due Date** – Select this option to set the recurring due date to the value you select in the assignment builder **Due Date** section. It can be a fixed date, in which case the assignment will always be due on the same date for all students, or a relative date based on the hire/active, review, or birth date. If you select the *Hire/Active Date* option, the system will base the assignment's due date for each student on either his or her hire/re-hire date or active date, whichever is greater.
- **Previous Completion Date**—Select this option to calculate the assignment's recurring due date based on each student's last completion date. If a student has no previous completions for the assignment, or if a student's last assignment is in a delinquent state and the assignment's initial due date is based on hire/active date, then the system

will base the assignment's initial due date on either the hire/re-hire date or the active date, whichever is greater. Subsequent due dates will be based on the previous completion date.

### ★ Tips

- Assignments can be made visible or hidden at any time. You may wish to hide assignments that are no longer active as a way of removing them from routine group assignment search. The default group assignment search selection is visible, however hidden assignments can also be searched, and assignments can be changed from visible to hidden at any time.

- You can click [  ] to select the date.

## EDITING AN INDIVIDUAL ASSIGNMENT

Carefully plan individual assignment edits with consideration of how edits may affect reports, assignments, or completions.

### 🔄 To edit an individual assignment:

**Note:** *Assignment Timing (other than the End Date) and Assignment Type cannot be edited once the assignment start date has arrived.*

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Search for the person whose assignment you want to delete.
3. From the search results, click a name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **Assignments** link to open the *View Student Assignments* page.
5. Click the name link of the desired individual assignment. The *Edit Student Assignment* page appears.
6. Make the desired edits, keeping the following in mind:
  - If you add a new course, equivalent, or curriculum to the individual assignment, the new course, equivalent, or curriculum will appear on the student's *My Learning* page.
  - If you remove an item from the assignment, it will be removed from the student's view entirely if he or she has not yet started it. In-progress items will become elective learning: the student can complete it at his or her convenience (elective learning does not have a due date) or unenroll from it.
7. Click **Save**.

## COPYING AN INDIVIDUAL ASSIGNMENT

At times, you may wish to copy an individual assignment. This will allow you to make edits, while preserving original assignment data. This feature can also be used as a shortcut for replicating prior assignments. You may also wish to copy an assignment if you need to edit assignment timing (which is not editable once the original assignment start date arrives).

If you copy an assignment that has exemptions, they will NOT be copied to the new assignment.

### ➡ To copy an individual assignment:

1. From the People tab, click the Manage Students link to open the Manage Students page.
2. Search for the person whose assignment you want to delete.
3. From the search results, click a name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **Assignments** link to open the *View Student Assignments* page.
5. Click the name link of the individual assignment that you want to edit. The *Edit Student Assignment* page appears.
6. Click **Copy** to create a copy of the original assignment. The copy will be named *Copy of* [original assignment name].
7. Make desired edits to assignment copy.
8. Click **Save**.

If the copy was created to replace an existing individual assignment, consider:

- Clicking **Delete** only if you know the student has not yet completed any of the assigned items, or if you do not need to preserve assignment completion report data.
- Adding an end date (today's date) to end the original assignment, but preserve all assignment-related completion data for reports.

### ★ Tips

- You can also click [  ] to select the date.

## DELETING AN INDIVIDUAL ASSIGNMENT

Deleting an individual assignment removes assignment-related completion data for reports. Only delete an assignment if you know the student has not yet completed any of the assigned items, or if you do not need to preserve assignment completion report data.

### ➡ To delete an individual assignment

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Search for the person whose assignment you want to delete.
3. From the search results, click a name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **Assignments** link to open the *View Student Assignments* page.

5. Click an assignment name link to open the *Edit Student Assignment* page.
6. Click the **Delete** button at the bottom of the page.
7. When prompted to confirm the deletion, click **OK**.

## CERTIFICATION-BASED ASSIGNMENTS

### CERTIFICATION-BASED ASSIGNMENTS

Certification-based assignments are used for student certification maintenance. They are recurring group assignments whose recurrence period is based on the certification period of a particular professional certification. Unlike normal recurring assignments, certification-based assignments can include a curriculum or an equivalent.

Certification-based assignments are made to certification-based student groups: profile student groups whose members hold the same certification issued by the same certifying body. Only students who have their certification information (certifying body, certification, AND expiration date) entered into the system can receive certification-based assignments. Students can manage their own certification information through the Certification Management feature. Administrators can manage a student's certification information from the *Manage a Student* page. Certification information can also be managed through a data import file.

When a student receives a certification-based assignment, the system calculates the due date based on the certification's expiration date. The due date for subsequent instances will be based on the assignment's previous completion date. The length of time between assignments is the same as the certification period: for example, the American Heart Association's Basic Life Support (BLS) certification is valid for two years, so students would receive an assignment based on the BLS certification every two years.

The Certification-Based Assignment feature does not support all professional certifications. See Supported Certifications for a list of certifications that can be used with this feature. Some supported certifications can also be system managed. This means that when students successfully complete a course that has been mapped to a certification, the system will automatically update the certification expiration date (see [System Managed Certifications](#) for more information about system managed certifications). The *Supported Certifications* page (see the link earlier in this paragraph) lists the courses mapped to certifications.

## CREATING A CERTIFICATION-BASED ASSIGNMENT

[View Show Me How](#)

Before you can create a certification-based assignment, there must be a student group in the system that is based on the same certification as the assignment. (See *Creating Certification-Based Student Groups*.) The Certification-Based Assignment feature does not support all professional certifications. See [Supported Certifications](#) for a list of certifications that can be used with this feature.

The assignment will begin either on the current date or the next day, depending on your organization's *Default Assignment Start Date* setting.

See [Timing Considerations](#) to learn more about how the timing fields can affect assignment delivery.

 **To create a certification-based assignment:**

1. From the **Education** tab, click the **Add a Certification Based Assignment** link to open the *Add a Certification Based Assignment* form.

- Required fields are indicated by an asterisk (\*).
2. Type a name for the assignment in the **Name** box.
  3. If needed, type a description in the **Description** box.
    - Assignment names and descriptions do not appear on students' *My Learning* page.
  4. If you do not want the assignment to appear in routine search results, select the **Hide this Assignment from search results** check box.
  5. Select a certifying body from the **Select a Certifying Body** list to reveal the certification list.
  6. Select a certification from the **Select a Certification** list.
  7. Click the **Select** link next to the **Courses or Curricula or Equivalent**s to open the *Browse* page.
  8. Search for a course, equivalent, or curriculum to assign. You can search by keyword, by category, or alphabetically.
    - You can only assign **one** item: one course, one curriculum, or one equivalent.
    - If you add a curriculum, then the certification-earning course should be the last course in the curriculum.
    - Curricula are recommended if a certification requires successful completion of more than one course. The completion of the entire curriculum determines the next assignment due date. Certification business rules, such as end of month grace periods, are applied to the next assignment as well.
    - If you want students' certifications to be managed by the system, be sure that you assign a course that is mapped to the certification for which you are creating the assignment. See [Supported Certifications](#) for a list of courses that are mapped to certifications.
  9. Click the **Search Student Groups** link to open the *Search Student Groups* page.
    - All student groups based on the same certification as the assignment (and **only** the student groups based on that certification) are listed at the bottom of the page.
    - If no student groups are listed, then there are no student groups in the system that are based on the same certification as the assignment.
  10. Select the check box next to the student group(s) that you want to receive the assignment
  11. Click **Select** to select the student group(s) and return to the *Add a Certification Based Assignment* form.
  12. Changing the default effective date is not generally recommended. However, if you want to give credit for completions in the current calendar month for certifications expiring at the end of the month, then it would

be advisable to make the effective date the first day of the current calendar month. If your organization or institution has specific policies that dictate the acceptable assignment window for all students, such as 90 days, then it may be necessary to extend the effective date to the beginning of the month that includes this 90-day window in order to capture relevant completions for the first assignment.

13. Enter an end date in the **End Date** box if needed.

- Once an assignment end date arrives, the assigned courses, equivalents, or curricula cannot be completed to satisfy the assignment and student is marked as Delinquent on assignment-related reports. Items that have not been started will be removed from students' view entirely. In-progress items will become elective learning: students can complete it at their convenience (elective learning does not have a due date) or unenroll from it.

14. If you do not want the assignment to be automatically reassigned on failure, clear the **Automatically reassign course if student fails** check box.

- You can only edit this option for single-course assignments: if the assignment contains a curriculum or an equivalent, you cannot change this setting.

15. In the **Available Date** box, specify when the assignment should become visible to students.

16. In the **Due Date** box, specify when the assignment is due, relative to the certification expiration date.

- Certification based assignments are recurring assignments. The first time a student receives the assignment, the due date is calculated relative to the certification expiration date. Subsequent assignment due dates are calculated relative to the previous completion date.

17. Click the **Save** button.

## SUPPORTED CERTIFICATIONS

The Certification-Based Assignment feature supports the following certifications:

Certifying Body	Certification	Mapped Course(s)
American Heart Association	HeartCode ACLS	<ul style="list-style-type: none"> <li>• HeartCode ACLS - G2010 Parts 2 and 3 v5.0.8.11 (evaluation version)</li> <li>• HeartCode ACLS - G2010 Parts 2 and 3 v5.0.8.11 (non-evaluation version)</li> </ul>

American Heart Association	HeartCode BLS	<ul style="list-style-type: none"> <li>HeartCode BLS Parts 2 and 3 - G2010 v5.0.8.11 (evaluation version)</li> <li>HeartCode BLS Parts 2 and 3 G2010 v5.0.8.11 (non-evaluation version)</li> </ul>
American Heart Association	HeartCode PALS	HeartCode PALS

## TIMING CONSIDERATIONS

### DUE DATE OF THE FIRST ASSIGNMENT INSTANCE

It is important to remember that the due date of the first instance of a certification-based assignment is based on the certification expiration date. When you create a certification-based assignment, the system examines the certification expiration date of each student in the group that is receiving the assignment. Then the system subtracts the number of days that you entered in the **Due Date** box to determine the due date for the first instance of the assignment. This is generally straightforward, but there is a case in which the calculated due date may not be as expected: students with certifications that are *about to expire*.

Consider an assignment that was created on June 15, with an effective date of June 1, and a Due Date of 30 days before the certification expiration date. Now imagine a student whose certification expires on June 20. The system will calculate a due date of May 21 (30 days before June 20), but this would make the due date prior to the effective date, which is not allowed. The system will adjust the due date to one day after the assignment effective date.

### STUDENTS WITH EXPIRED CERTIFICATIONS

Students whose certification is already expired when you create the assignment will receive the assignment, but it will immediately be past due.

### RENEWAL OF CERTIFICATION DOES NOT NECESSARILY EQUAL COMPLETION OF ASSIGNMENT

It is possible to have a curriculum whose final course (or a course whose final learning activity) is not the course (or learning activity) that earns the certification on which the assignment is based. For example, the evaluation version of HeartCode courses contains an evaluation as its final learning activity, which comes after the skills check (the skills check is what earns the certification). The certification-based assignment uses the *completion date* to calculate the next due date, not the new certification date (the certification expiration date is only used to calculate the *first* assignment instance due date). To avoid assignment due dates getting out of sync with certification expiration dates, students should be sure that their assignment completion date is as close as possible to the date on which they earned their certification.

### ESTABLISH A POLICY ABOUT ASSIGNMENT TIMING DATES

It is recommended that you establish a policy regarding effective date (how far back you want the assignment to look for course completions) and available date (how long you want to give students to complete the assignment).

## HEARTCODE CONSIDERATIONS

- Mapped courses can only be used for completions using the voice-assisted manikins or the HeartCode Instructor Organization.
- For completion using the HeartCode Instructor Organization, students must log off from the system before the instructor enters their grade.
- AHA certifications expire at the end of the month, regardless of which day the certification was earned. The system takes this into account when calculating due dates.
- The recommended practice for certification-based assignments using HeartCode Parts 1, 2 and 3 is to assign the courses as a curriculum.

# Buildings and Resources

## BUILDINGS AND RESOURCES OVERVIEW

From the building and resource management functions on the **Tools** tab, administrators can:

- Add and Manage Resource Types (enterprise level function).
- Add a Building.
- Manage Buildings and Resources.

## BUILDING RESOURCE TYPES

### ADDING A BUILDING RESOURCE TYPE

Resource Types are broad categories used to organize resources that may be used for classroom activities. The following are examples of resource types:

- Rooms
- AV Equipment
- Skills Lab Equipment
- CPR/ACLS Training Equipment
- Simulation Equipment
- Computer Equipment

Adding a building resource type is an enterprise level function by default, but can be enabled at the institution level.

#### To add a building resource type:

1. On the **Tools** tab, click **Add a Building Resource Type**. The *Add a Building Resource Type* page appears.
2. In the **Name** box, enter the resource type name.
3. Select all **Resource Classification** options that apply.
4. Leave the **Allow this Resource Type to be used in the system (Active)** check box selected if you want to make the resource type available for use.
5. Click **Save** if you are only adding one resource type, or click **Save and Add Another** if you wish to add more resource types.

### EDITING A BUILDING RESOURCE TYPE

Building resource types can be edited at any time. Once saved, edits will appear wherever the resource type is displayed in the system.

 **To edit a building resource type:**

1. Search for the building resource type that you want to edit.
2. From the search results, click the name of the desired resource type. The *Manage a Building Resource Type* page appears.
3. Edit the name of the building resource type.
4. Click **Save** to save the edits or **Save and Add Another** to save the edits and immediately add a new building resource type.

## DELETING A BUILDING RESOURCE TYPE

*You cannot delete building resource types that are in use (have specific rooms or resources associated with the resource type).*

 **To delete a building resource type:**

1. Search for the building resource type that you want to delete.
2. From the search results, click the name of the desired resource type. The *Manage a Building Resource Type* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the resource type.

## SEARCHING FOR A BUILDING RESOURCE TYPE

 **To search for a building resource type:**

On the **Tools** tab, click **Manage Building Resource Types**. The *Search Building Resource Types* page appears, which contains a listing of available resource types including the date of last update, and updated by information.

## BUILDINGS

### ADDING A BUILDING

 **To add a building:**

1. On the **Tools** tab, click **Add a Building**. The *Add a Building* page appears.
2. In the **Name** box, enter the building name.

3. In the **Map URL** text area, you can add a map URL. Locate the map URL by searching for the building using an Internet map searching tool, and copy and paste the Web address into the **Map URL** text area. This feature provides students with a link to the Internet map when they view building information.
4. In the **Address** boxes, enter the building address.
5. In the **City** box, enter the name of the city in which the building is located.
6. In the **State/Province** and **Country** lists, select the state or province and the country in which the building is located.
7. In the **Zip Code** and **Zip Code Ext** boxes, enter the zip code and zip code extension for the location of the building.
8. In the **Phone**, **Phone Ext**, and **Fax** boxes, enter the contact numbers.
9. Click **Save** or click **Save and Add Another** if you wish to add another building. Once a building is saved, the **Add Resource** link appears in the upper right-hand corner of the page. You may add building resources now or at a later time.

## SEARCHING FOR A BUILDING

### To search for a building:

1. On the **Tools** tab, click **Manage Buildings and Resources**. The *Search Buildings/Resources* page appears.
2. Enter search criteria. If desired, you can limit the search to the institution to which you are logged in by selecting the **Search This Institution Only** check box.
3. Click **Search**. All buildings meeting the entered search criteria appear at the bottom of the page, including the building name, associated institution, the date the building was last updated, and by whom it was updated.

## EDITING A BUILDING

### To edit a building:

1. Search for the building that you want to edit.
2. From the search results, click the name of the desired building. The *View Building* page appears.
3. Click **Edit Building**. The *Manage a Building* page appears.
4. Make desired changes.
5. Click **Save** or **Save and Add Another** if you wish to add another building.

## DELETING A BUILDING

If a building has associated rooms or resources, the building cannot be deleted.

### To delete a building:

1. Search for the building that you want to delete.
2. From the search results, click the name of the desired building. The *View Building* page appears.
3. Click **Edit Building**. The *Manage a Building* page appears.
4. Click **Delete**. A confirmation prompt appears.
5. Click **OK** to delete the building.

## BUILDING RESOURCES

### ADDING A BUILDING RESOURCE

#### To add a building resource:

1. From the **Tools** tab, click the **Manage Buildings and Resources** link to open the *Search Buildings/Resources* page.
2. Search for the building to which you need to add a resource.
3. From the search results, click a building name to open the *View Building* page.
4. Click the **Add Resource** link to open the *Add a Resource to a Building* form.
5. Complete the form.
  - An asterisk (\*) indicates a required field.
  - Click the Calendar Color tool to select a color that will represent the resource when it appears on the calendar. Click any color within the color widget to select it.
6. Click **Save** if you are entering a single building resource, or **Save and Add Another** to continue adding resources.

#### Tips

- Click [  ] to use the Spell Check feature.

## SEARCHING FOR A BUILDING RESOURCE

### To search for a building resource:

1. Search for the building that contains the resource.
2. From the search results, click the name of the desired building. The *View Building* page appears with the associated resources listed at the bottom of the page.

### Tips

- You can search using a specific resource name as a search criterion.

## EDITING A BUILDING RESOURCE

Building resources can be edited at any time. Once saved, edits will appear wherever the resource is displayed in the system.

### To edit a building resource:

1. Search for the building resource that you want to edit.
2. Click the name of the desired building resource. The *Manage Resource within a Building* page appears.
3. Make desired edits.
4. Click **Save**.

## DELETING A BUILDING RESOURCE

*You cannot delete a resource that is associated with a classroom activity.*

### To delete a building resource:

1. Search for the building resource that you want to edit.
2. Click the name of the desired building resource. The *Manage Resource within a Building* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the resource.



# Categories

## CATEGORIES OVERVIEW

Category management allows you to catalog your courses, equivalents, and curricula to provide students and administrators with an organized approach for searching. Using the category management functionality, you can add and arrange new categories and delete unused categories. You can also create sub-categories to each category level. There is no limit to the number of categories that can be created, nor is there a limit to the number of courses, curricula, or equivalents that can be associated with a single category.

When you create a new administrator-developed course, equivalent, or curriculum, you must associate the new course, equivalent, or curriculum with at least one category. There is no limit to the number of categories that you can associate with a single course, curriculum, or equivalent. If appropriate, you can associate the course, equivalent, or curriculum to more than one category.

It is important that all administrators with access to category management follow the same procedure when adding a new category and when making category decisions.

### ➔ To view the category tree:

On the **Courses** tab, click **Manage Categories**. Category management is enabled at the enterprise level by default.

## ADDING A CATEGORY

When new categories are added, they will not be visible to students until a course, equivalent or curriculum has been associated to the new category. New categories can be marked for use at subsidiary affiliations. Newly added categories can be repositioned within the category tree by dragging and dropping the category into a new position.

### ➔ To add a category:

1. On the **Courses** tab, click **Add a Category**. The *Add a Category* page appears with the category tree on the left-hand side of the page.
2. In the **Name** box, enter the new category name.
3. Select the **Allow subsidiary institutions to use this category** check box if you wish to allow institutions to use the category being created at the enterprise level.
4. In the **Description** box, enter a description, if desired.
5. Click **Save** if you are only adding one new category or **Save and Add Another** if you wish to add more categories immediately. The new category will appear in alphabetical order within the category tree.
6. To move the new category into another position within the category tree, left-click the category name link, and drag the category into the desired position within the category tree.

## EDITING A CATEGORY

If a category is edited, the edits will appear wherever the category appears in the system.

 **To edit a category:**

1. On the **Courses** tab, click **Manage Categories**. The *Manage Categories* page appears with the category tree on the left-hand side of the page.
2. Click the name link of the category you wish to edit.
3. Make edits to category information, such as name change, allow/disallow subsidiary use, adding/editing notes, or make changes to the category tree, dragging the category to reposition it.
4. Click **Save**.

## DELETING A CATEGORY

You cannot delete a category that has associated courses, equivalents, or curricula, or has sub-categories attached.

 **To delete a category:**

1. On the **Courses** tab, click **Manage Categories**. The *Manage Categories* page appears with the category tree on the left-hand side of the page.
2. Click the category name link from the category tree. The *Manage a Category* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the category.

## CE Center

### CE CENTER

All HLC students have access to industry-sponsored continuing education (CE) courses. Your organization may have purchased CE Center Premium memberships for some students. A wide variety of additional CE courses is available for these students.

All students, regardless of whether they have a CE Center Premium membership, access CE courses from the **CE Center** tab. Students with the *CE Center Clinician* role have unlimited access to CE Center Premium courses. You can assign roles to a student from the *Manage a Student* page. See [Editing a Student Record](#) for more information.

CE Center courses can be assigned just like other courses. See [Assignments Overview](#) for more information about assignments. Students must complete the entire course to earn CE credit.

**Students' discipline and license information must be in the system and correct for them to receive CE credit for completing CE courses. See [Viewing a Student's License Information](#). This information can be entered after a student completes a CE credit course.**



# CE Credit Management

The Continuing Education (CE) Credit Management functionality associates CE credit for administrator-developed courses that have been identified as appropriate for continuing education designation of credit.

CE credit cannot be added to curricula or equivalents; it can only be added to the courses within a curriculum or equivalent.

CE credit is awarded by an organization accredited by an accrediting body or through course submission and approval by an approving body.

**It is the customer's responsibility to maintain compliance with the rules, regulations, and guidelines of the accrediting/approving bodies through which the customer provides CE.**

## **BEFORE YOU USE THE CE CREDIT MANAGEMENT FEATURES**

Before you begin utilizing the CE Credit Management features, it is recommended that you identify the person or persons within your organization who are responsible for your continuing education programs and program compliance.

- Assign the administrator role *CE Credit Manager* to those individuals.
- Require those individuals to review all CE Credit Management Help documentation, including the Show Me How modules.
- Establish ongoing communications among your CE Credit Management team, for example, regularly-scheduled meetings.
- Review all accreditation/approval guidelines to determine which features within the CE Credit Management functionality are in compliance with accrediting/approving body guidelines.

Consider removing the CE Credit Management feature access from institution and enterprise administrators who do not have responsibility for or expertise in continuing education. Note however that administrators without access to the CE Credit Management features cannot assign the CE Credit Manager role to others.

## **CE CREDIT**

The Continuing Education (CE) Credit Management functionality associates CE credit for administrator-developed courses that have been identified as appropriate for continuing education designation of credit.

CE credit cannot be added to curricula or equivalents; it can only be added to the courses within a curriculum or equivalent.

CE credit is awarded by an organization accredited by an accrediting body or through course submission and approval by an approving body.

**It is the customer's responsibility to maintain compliance with the rules, regulations, and guidelines of the accrediting/approving bodies through which the customer provides CE.**

### **BEFORE YOU USE THE CE CREDIT MANAGEMENT FEATURES**

Before you begin utilizing the CE Credit Management features, it is recommended that you identify the person or persons within your organization who are responsible for your continuing education programs and program compliance.

- Assign the administrator role *CE Credit Manager* to those individuals.
- Require those individuals to review all CE Credit Management Help documentation, including the Show Me How modules.
- Establish ongoing communications among your CE Credit Management team, for example, regularly-scheduled meetings.
- Review all accreditation/approval guidelines to determine which features within the CE Credit Management functionality are in compliance with accrediting/approving body guidelines.

Consider removing the CE Credit Management feature access from institution and enterprise administrators who do not have responsibility for or expertise in continuing education. Note however that administrators without access to the CE Credit Management features cannot assign the CE Credit Manager role to others.

## **CE CREDIT MANAGEMENT SETUP**

Each accreditation/approval you wish to utilize for administrator-developed courses must be set up in the system. Accreditations/approvals may be re-used for multiple courses. Multiple accreditations/approvals may also be attached to a single course if appropriate.

Accreditation/approval setup includes four steps:

- Adding a certificate template
- Adding a course provider
- Adding the accrediting/approving body
- Associating the certificate template, course provider and accrediting/approving body to attach/designate credit to a course.

Once the accreditation/approval has been set up, CE credit can be added to a course.

## **ADDING CE CREDIT TO A COURSE**

Continuing education (CE) credit can be added to administrator-developed courses, if the organization is accredited or approved to do so, using the CE Credit Management functionality. An unlimited number of CE credit types can be added to a single course.

Compliance with CE accreditation or approving body rules and regulations is the customer's responsibility. HealthStream strongly recommends involving those within your organization who have expertise in and responsibility for your continuing education program(s) if you choose to utilize the CE Credit Management functionality.

Carefully review the information in the CE Credit Management section of the Help system prior to utilizing this feature.

Prior to adding CE credit to a course, the accreditation/approval must be set up in the system.

If you change the amount of CE credit awarded by a course, any existing CE certificates that were earned by students before you made the change will continue to display the old CE credit amount until the certificate is refreshed. Certificates can be refreshed from the student transcript: click the course name to open the *Course Details* page, then click the **Refresh Credits** link.

### **To add CE credit to a course:**

**Note:** *If CE credit is added to a course that has already been published, you must republish the course to activate the CE credit.*

1. Search for the course to which you want to add CE credit. The *Course Builder* page appears.
2. Click **Manage Course CE Credit**. The *Manage Course CE Credit* page appears.
3. Click **Add Course CE Credit**. The *Add Course CE Credit* page appears.
4. In the **Accredited/Approved** list, select a provider.
5. In the **Credit Units** box, enter the number of credit units.
6. Leave the **Show certificate upon completion** check box selected unless you do not want students to receive a CE certificate.
7. In the **Initial Date** box, enter the initial date of course CE approval. Prior to this date, no CE credit will be issued for course completion.
8. In the **Expiration Date** box, enter the expiration date of course CE issuance. After this date, no further CE credit will be issued for course completion.
9. In the **Course Level Accreditation/Approval Statement** text area, add a statement, if desired.
10. Click **Save**.
11. To add another type of CE credit, click **Back to Course CE Credits**.
12. Click **Add Course CE Credit** and repeat Steps 4 - 10.

### **Tips**

- You can click [  ] to select the date.

## CAPTURING CE CREDIT FOR AN OUTSIDE LEARNING EVENT

CE credit that is received by students from another accredited/approved provider for an outside learning event can be added to the student's transcript. To do so, the administrator must create a generic CE accreditation/approval to associate with outside learning events.

This process simply provides a placeholder for indicating that CE credit was earned for the learning event. Do not replicate the accredited/approved provider status of the issuing provider, and do not associate credit from one of your actual accreditation or approval statuses.

**Note:** *CE credit awarded for outside learning events will not be differentiated from credit issued in-house on student transcripts or other reports.*

### To capture CE credit for an outside learning event:

**Note:** *It is not necessary to add a course level accreditation statement for an outside learning event.*

1. Create a certificate template titled **Outside Learning Event**. Suggested verbiage: *This is a placeholder certificate for an outside learning event and does not replicate or replace the originally-issued certificate awarded by the accredited/approved provider of the learning event.*
2. Create a course provider called *Outside Learning Event Course Provider*.
3. Create an accrediting/approving body called *Outside Learning Event Accrediting/Approving Body*. Suggested verbiage for Credit Unit Display Name field: *See original certificate.*
4. Create an accredited/approved provider by linking the Outside Learning Event certificate template, course provider, and accrediting/approving body. When creating the accredited/approved provider, select the **Allow credit when completion occurs from a Learning Event** check box. This step will make the learning event accreditation available when entering a new learning event.
5. Add the learning event.
6. Click **Add CE Credit to the Course**. A list of all accredited/approved providers that allow CE credit for a learning activity appears (those for which the **Allow credit when completion occurs from a learning event** check box has been selected).
7. Select the accredited provider.
8. Enter the number of credit units earned.
9. Select the **Show Certificate** check box if you wish students to see the generic learning event certificate on their transcript.
10. Click **Save Credit**.

# CERTIFICATE TEMPLATE

A certificate template is a placeholder certificate that will auto-populate with specific data (such as student's name and course name) when it is generated for course completion. You must follow accrediting/approving body guidelines for certificate issuance and for certificate layout and design.

## ADDING A CERTIFICATE TEMPLATE

To generate a custom default course or curriculum completion certificate, or a certificate for CE credit, to be added to an administrator-developed course, you must add a certificate template. It is not necessary to create a separate certificate template for every course in the system.

Students who receive CE credit for a course will receive two certificates: one for the course and one for the CE credit earned.

### Important Information about Certificate Templates

Certificate templates are dynamic, meaning, any time a change is made to the certificate template, or to any of the data fields from which code snippets draw their information, the certificate will be changed. For example, if a student completes a course and views or prints a certificate at the time of course completion, and subsequent changes are made to the certificate template itself or to data that are pulled into the certificate via code snippets, viewing or printing the certificate will display changes, not the certificate as it appeared at the time of course completion. This may pose a compliance issue for accrediting/approving bodies. To preserve a certificate as it was at the time of course completion when subsequent changes are made:

- Determine what page will be affected by the changes: certificate template, student record, course properties, accrediting/approving body, course provider, or accredited/approved provider.
- Create a new certificate template, as well as a new accrediting/approving body and/or course provider if needed.
- Create a new/updated accredited/approved provider.
- Create a new course or, if appropriate, a new version of the course, making the original course unavailable by retiring or inactivating the course. Attach the CE credit that includes the new/updated accreditation information and the new/updated certificate template.
- Currently enrolled students should be un-enrolled and re-enrolled into the new version of the course so that they will receive the appropriate CE credit information on their certificate upon course completion. Those completing the prior version of the course will continue to view/print the certificate as it was at the time of course completion.

#### To add a certificate template:

1. On the **Courses** tab, click **Add a Certificate Template**. The *Certificate Template Editor* page appears.
2. Enter a certificate template name. Be sure to enter a name that corresponds with the accrediting/approving body to which the certificate template is associated for easy recognition.

3. Select the **Share this certificate with subsidiary institutions** check box only if you are certain that this is compliant with accrediting/approving body guidelines. Selecting this box when a certificate template is added at the enterprise level makes the template available for use at the institution level.
4. Create the certificate template as required by the accrediting/approving body using the WYSIWYG (What You See Is What You Get) editor.
5. To add information to the certificate that is not available until an associated course is completed, such as **Course Name, Student Name, Completion Date**, etc., add a placeholder code snippet by clicking the code snippet icon [  ] to access the list.
6. Code snippets populate data to the generated certificate of course completion and can be placed where needed within the certificate template. Code snippets draw data from other pages within the system. For instance, the Credit Units code snippet draws data from the Add Course CE Credit page when CE is added to a course.
7. When you have completed designing the certificate template, click **Save** or click **Save and Add Another** if you wish to add an additional new certificate template.

★ **Tips**

- You can also follow the steps above to design a generic (non-CE) certificate template to associate with non-CE administrator-developed courses or curricula.

## SEARCHING FOR A CERTIFICATE TEMPLATE

➡ **To search for a certificate template:**

1. On the **Courses** tab, click **Manage Certificate Templates**. The *Search Certificate Templates* page appears.
2. Perform a certificate template search, searching by name or alphabetically. A list of certificate templates matching the search criteria appears.
3. Click the name link of the desired certificate.

## EDITING A CERTIFICATE TEMPLATE

### Important Information about Certificate Templates

Certificate templates are dynamic, meaning, any time a change is made to the certificate template, or to any of the data fields from which code snippets draw their information, the certificate will be changed. For example, if a student completes a course and views or prints a certificate at the time of course completion, and subsequent changes are made to the certificate template itself or to data that are pulled into the certificate via code snippets, viewing or printing the certificate will display changes, not the certificate as it appeared at the time of course completion. This may pose a compliance issue for accrediting/approving bodies. To preserve a certificate as it was at the time of course completion when subsequent changes are made:

- Determine what page will be affected by the changes: certificate template, student record, course properties, accrediting/approving body, course provider, or accredited/approved provider.
- Create a new certificate template, as well as a new accrediting/approving body and/or course provider if needed.
- Create a new/updated accredited/approved provider.
- Create a new course or, if appropriate, a new version of the course, making the original course unavailable by retiring or inactivating the course. Attach the CE credit that includes the new/updated accreditation information and the new/updated certificate template.
- Currently enrolled students should be un-enrolled and re-enrolled into the new version of the course so that they will receive the appropriate CE credit information on their certificate upon course completion. Those completing the prior version of the course will continue to view/print the certificate as it was at the time of course completion.

### **To edit a certificate template:**

1. Search for the certificate template that you want to edit.
2. From the search results, click the name of the desired certificate template. The *Edit an existing Certificate* page appears.
3. Make the desired edits.
4. Click **Save** or click **Save and Add Another** if you wish to add an additional new certificate template.

### **Related Topics**

- [Searching for a Certificate Template](#)

## **DELETING A CERTIFICATE TEMPLATE**

### **To delete a certificate template:**

**Note:** *You cannot delete a certificate template that is associated with an accredited provider.*

1. Search for the certificate template that you want to delete.
2. From the search results, click the name of the desired certificate template. The *Edit an existing Certificate* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the certificate template.

**Note:** *If a non-CE (generic) certificate template is deleted, the certificate will be removed from all associated course completions.*

## **COURSE PROVIDERS**

### **COURSE PROVIDERS OVERVIEW**

A course provider is the institution or group within your institution that is formally recognized by and on record with an accrediting/approving body as the provider of continuing education. For instance, the institution or enterprise itself may be the recognized course provider by one accrediting/approving body. Another accrediting/approving body may recognize the same course provider, or a department or service of the institution, such as the Staff Development Department. Refer to your accreditation/approval documentation to determine the course provider for each accreditation/approval. The only course providers required in the system are those that are formally recognized by an accrediting/approving body.

## ADDING A COURSE PROVIDER

### To add a course provider:

1. On the **Courses** tab, click **Add a Course Provider**. The *Add a Course Provider* page appears.
2. In the **Name** box, enter the course provider name.
3. In the **Address** boxes, enter the course provider address.
4. In the **City** box, enter the name of the city in which the course provider is located.
5. In the **State/Province** and **Country** lists, select the state or province and the country in which the course provider is located.
6. In the **Zip Code** and **Zip Code Ext** boxes, enter the zip code and zip code extension for the location of the course provider.
7. In the **Phone**, **Phone Ext**, and **Fax** boxes, enter the contact numbers.
8. Check the **Share this Course Provider with subsidiary institutions for course credit** check box *only if* you are certain that this action complies with accrediting/approving body guidelines.
9. Leave the **Make this course provider available in the system** check box selected to activate the course provider in the system.
10. Click **Save**.

## SEARCHING FOR A COURSE PROVIDER

### To search for a course provider:

1. On the **Courses** tab, click **Manage Course Providers**. The *Search Course Providers* page appears.
2. Search for the course provider by entering the course provider name, or using alphabetical search.
3. Click **Search**. A list of the course providers matching your search criteria appears.
4. Click the name link of the desired course provider. The *Provider Information* page appears.

## EDITING A COURSE PROVIDER

**To edit course provider information:**

1. Search for the course provider that you want to edit.
2. From the search results, click the name of the desired course provider. The *Edit an Existing Course Provider* page appears.
3. Make the desired edits.
4. Click **Save**.

**Caution:** If information on the course provider page is used to populate a code snippet within a certificate template, editing the information will change associated certificates wherever they are rendered in the system (for example, on the student's transcript).

**DELETING A COURSE PROVIDER****To delete a course provider:**

**Note:** You cannot delete a course provider that is associated with an accredited/approved provider.

1. Search for the course provider that you want to delete.
2. From the search results, click the name of the desired course provider. The *Edit an Existing Course Provider* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the course provider.

**ACCREDITING/APPROVING BODIES****ACCREDITING/APPROVING BODIES OVERVIEW**

Accrediting/approving bodies are organizations that accredit organizations or courses to provide designation of credit for specific healthcare disciplines. Customer organizations may be accredited or approved to provide continuing education by one or more accrediting/approving bodies. It is important that all accrediting/approving body guidelines be followed to ensure compliance with each CE program.

The Credit Type Display Name is the common terminology used by the accrediting/approving body for the type of credit being issued. Often the credit type display name is an acronym, for example, CNE (continuing nursing education) or CME (continuing medical education).

The Credit Unit Display Name is the credit currency used by the accrediting/approving body. Examples include Contact Hour, Credit, Continuing Education Unit (CEU), or Category I Credit.

**ADDING AN ACCREDITING/APPROVING BODY****To add an accrediting/approving body:**

1. On the **Courses** tab, click **Add an Accrediting/Approving Body**. The *Accrediting/Approving Body* page appears.
2. In the **Accrediting/Approving Body Full Name** box, enter the full name of the accrediting/approving body.
3. In the **Accrediting/Approving Body Short** name box, you can type the accrediting/approving body's short name or abbreviation, if there is one.
4. In the **Credit Type Display Name** box, enter the credit type display name. This is the common terminology used by the accrediting/approving body for the type of credit being issued. Often the credit type display name is an acronym, for example, *CNE* (continuing nursing education) or *CME* (continuing medical education).
5. In the **Credit Unit Display Name** box, enter the credit unit display name. This is the credit currency used by the accrediting/approving body. Examples include *Contact Hour*, *Credit*, *Continuing Education Unit (CEU)*, or *Category I Credit*.
6. In the **Applicable Disciplines** box, leave the **All Disciplines** check box selected to select all of the disciplines, or clear the **All Disciplines** check box and click individual discipline selections, based upon the accrediting/approving body guidelines. **Note:** *The disciplines are matched to each student's license and discipline information stored in the system to determine if CE credit will be awarded for course completion.*
7. In the **Applicable Country** list, click the desired country. (The default is United States.)
8. In the **Applicable States** box, leave the **All States** check box selected to select all of the states, or clear the **All States** check box and click individual state selections, based upon the accrediting/approving body guidelines. **Note:** *The states selected are matched to each student's license and discipline information stored in the system to determine if CE credit will be awarded for course completion.*
9. Select the **Share this accrediting/approving body with subsidiary institutions for course credit** check box only if you are certain that this is compliant with accrediting/approving body guidelines. Selecting this box when an accrediting/approving body is added at the enterprise level makes the accrediting/approving body available for use at the institution level.
10. The **Make this accrediting/approving body available in the system** check box is selected by default. Clear this box if you do not wish to make it available.

Click **Save**.

★ **Tips**

- Click [  ] to use the Spell Check feature.

## SEARCHING FOR AN ACCREDITING/APPROVING BODY

### To search for an accrediting/approving body:

1. On the **Courses** tab, click **Manage Accrediting/Approving Bodies**. The *Search Accrediting/Approving Bodies* page appears.
2. Perform a search using the accrediting/approving body name, or searching alphabetically or by all. All accrediting/approving bodies meeting your search criteria appear.
3. Click the name link of the desired accrediting/approving body. The *Edit an existing Accrediting/Approving Body* page opens.

## EDITING AN ACCREDITING/APPROVING BODY

### To edit an accrediting/approving body:

1. Search for the accrediting/approving body that you want to edit.
2. From the search results, click the name of the desired accrediting/approving body. The *Edit an Existing Accrediting/Approving Body* page appears.
3. Make the desired edits.
4. Click **Save**.

**Caution:** If information on the accrediting/approving body page is used to populate a code snippet within a certificate template, editing the information will change associated certificates wherever they are rendered in the system (for example, on the student's transcript).

## DELETING AN ACCREDITING/APPROVING BODY

### To delete an accrediting/approving body:

**Note:** You cannot delete accrediting/approving bodies that have associated accredited/approved providers.

1. Search for the accrediting/approving body that you want to delete.
2. From the search results, click the name of the desired accrediting/approving body. The *Edit an Existing Accrediting/Approving Body* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the accrediting/approving body.

## ACCREDITED/APPROVED PROVIDERS

Once the certificate template, course provider and accrediting/approving body have been added for a specific accreditation, the accredited/approved provider must be added, which links the above three components.

## ADDING AN ACCREDITED/APPROVED PROVIDER

### To add an accredited/approved provider:

1. Search for the accrediting/approving body for which you want to add an accredited/approved provider.
2. On the *Edit an Existing Accrediting/Approving Body* page, click **Add Accredited/Approved Provider**. The *Add an Accredited Provider* page appears.
3. In the **Course Provider** list, select the desired course provider.
4. In the **Certificate Template** list, select the desired certificate template.
5. Select the **Allow Partial Credit check box** (if enabled) if you wish to allow students to reduce the number of credits earned for courses.
6. Select the **Allow Credit when completion occurs from an Other Learning Event** check box only if you are certain that this is compliant with accrediting/approving body guidelines. If this check box is selected, and if this accredited/approved provider is used to apply CE credit to a course, students receiving course completion through a learning event and who qualify for the type of credit associated with the accredited/approved provider will also receive associated course CE credit. Left cleared, students may still receive course completion through a learning event, but will not receive any associated CE credit.
7. In the **Provider Number box**, enter the accreditation/approval provider number, if desired.
8. In the **Initial Date** box, enter an initial date of accreditation, if desired.
9. In the **Expiration Date** box, enter an expiration date of accreditation, if desired.
10. In the **Accreditation/Approval Statement** box, enter a statement, if desired.
11. Select the **Share this Accreditation/Approval with subsidiary institutions** check box if you want subsidiary institutions to have access to the accreditation/approval.
12. The **Make this Accreditation/Approval available in the system** check box is selected by default. Clear the box if you do not wish to make it available.
13. Click **Save**.

### Tips

- You can click [  ] to select the date.

- Information such as provider number, initial and expiration dates, and accreditation/approval statement may be pulled into the associated certificate template using the code snippets.

## SEARCHING FOR AN ACCREDITED/APPROVED PROVIDER

### To search for an accredited/approved provider:

1. Search for the accrediting/approving body that you want to edit.
2. From the search results, click the name of the desired accrediting/approving body. The *Edit an Existing Accrediting/Approving Body* page appears.
3. Click **View Accredited/Approved Providers**. A listing of accredited/approved providers associated with that accrediting/approving body appears on the *View Accredited/Approved Course Providers* page.
4. Click the name link of the desired accredited/approved provider to view the *Accredited/Approved Provider Information* page.

## EDITING AN ACCREDITED/APPROVED PROVIDER

### To edit accredited/approved provider information:

1. Search for the accrediting/approving provider that you want to edit.
2. Click the name link of the desired accredited/approved provider to view the *Accredited/Approved Provider Information* page.
3. Make the desired edits.
4. Click **Save**.

**Caution:** If information on the accredited/approved provider page is used to populate a code snippet within a certificate template, editing the information will change associated certificates wherever they are rendered in the system (for example, on the student's transcript).

## DELETING AN ACCREDITED/APPROVED PROVIDER

### To edit accredited/approved provider information:

1. Search for the accrediting/approving provider that you want to delete.
2. Click the name link of the desired accredited/approved provider to view the *Accredited/Approved Provider Information* page.
3. Make the desired edits.
4. Click **Save**.

**Caution:** If information on the accredited/approved provider page is used to populate a code snippet within a certificate template, editing the information will change associated certificates wherever they are rendered in the system (for example, on the student's transcript).

# Certification-Based Assignments

## CERTIFICATION-BASED ASSIGNMENTS

Certification-based assignments are used for student certification maintenance. They are recurring group assignments whose recurrence period is based on the certification period of a particular professional certification. Unlike normal recurring assignments, certification-based assignments can include a curriculum or an equivalent.

Certification-based assignments are made to certification-based student groups: profile student groups whose members hold the same certification issued by the same certifying body. Only students who have their certification information (certifying body, certification, AND expiration date) entered into the system can receive certification-based assignments. Students can manage their own certification information through the Certification Management feature. Administrators can manage a student's certification information from the *Manage a Student* page. Certification information can also be managed through a data import file.

When a student receives a certification-based assignment, the system calculates the due date based on the certification's expiration date. The due date for subsequent instances will be based on the assignment's previous completion date. The length of time between assignments is the same as the certification period: for example, the American Heart Association's Basic Life Support (BLS) certification is valid for two years, so students would receive an assignment based on the BLS certification every two years.

The Certification-Based Assignment feature does not support all professional certifications. See Supported Certifications for a list of certifications that can be used with this feature. Some supported certifications can also be system managed. This means that when students successfully complete a course that has been mapped to a certification, the system will automatically update the certification expiration date (see [System Managed Certifications](#) for more information about system managed certifications). The *Supported Certifications* page (see the link earlier in this paragraph) lists the courses mapped to certifications.

## CREATING A CERTIFICATION-BASED ASSIGNMENT

[View Show Me How](#)

Before you can create a certification-based assignment, there must be a student group in the system that is based on the same certification as the assignment. (See [Creating Certification-Based Student Groups](#).) The Certification-Based Assignment feature does not support all professional certifications. See [Supported Certifications](#) for a list of certifications that can be used with this feature.

The assignment will begin either on the current date or the next day, depending on your organization's *Default Assignment Start Date* setting.

See [Timing Considerations](#) to learn more about how the timing fields can affect assignment delivery.

 **To create a certification-based assignment:**

1. From the **Education** tab, click the **Add a Certification Based Assignment** link to open the *Add a Certification Based Assignment* form.
  - Required fields are indicated by an asterisk (\*).
2. Type a name for the assignment in the **Name** box.
3. If needed, type a description in the **Description** box.

- Assignment names and descriptions do not appear on students' *My Learning* page.
4. If you do not want the assignment to appear in routine search results, select the **Hide this Assignment from search results** check box.
  5. Select a certifying body from the **Select a Certifying Body** list to reveal the certification list.
  6. Select a certification from the **Select a Certification** list.
  7. Click the **Select** link next to the **Courses or Curricula or Equivalents** to open the *Browse* page.
  8. Search for a course, equivalent, or curriculum to assign. You can search by keyword, by category, or alphabetically.
    - You can only assign **one** item: one course, one curriculum, or one equivalent.
    - If you add a curriculum, then the certification-earning course should be the last course in the curriculum.
    - Curricula are recommended if a certification requires successful completion of more than one course. The completion of the entire curriculum determines the next assignment due date. Certification business rules, such as end of month grace periods, are applied to the next assignment as well.
    - If you want students' certifications to be managed by the system, be sure that you assign a course that is mapped to the certification for which you are creating the assignment. See [Supported Certifications](#) for a list of courses that are mapped to certifications.
  9. Click the **Search Student Groups** link to open the *Search Student Groups* page.
    - All student groups based on the same certification as the assignment (and **only** the student groups based on that certification) are listed at the bottom of the page.
    - If no student groups are listed, then there are no student groups in the system that are based on the same certification as the assignment.
  10. Select the check box next to the student group(s) that you want to receive the assignment
  11. Click **Select** to select the student group(s) and return to the *Add a Certification Based Assignment* form.
  12. Changing the default effective date is not generally recommended. However, if you want to give credit for completions in the current calendar month for certifications expiring at the end of the month, then it would be advisable to make the effective date the first day of the current calendar month. If your organization or institution has specific policies that dictate the acceptable assignment window for all students, such as 90 days, then it may be necessary to extend the effective date to the beginning of the month that includes this 90-day window in order to capture relevant completions for the first assignment.

13. Enter an end date in the **End Date** box if needed.

- Once an assignment end date arrives, the assigned courses, equivalents, or curricula cannot be completed to satisfy the assignment and student is marked as Delinquent on assignment-related reports. Items that have not been started will be removed from students' view entirely. In-progress items will become elective learning: students can complete it at their convenience (elective learning does not have a due date) or unenroll from it.

14. If you do not want the assignment to be automatically reassigned on failure, clear the **Automatically reassign course if student fails** check box.

- You can only edit this option for single-course assignments: if the assignment contains a curriculum or an equivalent, you cannot change this setting.

15. In the **Available Date** box, specify when the assignment should become visible to students.

16. In the **Due Date** box, specify when the assignment is due, relative to the certification expiration date.

- Certification based assignments are recurring assignments. The first time a student receives the assignment, the due date is calculated relative to the certification expiration date. Subsequent assignment due dates are calculated relative to the previous completion date.

17. Click the **Save** button.

## SUPPORTED CERTIFICATIONS

The Certification-Based Assignment feature supports the following certifications:

Certifying Body	Certification	Mapped Course(s)
American Heart Association	HeartCode ACLS	<ul style="list-style-type: none"> <li>• HeartCode ACLS - G2010 Parts 2 and 3 v5.0.8.11 (evaluation version)</li> <li>• HeartCode ACLS - G2010 Parts 2 and 3 v5.0.8.11 (non-evaluation version)</li> </ul>
American Heart Association	HeartCode BLS	<ul style="list-style-type: none"> <li>• HeartCode BLS Parts 2 and 3 - G2010 v5.0.8.11 (evaluation version)</li> </ul>

		<ul style="list-style-type: none"> <li>HeartCode BLS Parts 2 and 3 G2010 v5.0.8.11 (non-evaluation version)</li> </ul>
American Heart Association	HeartCode PALS	HeartCode PALS

## TIMING CONSIDERATIONS

### DUE DATE OF THE FIRST ASSIGNMENT INSTANCE

It is important to remember that the due date of the first instance of a certification-based assignment is based on the certification expiration date. When you create a certification-based assignment, the system examines the certification expiration date of each student in the group that is receiving the assignment. Then the system subtracts the number of days that you entered in the **Due Date** box to determine the due date for the first instance of the assignment. This is generally straightforward, but there is a case in which the calculated due date may not be as expected: students with certifications that are *about to expire*.

Consider an assignment that was created on June 15, with an effective date of June 1, and a Due Date of 30 days before the certification expiration date. Now imagine a student whose certification expires on June 20. The system will calculate a due date of May 21 (30 days before June 20), but this would make the due date prior to the effective date, which is not allowed. The system will adjust the due date to one day after the assignment effective date.

### STUDENTS WITH EXPIRED CERTIFICATIONS

Students whose certification is already expired when you create the assignment will receive the assignment, but it will immediately be past due.

### RENEWAL OF CERTIFICATION DOES NOT NECESSARILY EQUAL COMPLETION OF ASSIGNMENT

It is possible to have a curriculum whose final course (or a course whose final learning activity) is not the course (or learning activity) that earns the certification on which the assignment is based. For example, the evaluation version of HeartCode courses contains an evaluation as its final learning activity, which comes after the skills check (the skills check is what earns the certification). The certification-based assignment uses the *completion date* to calculate the next due date, not the new certification date (the certification expiration date is only used to calculate the *first* assignment instance due date). To avoid assignment due dates getting out of sync with certification expiration dates, students should be sure that their assignment completion date is as close as possible to the date on which they earned their certification.

### ESTABLISH A POLICY ABOUT ASSIGNMENT TIMING DATES

It is recommended that you establish a policy regarding effective date (how far back you want the assignment to look for course completions) and available date (how long you want to give students to complete the assignment).

### HEARTCODE CONSIDERATIONS

- Mapped courses can only be used for completions using the voice-assisted manikins or the HeartCode Instructor Organization.

- For completion using the HeartCode Instructor Organization, students must log off from the system before the instructor enters their grade.
- AHA certifications expire at the end of the month, regardless of which day the certification was earned. The system takes this into account when calculating due dates.
- The recommended practice for certification-based assignments using HeartCode Parts 1, 2 and 3 is to assign the courses as a curriculum.



# Certification Management

## CERTIFICATION MANAGEMENT

If certification management is enabled at your institution, administrators can manage students' certification information. This feature is accessible from the *Manage a Student* page.

## SYSTEM MANAGED CERTIFICATIONS

The System Managed Certifications feature provides automated management of student certification information. When a student successfully completes a course **that is linked to a system managed certification**, the certification expiration date (viewed from the **Certifications** section of the student record) is automatically advanced. If the student does not have a certification listed in his record, one will be added automatically. A **View History** link on the *Edit Certification* page of the student record displays an audit history for the certification.

**Not all certifications can be system managed, and only approved courses can satisfy certification requirements.**

System management of certification information is activated for selected certifications at the student record level, from the **Certifications** section. Certifications that can be system managed have a **System Managed** setting that administrators, if they are assigned the appropriate role, can edit. When a student's certification information is set to be system managed, neither the student nor administrators without the appropriate role can edit the expiration date, certifying body, certification name, or **System Managed** setting.

The following certifications can be system managed:

- American Heart Association
- Basic Life Support (BLS)
- Advanced Cardiovascular Life Support (ACLS)
- Pediatric Advanced Life Support (PALS)

## VIEWING THE AUDIT HISTORY FOR A SYSTEM MANAGED CERTIFICATION

Audit history is only available for system managed certifications.

 **To view the audit history for a student's system-managed certification information:**

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Search for the student whose certification information you want to view.
3. Click the student's name from the search results list to open the student record.
4. From the left-hand navigation pane, click the **Certifications** link to open the **View Certifications** page.

5. Click a certification to open the *Edit Certification* page.
6. Click the **View History** link to open the *Certification History* page in a new browser window.

## VIEWING CERTIFICATION INFORMATION

Students can record any certifications they have earned.

### To view a student's certification information:

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Click **Certifications** from the left-hand navigation tree. The *View Certifications* page appears.

## ADDING A CERTIFICATION TO A STUDENT RECORD

### To add a certification to a student record:

1. From the **People** tab, click the **Manage Students** link to open the student management search criteria page.
2. Search for the student whose record you want to edit.
3. From the search results list, click a name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **Certifications** link to open the certifications page.
5. Click the **Add Certification** link to open the certification information form.
6. Complete the form.
  - Required fields are marked with an asterisk (\*).
  - If the certification you are adding can be system managed, and you have been assigned the appropriate role, you can set the **System Managed** setting to *Yes* (to have the system manage the student's certification information) or *No* (if you want the student's certification to be managed manually). For more information about system managed certification, see System Managed Certifications.
7. Click **Save**.

## EDITING CERTIFICATION INFORMATION

### To edit certification information:

1. From the **People** tab, click the **Manage Students** link to open the student management search criteria page.
2. Search for the student whose record you want to edit.
3. From the search results list, click a name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **Certifications** link to open the certifications page.
5. Click a certification name to open the *Certifications* page.
6. Make any necessary edits.
  - Required fields are marked with an asterisk (\*).
  - If the certification you are editing can be system managed, and you have been assigned the appropriate role, you can set the **System Managed** setting to *Yes* (to have the system manage the student's certification information) or *No* (if you want the student's certification to be managed manually). For more information about system managed certifications, see *System Managed Certifications*
7. Click **Save**.

## DELETING CERTIFICATIONS

### To delete a certification from a student record:

1. From the **People** tab, click the **Manage Students** link to open the student management search criteria page.
2. Search for the student whose record you want to edit.
3. From the search results list, click a name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **Certifications** link to open the *Certifications* page.
5. Click a certification name to open the *Certification Information* page.
6. Click **Delete**.
7. When prompted to confirm the deletion, click **OK**.



# Checklist Management

## CHECKLISTS OVERVIEW

A checklist is a list of tasks for a student to perform in the presence of an evaluator, who gives each task a rating (e.g., *Pass* or *Fail*, *Met* or *Unmet*, *True* or *False*), depending on whether or not it was performed correctly. Checklists are assigned to students through courses that contain one or more checklist learning activities.

When students click the course name, they can view the course details; clicking a checklist learning activity from the *Course Details* page opens a read-only view of the checklist, which students can print and study.

Please Note: This is a read-only view of the checklist. This checklist must be submitted as *PASS* by an evaluator.

### Introduction

Go down the checklist in order and give the Intern a pass or fail grade for each step.

- 1 Assesses character, location, radiation, duration, precipitating events, and relieving measures
- 2 Assesses for signs of shortness of breath, edema, and weight gain
- 3 Evaluates complaints of palpitation
- 4 Evaluates complaints of fatigue
- 5 Evaluates complaints of dizziness, syncope, or loss of consciousness
- 6 Assesses for orthostatic hypotension
- 7 Assesses arterial pulses using a 0-4 scale
- 8 Assesses for jugular vein distension
- 9 Auscultates heart sounds
- 10 Assesses extremities for vascular changes

This view also includes an **Evaluators** link. Clicking this link displays a list of people who have been designated as evaluators for the checklist.

Evaluators are associated with a checklist through student groups (see [Associating Evaluators with Checklists](#) for more information about associating evaluators) To evaluate a student, the evaluator clicks the **Manage Checklists** link on his or her To-Do list to open the Search Checklists page, and locates the checklist to be evaluated.

Connections To Do Completed Profile ▾ Catalog Upcoming Events Help

## Search Checklists

Search by Student  × ▾

Search by Checklist  ▾

Checklists *Showing 1 - 1 of 1*

<b>Cardiac Problems</b> Course Name: Checklist Cardiac Problems [v.2] STATUS: Not Yet Started	Due: Dec 30, 2015	Evaluate ▾
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Clicking the **Evaluate** button opens the checklist.

## Introduction

Go down the checklist in order and give the Intern a pass or fail grade for each step.

## Evaluator Guidelines

Ensure that the Intern can perform all steps of the checklist correctly.

1	Assesses character, location, radiation, duration, precipitating events, and relieving measures	Met	Unmet
2	Assesses for signs of shortness of breath, edema, and weight gain	Met	Unmet
3	Evaluates complaints of palpitation	Met	Unmet
4	Evaluates complaints of fatigue	Met	Unmet
5	Evaluates complaints of dizziness, syncope, or loss of consciousness	Met	Unmet
6	Assesses for orthostatic hypotension	Met	Unmet
7	Assesses arterial pulses using a 0-4 scale	Met	Unmet
8	Assesses for jugular vein distension	Met	Unmet
9	Auscultates heart sounds	Met	Unmet
10	Assesses extremities for vascular changes	Met	Unmet

## Comments






Administrators must add instructions for the student, which appear on the checklist. Administrators can also include guidelines for evaluators, to assist them in working with students.

As the student performs the steps, the evaluator clicks **Pass** or **Fail** (or **Met** or **Unmet**, **True** or **False**, etc., depending on how the administrator configured the checklist). The learning activity's completion mode settings determine whether or not the student must pass all of the steps (see [Creating a New Checklist Learning Activity](#) for more information about these settings). A **Comments** box on the checklist enables evaluators to provide written feedback. Administrators can configure the checklist so that comments are visible to evaluators and administrators, but not to students.

Evaluators cannot submit a checklist unless they have recorded a response for *each item*.

If the student does not complete the checklist successfully, *Requires repeat* appears on the student's *Course Details* page and the evaluator's *Search Students* page. Students can make as many attempts, with as many different evaluators, as needed.

## CREATING A NEW CHECKLIST LEARNING ACTIVITY

The following instructions assume that you have already either located and opened the existing course to which you want to add the checklist learning activity, or created the course shell for a new course. If you want to add a checklist learning activity to a course that has been published, you must create a new version of the course first. After you have made your changes, you must republish the course. See [Creating a New Course Version and Republishing a Course](#) for more information.

When you create a new course version, all previous evaluator associations are removed from existing checklists. You will need to reassociate evaluators with the checklists in the course. See [Associating Evaluators with Checklists](#) for more information about associating evaluators.

Evaluators cannot submit a checklist unless they have recorded a response for *each item*.

### ➔ To create a new checklist learning activity:

1. From the Course Builder, click the **Add a checklist** link to open the checklist common properties form.
2. Complete the form.
  - Fields marked with an asterisk (\*) are required.
  - you must select a completion mode:
    - *Completion Required*—students must complete the checklist to complete the course, but do not have to pass all of the checklist tasks.
    - *Pass Required*—students must pass all of the checklist tasks for the checklist to appear on their transcript. If one task in the list is failed, the entire checklist is failed and it returns to the To-Do List to be attempted again. There is no limit to the number of times a student can attempt to pass the checklist. When all of the checklist tasks are passed, the checklist's status will read *Passed*.
  - If you are not weighting the course activity scores, the **Score Percent Weight** value must be 0.
  - If you are an enterprise-level administrator, and you want administrators at subsidiary institutions to be able to override this activity, select the **Allow this learning activity to be overwritten** check box.

3. Click the **Save** button to save the checklist common properties and open the checklist editor.
4. Type instructions for the checklist in the **Instructions** box.
  - Both students and evaluators will be able to see the instructions.
5. If necessary, type guidelines for the evaluators in the **Evaluator Guidelines** box.
  - Only evaluators will be able to see the evaluator guidelines.
6. If you want a button to appear on the checklist that evaluators can click to mark all tasks as passed, select the **Allow evaluators to pass all tasks with a single click** check box.
7. If you want multiple evaluators to be able to collaborate on the same checklist, select the **Allow all evaluators to share the completion of this checklist** check box.
  - When this check box is selected, an evaluator can rate some of the tasks on the checklist, save his or her progress, and have another evaluator continue rating tasks later.
8. If you do not want students to see evaluator comments, clear the **Allow students to see evaluator comments** check box.
9. Select an option from the **Response Text** list. This is the text (*Pass/Fail, Met/Unmet, etc.*) that will appear on the buttons that the evaluator clicks to record the student's performance.
10. To add a task, type a task description in the **Section Title/Task Description** box (this is the text that will appear on the checklist).
11. If you want evaluators to have a *Not Applicable (N/A)* option for the task (allowing the student to skip it), select the **Allow Not Applicable** check box for the task.
12. To add a section title, select the **Section** check box and type a title in the **Section Title/Task Description** box.
  - If you use sections, then the first item in the checklist must be a section title.
  - A section must contain at least one task.
  - A checklist cannot end with an empty section.
  - Section titles are used to break the checklist into sections.
13. If you need to add another task or section title, click the **Add Task** button to create a new **Section Title/Task Description** box.
14. Continue adding tasks and section titles as needed.

- To change a task or section title's order in the list, click and hold its move button [  ] and drag the task to its new position.
- To delete a task or section title, click its delete button [  ].

15. Click the **Save** button to save the checklist activity.

- If you receive an error message stating that *Task Description is required*, then there is a blank **Task** box in the list. Either type a task description in the box or delete it.

## PREVIEWING A CHECKLIST (EVALUATOR VIEW)

You can see how a checklist looks to an evaluator.

### To preview a checklist as an evaluator:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist that you want to preview.
3. From the search results, click the course name to open the Course Builder.
4. From the left-hand navigation pane, click a checklist learning activity to open the checklist editor.
5. Click the **Preview as Evaluator** link near the top of the page to open the checklist preview in a new browser window.

## ASSIGNING CHECKLISTS TO STUDENTS

Checklist learning activities are added to courses. See [Adding a Group Assignment](#) and [Adding an Individual Assignment](#) for more information on assigning courses.

## ASSOCIATING EVALUATORS WITH CHECKLISTS

Evaluators are students responsible for observing other students and validating that their checklist tasks are completed correctly. After a course that contains one or more checklists is published, an administrator can associate each checklist with one or more student groups. Each member of an associated student group becomes an evaluator for that checklist.

It is recommended that you adopt a naming convention for evaluator student groups (for example, including the word *evaluator* in the group name).

Immediately after you publish a course that includes one or more checklists, a link will be displayed that enables you to associate evaluators with checklists. You can also associate evaluators at any time after publishing, from a link on the **Courses** tab.

### To associate evaluators with a checklist:

1. From the **Courses** tab, click the **Manage Checklist Evaluators** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist with which you want to associate evaluators.
  - Only courses with checklists will appear in the search results.
3. From the search results, click the course name to open the *Associate Evaluators to Checklists* page.
4. From the **Checklists** list, select the checklist with which you want to associate evaluators.
  - If the course only contains one checklist, the selection will be made for you.
5. Select one or more student groups whose members will serve as evaluators for the checklist.
  - If you need to create a new student group, click the **Add New Student Group** link. See Adding an Individual Student Group and [Adding a Profile Student Group](#) for more information about creating student groups.
  - Click the **Search Student Groups** link to search for and select existing student groups.
  - Selected student groups are displayed in the **Evaluator Student Groups** box.
6. Click **Save**.

If you are associating evaluators from the publish confirmation page, click the **Click here to manage evaluator student groups for these checklists** link to open the *Associate Evaluators to Checklists* page, and skip the first three steps above.

## DISASSOCIATING STUDENT GROUPS FROM A CHECKLIST

You can remove the relationship between a checklist and any of the evaluator student groups that have been associated with it. The members of any dissociated groups will no longer be evaluators for that checklist.

### To disassociate evaluator student groups from a checklist:

1. From the **Courses** tab, click the **Manage Checklist Evaluators** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist with which you want to disassociate evaluators.
  - Only courses with checklists will appear in the search results.
3. From the search results, click the course name to open the *Associate Evaluators to Checklists* page.
4. In the **Evaluator Student Groups** box, clear the check box next to the student groups that you want to disassociate from the checklist.
5. Click **Save**.

## DISASSOCIATING CHECKLISTS FROM A STUDENT GROUP

 **To disassociate checklists from a student group:**

1. From the **People** tab, click the **Manage Student Groups** link to open the *Search Student Groups* page.
2. Specify the search criteria that you want to use.
3. Click the **Search** button.
  - From the search results, click the **Manage Checklists** link for the student group whose associated checklists you want to see.
  - The **Manage Checklists** link is disabled for student groups that do not have checklists associated with them.
  - The *Student Group Associations* page, which opens when you click the **Manage Checklists** link, displays all of the checklists that are associated with the student group. The checklists are grouped by course.
4. Select the check box in the **Disassociate Checklist** column for any checklists that you need to disassociate from the current student group.
  - Select the **Select All** check box to select all of the check boxes on the page.
5. Click the **Save** button.

**Related Topics**

## **VIEWING THE CHECKLISTS ASSOCIATED WITH AN EVALUATOR STUDENT GROUP**

 **To view the checklists that are associated with an evaluator student group:**

1. From the **People** tab, click the **Manage Student Groups** link to open the *Search Student Groups* page.
2. Specify the search criteria that you want to use.
3. Click the **Search** button.
  - From the search results, click the **Manage Checklists** link for the student group whose associated checklists you want to see.
  - The **Manage Checklists** link is disabled for student groups that do not have checklists associated with them.

- The *Student Group Associations* page, which opens when you click the **Manage Checklists** link, displays all of the checklists that are associated with the student group. The checklists are grouped by course.

From the *Student Group Associations* page, you can click a checklist's **Manage** link to change the student groups that are associated with it. You can also disassociate the current student group from any or all of its associated checklists (see [Disassociating Checklists from a Student Group](#)).

## Related Topics

## EDITING A CHECKLIST

If you want to edit a checklist that is part of a published course, you must first create a new version of the course. After you have made your changes, you must republish the course. See [Creating a New Course Version and Republishing a Course](#) for more information.

When you create a new course version, all previous evaluator associations are removed from existing checklists. You will need to reassociate evaluators with the checklists in the course. See [Associating Evaluators with Checklists](#) for more information about associating evaluators.

### To edit a checklist:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist that you want to edit.
3. From the search results, click the course name to open the Course Builder.
4. From the left-hand navigation pane, click the checklist to open the checklist editor.
5. Make any necessary changes.
  - To change a task's order in the list, click and hold its move button [] and drag the task to its new position.
  - To delete a task, click its delete button [].
6. Click **Save**.

## HIDING EVALUATOR COMMENTS FROM STUDENTS

You can prevent evaluator comments from being visible to students. Administrators and other evaluators will be able to see the comments.

### To hide evaluator comments from students:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.

2. Search for the course that contains the checklist that you want to edit.
3. From the search results, click the course name to open the Course Builder.
4. From the left-hand navigation pane, click the checklist to open the checklist editor.
5. Clear the **Allow students to see evaluator comments** check box.
6. Click **Save**.

## DELETING CHECKLISTS

If you want to delete a checklist that is part of a published course, you must first create a new version of the course. After you have made your changes, you must republish the course. See [Creating a New Course Version and Republishing a Course](#) for more information.

When you create a new course version, all previous evaluator associations are removed from existing checklists. You will need to reassociate evaluators with the remaining checklists in the course (if any). See [Associating Evaluators with Checklists](#) for more information about associating evaluators.

### To delete a checklist:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist that you want to delete.
3. From the search results, click the course name to open the Course Builder.
4. From the left-hand navigation pane, click the checklist to open the checklist editor.
5. Click the **Common Properties** link to open the common properties form.
6. Click the **Delete** button.
7. When prompted to confirm the deletion, click **OK**.

## EXPORTING CHECKLISTS

You can export a checklist learning activity from one course and import it into another.

### To export a checklist:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist that you want to export.
3. From the search results, click the course name to open the Course Builder.

4. From the left-hand navigation pane, click a checklist learning activity to open the checklist editor.
5. Click the **Export** link near the top of the page to open a save file dialog.
6. Save the file to your computer.

## IMPORTING CHECKLISTS

Checklist data can be exported from one checklist activity as an .hte file and imported into another checklist activity. (See Exporting Checklists.)

You can import checklist data at the same time that you create a new checklist activity, or you can import the data into an existing checklist activity. Imported tasks will be added *below* any existing tasks. You will be able to choose which parts of the existing checklist (if any) are overwritten by the file that you import. If you import a checklist that contains sections, the system will automatically add a blank section title at the top of the checklist activity into which you are importing the data.

If you want to import a checklist into a course that has been published, you must first create a new version of the course. After you have made your changes, you must republish the course. See [Creating a New Course Version and Republishing a Course](#) for more information.

The following instructions assume that you want to import a checklist into an existing checklist activity that is part of an unpublished course.

### To import a checklist:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.
2. Search for the course into which you want to import a checklist.
3. From the search results, click the course name to open the Course Builder.
4. From the left-hand navigation pane, click the checklist activity to open the checklist editor.
5. Click the **Import** link near the top of the page to open the *Checklist Import* page.
6. Click the **Browse** button to open a *Choose File to Upload* dialog.
7. Navigate to the .hte file that you want to import and click it to select it.
8. Click the **Open** button to return to the *Checklist Import* page.
9. Click the **Load** button to load the file and display the import options.
10. Select the **Overwrite instructions** check box if you want to replace the current instructions (if there are any) with the instructions in the file that you are importing.
11. Select the **Overwrite evaluator guidelines** check box if you want to replace the current evaluator guidelines (if there are any) with the guidelines in the file that you are importing.

12. Select the **Overwrite tasks** check box if you want to replace the current tasks (if there are any) with the tasks in the file that you are importing.
13. In the **Tasks** section, clear the check box next to any tasks that you do NOT want to import.
14. Click the **Import** button.
15. When prompted to confirm the import, click **OK** to import the file and return to the checklist editor.
16. Make any necessary adjustments.
  - To change a task's order in the list, click and hold its move button [] and drag the task to its new position.
  - To delete a task, click its delete button [].
17. Click **Save**.

## ENTERPRISE-LEVEL CONSIDERATIONS

If you are an enterprise-level administrator and plan to publish courses with checklist activities to subsidiary institutions, keep the following things in mind:

- You can assign evaluator student groups at the enterprise level, but students at subsidiaries will only be able to see evaluators who belong to their institution.
- Administrators at subsidiaries can add their own institution-specific evaluator student groups.
- Institution-level administrators cannot edit enterprise-level student groups.
- Institution-level student groups cannot be edited from the enterprise level (although enterprise-level administrators can navigate to the institution level and edit student groups from there).

## CHECKLIST TASK ANALYSIS REPORT

The Checklist Task Analysis report displays the number of students who have completed the checklist, the number of tasks on the checklist, and the total number of checklist attempts. For each checklist task, the number and percentage of times that the task was passed, failed, or skipped is also displayed.

### To run the Checklist Task Analysis report:

1. From the **Education Reports** section of the **Reports** tab, click the **Checklist Task Analysis** link to open the criteria selection page.
2. Click the **Select a Course** link to open the *Browse for a Course* page.
3. Search for the course that contains the checklist for which you want to run the report.

4. From the search results, click the course name to select it and return to the criteria selection page.
5. Select a course version from the **Course Version** list.
6. Click the **Select a Checklist** link to open the *Checklist Override Selector* page.
7. From the left-hand pane, click a checklist name to select it.
8. Click the **Continue** button to return to the criteria selection page.
9. Specify a completion date range.
  - Select the option button next to the predefined range list and select a predefined date range, or
  - Select the option button next to the **From** box and enter dates in the **From** and **Through** boxes.
10. Click the **Continue** button to run the report.



# Classes

## CLASSES OVERVIEW

A class is an instructor-led learning activity added to an administrator-developed course. Classes must be scheduled (date and time) and instructors, locations, and necessary resources must be identified for each class. Classes can be held as live, instructor-led events, or as virtual class webinars.

### TIME ZONES

When scheduling class dates and times, you will be presented with a drop-down list of global time zones from which to choose. There is no global standard for time zones. These time zones are based upon the standardized lists found in Windows.

## TIME ZONE ABBREVIATIONS

The following table contains a listing of the time zone abbreviations.

Abbreviation	Description	Central	LiveMeeting	Windows
ET	(UTC-05:00) Eastern Time (US & Canada)	US/Eastern	America/New York	Eastern Time Standard
CT	(UTC-06:00) Central Time (US & Canada)	US/Central	America/Chicago	Central Time Standard
MT	(UTC-07:00) Mountain Time (US & Canada)	US/Mountain	America/Denver	Mountain Time Standard

PT	(UTC-08:00) Pacific Time (US & Canada)	US/Pacific	America/Los Angeles	Pacific Standard Time
AK	(UTC-09:00) Alaska	America/Anchorage	America/Anchorage	Alaskan Standard Time
HAST	(UTC-10:00) Hawaii	Pacific/Honolulu	Pacific/Honolulu	Hawaiian Standard Time
MST	(UTC-07:00) Arizona	US/Arizona	America/Phoenix	Mountain Standard Time
AST	(UTC-04:00) Atlantic Time (Canada)	Canada/Atlantic	America/Aruba	Atlantic Standard Time
MOST	(UTC) Casablanca	Africa/Casablanca	Africa/Casablanca	Morocco Standard Time
UTC	(UTC) Coordinated Universal Time	UTC	Etc/GMT+0	UTC

GMT	(UTC) Dublin, Edinburgh, Lisbon, London	Europe/London	Europe/London	GMT Standard Time
GST	(UTC) Monrovia, Reykjavik	Africa/Casablanca	Africa/Casablanca	Greenwich Standard Time
WET	(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna	Europe/Amsterdam	Europe/Amsterdam	West Europe Standard Time
CET	(UTC+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague	Europe/Belgrade	Europe/Belgrade	Central Europe Standard Time
RST	(UTC+01:00) Brussels, Copenhagen, Madrid, Paris	Europe/Brussels	Europe/Copenhagen	Romance Standard Time

CEST	(UTC+01:00) Sarajevo, Skopje, Warsaw, Zagreb	Europe/Sarajevo	Europe/Sarajevo	Central European Standard Time
ECT	(UTC+01:00) West Central Africa	Africa/Brazzaville	Africa/Douala	W. Central Africa Standard Time
JST	(UTC+02:00) Amman	Europe/Athens	Europe/Bucharest	Jordan Standard Time
GTBST	(UTC+02:00) Athens, Bucharest, Istanbul	Europe/Athens	Europe/Bucharest	GTB Standard Time
MEST	MEST (UTC+02:00) Beirut	Africa/Cairo	Africa/Cairo	Middle East Standard Time
EGST	EGST (UTC+02:00) Cairo	Africa/Cairo	Africa/Cairo	Egypt Standard Time

SST	(UTC+02:00) Damascus	Africa/Cairo	Africa/Cairo	Syria Standard Time
SAST	(UTC+02:00) Harare, Pretoria	Africa/Harare	Africa/Harare	South Africa Standard Time
EET	(UTC+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius	Europe/Helsinki	Europe/Helsinki	FLE Standard Time
ISST	(UTC+02:00) Jerusalem	Asia/Jerusalem	Asia/Jerusalem	Israel Standard Time
EEST	(UTC+02:00) Minsk	Asia/Jerusalem	Asia/Jerusalem	E. Europe Standard Time
NMST	(UTC+02:00) Windhoek	Asia/Jerusalem	Asia/Jerusalem	Namibia Standard Time
ARST	(UTC+03:00) Baghdad	Asia/Baghdad	Asia/Baghdad	Arabic Standard Time

ABST	(UTC+03:00) Kuwait, Riyadh	Asia/Kuwait	Asia/Kuwait	Arab Standard Time
MSK	(UTC+03:00) Moscow, St. Petersburg, Volgograd	Europe/Moscow	Europe/Moscow	Russian Standard Time
EAT	(UTC+03:00) Nairobi	Asia/Kuwait	Asia/Kuwait	E. Africa Standard Time
IRST	(UTC+03:30) Tehran	Asia/Tehran	Asia/Tehran	Iran Standard Time
ARBST	(UTC+04:00) Abu Dhabi, Muscat	Asia/Muscat	Asia/Muscat	Arabian Standard Time
AZT	(UTC+04:00) Baku	Asia/Baku	Asia/Baku	Azerbaijan Standard Time

MUT	(UTC+04:00) Port Louis	Asia/Baku	Asia/Baku	Mauritius Standard Time
GET	(UTC+04:00) Tbilisi	Asia/Baku	Asia/Baku	Georgian Standard Time
AMT	(UTC+04:00) Yerevan	Asia/Baku	Asia/Baku	Caucasus Standard Time
AFT	(UTC+04:30) Kabul	Asia/Baku	Asia/Baku	Afghanistan Standard Time
YEKT	(UTC+05:00) Ekaterinburg	Asia/Tashkent	Asia/Yekaterinburg	Ekaterinburg Standard Time
PKT	(UTC+05:00) Islamabad, Karachi	Asia/Tashkent	Asia/Karachi	Pakistan Standard Time
WAST	(UTC+05:00) Tashkent	Asia/Tashkent	Asia/Yekaterinburg	West Asia Standard Time

IST	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi	Asia/Calcutta	Asia/Calcutta	India Standard Time
SLT	(UTC+05:30) Sri Jayawardenepura	Asia/Calcutta	Asia/Calcutta	Sri Lanka Standard Time
NPT	(UTC+05:45) Kathmandu	Asia/Katmandu	Asia/Katmandu	Nepal Standard Time
BTT	(UTC+06:00) Astana	Asia/Dhaka	Asia/Dhaka	Central Asia Standard Time
BST	(UTC+06:00) Dhaka	Asia/Dhaka	Asia/Dhaka	Bangladesh Standard Time
NCAST	(UTC+06:00) Novosibirsk	Asia/Almaty	Asia/Dhaka	N. Central Asia Standard Time

MYST	(UTC+06:30) Yangon (Rangoon)	Asia/Rangoon	Asia/Rangoon	Myanmar Standard Time
THA	(UTC+07:00) Bangkok, Hanoi, Jakarta	Asia/Bangkok	Asia/Bangkok	SE Asia Standard Time
KRAT	(UTC+07:00) Krasnoyarsk	Asia/Bangkok	Asia/Bangkok	North Asia Standard Time
	(UTC+08:00) Beijing, Chongqing, Hong Kong, Urumqi	Asia/Hong Kong	Asia/Hong Kong	China Standard Time
IRKT	(UTC+08:00) Irkutsk	Asia/Irkutsk	Asia/Irkutsk	North Asia East Standard Time
SNST	(UTC+08:00) Kuala Lumpur, Singapore	Asia/Singapore	Asia/Taipei	Singapore Standard Time

AWST	(UTC+08:00) Perth	Australia/Perth	Australia/Perth	W. Australia Standard Time
TIST	(UTC+08:00) Taipei	Asia/Taipei	Asia/Taipei	Taipei Standard Time
UST	(UTC+08:00) Ulaanbaatar	Asia/Taipei	Asia/Taipei	Ulaanbaatar Standard Time
TST	(UTC+09:00) Osaka, Sapporo, Tokyo	Asia/Tokyo	Asia/Tokyo	Tokyo Standard Time
KST	(UTC+09:00) Seoul	Asia/Seoul	Asia/Seoul	Korea Standard Time
YAKT	(UTC+09:00) Yakutsk	Asia/Yakutsk	Asia/Yakutsk	Yakutsk Standard Time
CAUST	(UTC+09:30) Adelaide	Australia/Adelaide	Australia/Adelaide	Cen. Australia Standard Time

ACST	(UTC+09:30) Darwin	Australia/Darwin	Australia/Darwin	AUS Central Standard Time
EAST	(UTC+10:00) Brisbane	Australia/Brisbane	Australia/Brisbane	E. Australia Standard Time
AEST	(UTC+10:00) Canberra, Melbourne, Sydney	Australia/Sydney	Australia/Sydney	AUS Eastern Standard Time
WPST	(UTC+10:00) Guam, Port Moresby	Pacific/Guam	Pacific/Guam	West Pacific Standard Time
TAST	(UTC+10:00) Hobart	Australia/Hobart	Australia/Hobart	Tasmania Standard Time
VLAT	(UTC+10:00) Vladivostok	Asia/Vladivostok	Asia/Vladivostok	Vladivostok Standard Time

SBT	(UTC+11:00) Magadan, Solomon Is., New Caledonia	Pacific/Guadalcanal	Pacific/Guadalcanal	Central Pacific Standard Time
NZST	(UTC+12:00) Auckland, Wellington	Pacific/Auckland	Pacific/Auckland	New Zealand Standard Time
UTC12	(UTC+12:00) Coordinated Universal Time+12	Etc/GMT-12	Etc/GMT-12	UTC+12
FJT	(UTC+12:00) Fiji	Pacific/Fiji	Pacific/Fiji	Fiji Standard Time
PETT	(UTC+12:00) Petropavlovsk-Kamchatsky - Old	Asia/Kamchatka	Etc/GMT+12	Kamchatka Standard Time
PHOT	(UTC+13:00) Nuku'alofa	Pacific/Tongatapu	Pacific/Tongatapu	Tonga Standard Time

AZOST	(UTC-01:00) Azores	Atlantic/Azores	Atlantic/Azores	Azores Standard Time
CVT	(UTC-01:00) Cape Verde Is.	Atlantic/Cape Verde	Atlantic/Cape Verde	Cape Verde Standard Time
ESAST	(UTC-03:00) Brasilia America/Sao_Paulo	America/Sao_Paulo	America/Sao_Paulo	E. South America Standard Time
ART	(UTC-03:00) Buenos Aires	America/Buenos Aires	America/Buenos Aires	Argentina Standard Time
SAEST	(UTC-03:00) Cayenne, Fortaleza	SA Eastern Standard Time	SA Eastern Standard Time	SA Eastern Standard Time
GNST	(UTC-03:00) Greenland	America/Godthab	America/Godthab	Greenland Standard Time
MVST	(UTC-03:00) Montevideo	America/Godthab	America/Montevideo	Montevideo Standard Time

NST	(UTC-03:30) Newfoundland	Newfoundland	Canada/Newfoundland	Canada/Newfoundland	Newfoundland Standard Time
PRST	(UTC-04:00) Asuncion	Asuncion	Canada/Atlantic	America/Aruba	Paraguay Standard Time
CBST	(UTC-04:00) Cuiaba	Cuiaba	Canada/Atlantic	America/Aruba	Central Brazilian Standard Time
SAWST	(UTC-04:00) Georgetown, La Paz, Manaus, San Juan	Georgetown, La Paz, Manaus, San Juan	America/Santiago	America/Santiago	SA Western Standard Time
PSAST	(UTC-04:00) Santiago	Santiago	America/Santiago	America/Santiago	Pacific SA Standard Time
VST	(UTC-04:30) Caracas	Caracas	America/Caracas	America/Caracas	Venezuela Standard Time

SAPST	(UTC-05:00) Bogota, Lima, Quito	America/Bogota	America/Bogota	SA Pacific Standard Time
EST	(UTC-05:00) Indiana (East)	US/East-Indiana	America/Halifax	US Eastern Standard Time
CAST	(UTC-06:00) Central America	America/El_Salvador	America/Mexico_City	Central America Standard Time
CST	(UTC-06:00) Guadalajara, Mexico City, Monterrey	America/Mexico_City	America/Mexico_City	Central Standard Time (Mexico)
CCST	(UTC-06:00) Saskatchewan	Canada/Saskatchewan	Canada/Saskatchewan	Canada Central Standard Time
MSTM	(UTC-07:00) Chihuahua, La Paz, Mazatlan	America/Chihuahua	America/Mazatlan	Mountain Standard Time (Mexico)

PST	(UTC-08:00) Baja California	US/Pacific	America/Los Angeles	Pacific Standard Time (Mexico)
SMST	(UTC-11:00) Samoa	Pacific/Midway	Pacific/Midway	Samoa Standard Time
BIT	(UTC-12:00) International Date Line West	Etc/GMT+12	Etc/GMT+12	Dateline Standard Time

## ADDING A CLASS

Courses can include classroom activities. If a classroom activity is added to a course, classes must be scheduled once the course is published. Upon course publishing, you will be prompted to schedule classes. You may do so by clicking the class scheduling link from the course publishing page, or by returning to the Add a Class feature at any time.

### METHODS FOR ADDING A CLASS

Using the *Add a Class* feature, you can add classes through the Calendar Tool or Create Class form. The Calendar view enables you to visualize the availability of rooms and the timing of other events as you to schedule classes.

### ROOM CONFLICT CHECKING

When adding a class, the system will verify that overlapping classes do not use the same room. If the system identifies a scheduling conflict, it will alert you. You can then either correct the conflict or ignore it and continue to save the class.

### THE PROCESS OF ADDING A CLASS

The following topics describe the process of adding a class:

- [Searching for a Class.](#)
- [Adding a Class with the Calendar View](#)
- [Adding a Class Via the Create Class Form](#)
- [Adding Instructors to a Class.](#)
- [Viewing the Calendar Tool.](#)

## ADDING A CLASS WITH THE CALENDAR VIEW

Classes can be added to the system even after they have occurred.

You can use the Calendar view to add a class immediately. You may wish to use the Calendar view to visualize the use of your resources and other scheduled classes. Either the Calendar view or the Create Class form method can be used to create classes.

When creating a class via the Calendar view, you begin by creating an initial class session. Class sessions are scheduled meetings of a class. A class may have multiple sessions with singular student registration and grading for all sessions of the class. A class must have at least one class session.

A class can include one or more sessions. Attendance and grading however, occurs at the class level, not the session level. If you wish to track attendance and grading for each session, you must create a separate class for each.

Once you've added your first class session, you will add details about the class. At that time, you can also choose to add additional class sessions.

### To add a class with the Calendar View:

1. Search for the course to which you will add the class.
2. From the *Class Management* page, click Add **New Class via Calendar**. The *Create Class* page appears with the Calendar view displayed. The calendar will display any classes currently scheduled within your institution or any subsidiary institutions. You can filter the calendar to display only classes associated with certain institutions, buildings, or rooms.
3. Using the Calendar view, navigate to the date on which you would like to add the class. Double-click the time at which you would like the class to start. The *Class Information* window opens.
4. In the **Class Name** box, change the class name, if desired.
5. In the **Class Notes** box, enter any class notes you would like the student to see.
6. Select the **All Day Event?** check box if this first class session will not have a start date or end date. You can use this if you wish to reserve a room for an entire day. When selected, you can change the start date and end date, but cannot edit the times associated with the dates.
7. In the **Start Date Time** section, enter a date or click the date selector icon to choose a date on which the class session will begin.
8. In the **Start Date Time** section, use the **Time** list to select the time the class session will start on the selected start date. If **All Day Event?** is selected, the time list will be set to 12:00 AM and will not be editable.
9. In the **End Date Time** section, enter a date or click the date selector icon to choose a date upon which the class session will end.
10. In the **End Date Time** section, use the **Time** list to select the time the class session will end on the selected end date. If **All Day Event?** is selected, the time list will be set to 11:59 PM and will not be editable.

11. In the **Time Zone** list, select the class time zone (that is, the time zone in which the class occurs). The student will see the class time, adjusted to the time zone noted on the student's record. For example: If the student record indicates Mountain Time as the student's time zone, and a class is scheduled for 10:00 a.m. Eastern Time, the student will see the class time as 8:00 a.m. (the Mountain Time equivalent). Also, time zones auto-adjust for the Daylight Savings Time, where applicable.
12. From the **Rooms** section, select the room(s) in which this class will occur. This information will be visible to students.
  - The list will display rooms based upon the filters enabled on the Calendar Tool before you double-clicked a time to add the class. If you want to see all rooms in your institution and any subsidiary institutions, select the **Load All Rooms** check box to remove the filter.
  - To add multiple rooms to this class, select a room from the list. Then click the **Add Another** link to add another list and select an additional room.
  - Click the **Delete** link to remove any room from the class.
13. Click **Continue**. The *Create Class* page opens. You can use this page to specify additional details about your class.
14. In the **Minimum Size** and **Maximum Size** boxes, change the minimum size and maximum size of the class, if desired. If a minimum size value is set, but not enough students register, class cancellation notices are NOT sent out automatically.
15. To establish a date after which registration will no longer be available, enter a number in the **Remove student "Register" option** box. If you leave this box blank, students can register for the class at any time, up to the beginning of the class.
16. To establish a date after which students will no longer be allowed to drop a class, enter a number in the **Remove student "Drop" option** box. If you leave this box blank, students can drop the class at any time, up to the beginning of the class.
17. Select the **Waitlist** check box if you wish to have a waitlist for the class.
18. In the **Schedule Access** list, select the desired registration/view access for students. Students can view only upcoming classes in the catalog. If an administrator enters a class that was held in the past, it will not appear on the upcoming class schedule. Options include:
  - **Allow Students to Register for Class:** Students can view scheduled classes and self-register for the class of their choice by clicking the **Register** link.
  - **Allow Students to View Class Schedule Only:** Students can see when classes are scheduled to occur but cannot self-register. When this option is selected, students will see the following message: *There are no classes currently scheduled for this activity, or, students have not been given access to the class schedule. Please contact your supervisor or HealthStream administrator for assistance.*

- **Do Not Show Class Schedule:** Hides all scheduled classes from student view. This is useful for class schedules managed by administrators, instructors, etc.

19. The **Instructors** box is populated by qualified instructors who were added when the class template was created. A class must have at least one instructor.

#### **ADD ADDITIONAL CLASS SESSIONS TO THE CLASS:**

The **Class Sessions** section of the page lists all sessions added to this class. Since you created this class with the Calendar Tool, your first session is already listed. You can elect to add additional sessions at this time.

20. In the lower right of the **Class Sessions** section of the page, click [  ] next to the **Add Session** button. The *Add Session* page will appear with the Calendar Tool displayed.
21. Double-click anywhere on the calendar to select a time. The *Class Information* window opens.
22. Follow steps 6 through 13 above to add details about your new class session.
23. Click **Continue** to return to the *Create Class* page. The new class session will now appear in the **Class Sessions** section.

#### **ADD RESOURCES TO ANY CLASS SESSION:**

The rooms you add to a class session will appear in the **Resources** box. You may also wish to add other resources (for example, instruction applications for simulation classes). A classroom course created at the enterprise level can utilize all rooms and resources at any institution within the organization.

24. Click **Add Resources** in the **Options** column of any class session listing. The *Browse for Resource* page appears.
25. Enter the search criteria for any resources you wish to associate with the class. Click the **Search** button to proceed with the search.
26. Select the resource and click **Continue**. You are returned to the *Create Class* page, and the selected resource(s) now appear in the **Resources** box. Repeat the steps 24 through 26 to add more resources, if needed.

#### **SAVE THE NEW CLASS:**

27. Once all class session entries for the new class have been made, click **Save** or click **Save and Add Another** if you wish to create an additional class.

#### **CONFLICT RESOLUTION**

When saving a class, the system will check for any resource conflicts. If a conflict is detected with any resource previously scheduled for use at the same time as one of your class sessions, a notification message will appear. This message will outline the issue in detail. Click **OK** to dismiss the message; you can then edit this class or the conflicting class to resolve the issue.

★ **Tips**

- Click [  ] if you want to check the spelling of class notes.
- Once the initial class session is added, additional class sessions can be added using date and time boxes on the Create Class page. It is not necessary to click [  ] and use the Calendar Tool to select session times. However, the Calendar Tool can help you visualize any room conflicts as you add class sessions.

## ADDING A CLASS VIA THE CREATE CLASS FORM

Classes can be added to the system even after they have occurred.

When using the Create Class form, you bypass the Calendar Tool add a class immediately. You may wish to use the Calendar Tool in order to visualize the use of your resources and other scheduled classes. Either the Calendar Tool or the Create Class form method can be used to create classes.

➡ **To add a class with the Create Class form:**

1. Search for the course to which you will add the class.
2. From the *Class Management* page, click **Add a New Class**. The *Create Class* page appears and includes information from the classroom template created when the course was developed.
3. In the **Class Name** box, change the class name, if desired.
4. In the **Minimum Size** and **Maximum Size** boxes, change the minimum size and maximum size of the class, if desired. If a minimum size value is set, but not enough students register, class cancellation notices are NOT sent out automatically.
5. To establish a date after which registration will no longer be available, enter a number in the **Remove student “Register” option** box. If you leave this box blank, students can register for the class at any time, up to the beginning of the class.
6. To establish a date after which students will no longer be able to drop a class, enter a number in the **Remove student “Drop” option** box. If you leave this box blank, students can drop the class at any time up to the beginning of the class.
7. Select the **Waitlist** check box if you wish to have a waitlist for the class.
8. In the **Schedule Access** list, select the desired registration/view access for students. Students can view only upcoming classes in the catalog. If an administrator enters a class that was held in the past, it will not appear on the upcoming class schedule. Options include:

- **Allow Students to Register for Class:** Students can view scheduled classes and self-register for the class of their choice by clicking the **Register** link.
- **Allow Students to View Class Schedule Only:** Students can see when classes are scheduled to occur but cannot self-register. When this option is selected, students will see the following message: *There are no classes currently scheduled for this activity, or, students have not been given access to the class schedule. Please contact your supervisor or HealthStream administrator for assistance.*
- **Do Not Show Class Schedule:** Hides all scheduled classes from student view. This is useful for class schedules managed by administrators, instructors, etc.

9. The *Instructors* box is populated by qualified instructors who were added when the class template was created. A class must have at least one instructor.

10. In the **Class Notes (to students)** box, enter any class notes you would like the student to see.

### **ADD SESSIONS TO THE CLASS**

Class sessions are scheduled meetings of a class. A class may have multiple sessions with singular student registration and grading for all sessions of the class. A class must have at least one class session.

A class can include one or more sessions. Attendance and grading however, occurs at the class level, not the session level. If you wish to track attendance and grading for each session, you must create a separate class for each.

11. In the **Class Sessions** sections of the page, enter the start date and start time, and end date (which may be the same as the start date) and end time. Pressing the TAB key will populate date of the **End Date** box to the same date as the **Start Date** box, and will populate the end time to one hour past the start time. Either can be manually adjusted as necessary by typing in values, using the Calendar Tool, or the time list. You can also click the date selector icon to select the date. In the **Time Zone** list, select the class time zone (that is, the time zone in which the class occurs). The student will see the class time, adjusted to the time zone noted on the student's record. For example: If the student record indicates Mountain Time as the student's time zone, and a class is scheduled for 10:00 a.m. Eastern Time, the student will see the class time as 8:00 a.m. (the Mountain Time equivalent). Also, time zones auto-adjust for the Daylight Savings Time, where applicable.

12. Click **Add Session**. The page refreshes, displaying the added session in the Class Sessions section.

13. Click **Add Resources**. The *Browse for Resource* page appears. A classroom course created at the enterprise level can utilize all rooms and resources at any institution within the organization.

14. Enter the search criteria for any resources you wish to associate with the class. Click the **Search** button to proceed with the search.

15. Select the resource and click **Continue**. You are returned to the *Create Class* page, and the selected resource(s) now appear in the **Resources** box. Repeat the steps 13 through 15 to add more resources, if needed.

16. To add additional sessions for the new class, click **Add Session**. Repeat steps 11 through 15 for the new session.

### SAVE THE NEW CLASS

Once all class session entries for the new class have been made, click **Save** or click **Save and Add Another** if you wish to create an additional class.

### CONFLICT RESOLUTION

When saving a class, the system will check for any resource conflicts. If a conflict is detected with any resource previously scheduled for use at the same time as one of your class sessions, a notification message will appear. This message will outline the issue in detail. Click **OK** to dismiss the message; you can then edit this class or the conflicting class to resolve the issue.

#### ★ Tips

- Click [  ] to use the Spell Check feature.
- Class sessions can be added to the class using the Calendar Tool. To do so, click [  ] next to the Add Session button. The Add Session page will appear with the Calendar Tool displayed. Double-click anywhere on the calendar to select a time. The session details window will display. Edit details about the session and click Continue to return to the Create Class page. The new session is added to the Class Sessions section.

## DOWNLOADING AN ICAL FILE WITH CLASS DETAILS

Once a class is saved, administrators and students can download a .ics format calendar file. This file allows you to add details about the scheduled class to your preferred personal calendar software, such as Microsoft Outlook, Outlook Express, iCal, or any other desktop software or web-based application that accepts the .ics file standard.

Note the following about using the .ics calendar file:

- The process for opening, saving, or accepting the .ics file in your personal calendar software depends on the software you use.
- If you are using a shared computer, the file will be added to the default calendar software on that computer. If you wish to add the file to your personal calendar, you should download it when using your personal computer.
- Downloaded calendar files are not synced with the system. If changes are made to the class session, you must download a new calendar file and delete the outdated session from your personal calendar software.

#### 🔄 To download an iCal file with class details:

1. Navigate to the *Edit Class* page for the class you wish to download to your personal calendar software. This can be accomplished via either of the following methods:
  - Double-click a class session from the *Calendar* page. Click **Continue** in the Edit Session window to display the *Edit Class* page.
  - Perform a class search. Click the name of the desired class.

2. In the **Class Sessions** section, click the **Add to My Calendar** link that appears in the **Options** column for the class session you'd like to add to your personal calendar software. Your web browser will prompt you to save or open the download.

- If you choose to open the download, your computer will search for software that accepts .ics files. The file will open as a calendar event in your default application. Save or accept the meeting to save to your personal calendar.
- If you choose to save the download, you will choose a location on your computer to save the file. You will then need to open the .ics file with your personal calendar software. Save or accept the meeting to save to your personal calendar.

### ★ Tips

As an administrator, you may wish to download a class session to your personal calendar software and then invite students to it via your organization's integrated calendar tool. This allows you, as the organizer, to change details about the event in your integrated calendar tool should you need to reschedule it – eliminating the need for students to download a new calendar file when there are schedule changes.

## ADDING INSTRUCTORS TO A CLASS

When adding a class, you must add at least one instructor. The Instructors box may be populated by qualified instructors who were added when the class template was created.

Your ability to add instructors depends on the settings given to this classroom template learning activity.

- If no Instructors were pre-selected for this classroom template learning activity, an **Add Instructor(s)** link below the Instructors box. You may click this link to search for instructors to add to the class.
- If the **Use Only Qualified Instructors** option was enabled in the properties for this class template, you will be able to clear all but one of the qualified instructor check boxes.
- If the **Use Only Qualified Instructors** option was not enabled in the properties for this class template, an **Add Instructor(s)** link below the **Instructors** box. You may click this link to search for additional instructors to add to the class.

### ➡ To select instructors from the pre-selected list of qualified instructors:

Clear the check boxes of the names of those instructors who will not teach this specific class.

### ➡ To add additional instructors (if applicable):

1. Click the **Add Instructor(s)** link below the Instructors box. The *Add Instructors* page will appear.
2. Search the organization for instructors by name, user ID, or administrator role.
3. On the search results page, select the check boxes next to the names of instructors you wish to add.
4. Click **Continue** to return to the *Create Class* page.

## OPENING THE CALENDAR VIEW

The Calendar view is used to:

- Visualize the schedule of classes in your institution and any subsidiary institution.
- Visualize the availability of rooms in institution and any subsidiary institution.
- Add new classes and class sessions.
- Edit existing classes and class sessions.

By default, the Calendar displays a single week of activity, with the current week shown. However, the timeline view can be changed to a Day, Week, or Month view.

➤ **To open the Calendar view:**

1. Click **View Calendar** from the **Education** tab. The *Calendar* page displays. Scheduled class sessions appear as colored blocks.
2. Hover your cursor over any scheduled class to view details about that class session.

➤ **To change the timeline view of the Calendar view:**

By default, the Calendar displays a single week of activity, with the current week in focus. However, the timeline view can be changed to a Day, Week, or Month view.

1. Click **Day**, **Week**, or **Month** in the upper right corner of the Calendar to change the timeline view.
2. Use the arrows in the upper left corner of the Calendar to display a different time frame related to the selected timeline view.
3. Click **today** to return to the focus of the Calendar to today's date.



4. Alternatively, use the navigation calendar on the left side of the page to select a different date.
  - Click any date in this calendar to change the focus of the Calendar view, related to the selected timeline view.
  - Use the single arrows in the header to skip by month.
  - Use the double arrows in the header to skip by three months.

December 2011						
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

- When using the **Week** or **Day** timeline view, the Calendar will default to display hours between 8 AM and 6 PM. Click Show **24 hours...** in the lower left to change to a 24 hour view. Click **Show business hours...** to return to the default view.

### ➔ To filter the Calendar by institution, building, and room:

By default, the Calendar will display scheduled class sessions for all rooms and building in your institution and subsidiary institutions. However, you can filter the calendar to display only institutions, building, and rooms of your choosing.

- In the filter section on the left side of the page, click the arrow next to the institution name to display any subsidiary institutions or buildings.
- If available, click the arrows of any subsidiary institutions or buildings to show buildings or rooms that added beneath them.
- Select the check boxes for only the institutions, building, and/or rooms you wish to display on the calendar.
- Select the **Show classes with no rooms** check box to include scheduled classes that are not associated with a room.
- Click the **Update Calendar** button. The Calendar refreshes to display only items that match your filters. The filters are reset when you navigate away from the Calendar page.

## DESIGNATING A RECORDED VIRTUAL CLASS FOR STUDENT SELF-REGISTRATION

If your organization's web meeting system supports recordings, students can be permitted to self-register for a previous virtual class and view the recording (either as an alternative to, or in absence of, an upcoming virtual class live event).

The system supports access to server-based virtual class recordings via the following products:

- Cisco WebEx
- Microsoft LiveMeeting

- Saba Centra

Whenever one or more virtual classes have the **Record this class?** check box selected, the latest (most recently completed) virtual class will appear on the **Class Schedule** for students. This will appear below any upcoming classes on the schedule in a section labeled **Recorded Class**. If none of the virtual classes have the **Record this class?** check box selected, then the **Recorded Class** option will not be displayed.

Students may register for the recorded class by selecting either **Session I Recording** or **Register and View** in the **Recorded Class** section.

**Note:** Recorded classes ignore the **Waitlist** and the **Schedule Access** settings. If the recorded class happens to be full, the class will appear on the schedule as FULL. If the class is set up with a waitlist, the student cannot be added to it. Recordings will appear on the **Class Schedule** for student self-registration even if **Schedule Access** is set to Allow students to view class schedule only or Do not show class schedule. If you do not need a recorded class to be available for student enrollment, clear the **Record this Class** check box.

Once a student clicks either link they will be registered for the class and the recording will open in a new window.

To complete the recorded class, the student must be graded for the class by an administrator. Until then, they will appear as **In Progress** on the course and registered in the class.

To prevent students from having a **Recorded Class** option on the class schedule for a particular course, all virtual classes that have been recorded must have the **Record this class?** setting cleared. Students who attended the virtual class will still be able to access the recording from their *My Transcript* page as long as the recording remains on the web meeting provider's server.

★ **Tips**

If there is a need to designate an older recorded virtual class as the recorded class for which students may register, then the more recent recorded virtual class (or classes) will need to have the **Record this class?** check box cleared. Students who attended a live virtual class that was recorded will retain access to their specific session's recording through the *My Transcript* page, even after the check box has been cleared.

## ADDING A VIRTUAL CLASS

When adding a virtual class, you will follow the same process as adding a class through the Create Class form. However, the *Create Class* page may present additional options, depending on your web-based conference/meeting software. These options include **Record this Class (Available from transcript)** and **Passcode**.

Note that only web meeting platform can be implemented for an entire organization.

<b>Supported Web-Based Conference Meeting Software</b>			
<b>Meeting Software</b>	<b>Record this Class Support</b>	<b>Passcode Option Support</b>	<b>Instructors Per Class</b>
Centra	Yes	Yes	Several

WebEx	No  This platform supports recording the meeting to a local PC only and requires manual configuration using its own system options	Yes	Several
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### THE RECORD THIS CLASS OPTION

Select the **Record this Class (Available from transcript)** check box if you want your web meeting software to record the audio and video of the virtual class. When selected, students who attend the class will be able to access the recording from their transcript.

If you select the **Students may register for the recorded version of the class**, the most recently recorded class will appear on the class schedule as a self-register option, allowing students to view the recorded class in lieu of attending a live virtual class.

Online recordings are stored on the web meeting software's servers, not on HealthStream's servers. Depending upon your license agreement with your web meeting software's vendor, recordings may remain for a limited time only (for example, one year). The system does not automatically remove links to recordings that are no longer available.

### THE PASSCODE OPTION

If the virtual class requires a passcode, type it in the **Passcode (If event is invitation only)** box. Otherwise, leave the box blank. If you specify a passcode, students will be required to enter it when they register for the virtual class. Students do NOT have to enter a passcode to watch a recorded class.

## SEARCHING FOR A CLASS

When searching for a class, keep in mind that the default search is for visible classes. You can also filter your search by grading status. Selecting the **Grading Complete for This Class** check box when grading a class automatically moves the class to *Hidden* status.

Only the current organizational level and below will be searched.

### ➔ To search for a class:

1. On the **Education** tab, click **Manage Classes**. The *Search for Classes* page appears. **Note:** You may also click the *Most Recently Edited* icon to the right of the **Manage Classes** link to view and access direct links to the 10 most recently edited classes.
2. Enter desired search criteria. By default only the current organizational level and below will be searched for classes. To look for classes above the current level in the organizational hierarchy deselect all the affiliations. To look for a class at a particular level in the organizational hierarchy, click **Search Affiliations** and select

the affiliations in which you wish to search for classes. **Note:** You may also filter your search by **Grading Status:** Any, Grading Complete (Hidden) or Grading Not Complete (Visible). Selecting the **Grading Complete for This Class** check box when grading a class automatically moves the class to Hidden status.

3. Click **Search**. A list of all classes meeting your specified search criteria will appear.

to edit a class, including class details and session information, access the class for the **Manage Courses** link.

Additionally, you can edit specific class sessions directly from the Calendar Tool. This process, however, does not allow you to make changes to class details or display a list of all sessions within a class.

#### **To edit a class:**

1. Perform a class search.
2. Click the name link of the desired class. The *Edit Class* page appears.
3. Make desired edits.
4. Click **Save** to save the changes or click **Save and Add Another** if you wish to add an additional new class.

### **CONFLICT RESOLUTION**

When saving edits to a class, the system will check for any resource conflicts. If a conflict is detected with any resource previously scheduled for use at the same time as one of your class sessions, a notification message will appear. This message will outline the issue in detail. Click **OK** to dismiss the message; you can then edit this class or the conflicting class to resolve the issue.

### **EDITS AND DOWNLOADED CALENDAR FILES**

When editing class session times, it is important to note that your changes are not synced to calendar files that you or any students have downloaded to their personal calendar software. Additionally, the student is not notified of a class session change. Class changes must be communicated through some external means, such as e-mail or telephone.

Downloading a calendar file for the edited class session will create a completely new calendar entry in personal calendar software. The outdated entry will remain unless manually deleted.

#### **Tips**

After students have registered or have been registered for the class, the Roster icon is visible at the top of the screen. When clicked, it pre-configures the Class Roster and Sign-In Sheet report with the selected class.

## **EDITING A CLASS SESSION WITH THE CALENDAR VIEW**

You can edit class sessions directly from the Calendar view. Using this view gives you visibility into potential scheduling conflicts and room use.

However, if you wish to edit class details or view a list of all class session with a single class, you should edit the class itself.

## To edit a class session with the Calendar View:

1. Click **View Calendar** from the **Education** tab. The *Calendar* view displays.
2. Navigate the calendar to locate the class session you wish to edit. Edit the class session using one of the following methods:
  - Click and drag the class session from the scheduled time slot to any other time slot on the calendar. When you release the mouse button at your desired new location, a confirmation message will appear. Click **OK** to confirm your change, or click **Cancel** to discard the change. If you confirm the change, the class session Start Date/Time and End Date/Time are changed.
  - When in Day or Week timeline view, click the bottom of the event block and drag it down to extend the length of the event. When you release the mouse button, a confirmation message will appear. Click **OK** to confirm your change, or click **Cancel** to discard the change. If you confirm the change, the class session End Date/Time is changed.
  - Double-click any class session to open the *Edit Session* window. Make edits and click **Continue**. You are taken to the *Edit Class* page, where you can make further edits to other sessions or the class details. Click **Save** to save your changes.

## CONFLICT RESOLUTION

When saving edits to a class, the system will check for any resource conflicts .If a conflict is detected with any resource previously scheduled for use at the same time as one of your class sessions, a notification message will appear. This message will outline the issue in detail. Click **OK** to dismiss the message; you can then edit this class or the conflicting class to resolve the issue.

## EDITS AND DOWNLOADED CALENDAR FILES

When editing class session times, it is important to note that your changes are not synced to calendar files that you or any students have downloaded to their personal calendar software. Additionally, the student is not notified of a class session change. Class changes must be communicated through some external means, such as e-mail or telephone.

Downloading a calendar file for the edited class session will create a completely new calendar entry in personal calendar software. The outdated entry will remain unless manually deleted.

## ★ Tips

After students have registered or have been registered for the class, the Roster icon is visible at the top of the screen. When clicked, it pre-configures the Class Roster and Sign-In Sheet report with the selected class.

## REGISTERING STUDENTS FOR A CLASS

If you wish to have certain students attend a specific class, you may register them for the class. You may do so if the student has been assigned the course. You can also register unassigned students.

**Note:** *Registering a student for a class enrolls the student in the associated course (if they are not already enrolled). The course enrollment will appear as elective learning. If the associated course is part of a non-sequential curriculum that has been assigned to a student, or in which the student has self-enrolled, the registration will be associated with the course within the curriculum.*

Student registration becomes enabled when a class is added. You can register students as soon as a new class is saved, or return to the class at a later time to access the **Registration** link.

 **To register students for a class:**

1. Save a new class or search for an existing class.
2. On the *Edit Class* page, or from the return search page, click **Register**. The *Register Students* page appears.

From here you can register individual students or register students using student groups.

**TO REGISTER INDIVIDUAL STUDENTS**

1. Perform a student search. A listing of all students matching your search criteria appears.
2. Select the check box(es) to the left of the students' names you wish to register for the class, or click **Check All Current Search Results**.
3. Click **Continue**. A confirmation of all selected students appears. To alter your student selections, click **Return** and perform a new student search.
4. Click **Register**. The registration request is submitted to Request Manager.
5. To add more students to the registration list, click **Manage Registrations**. The *Manage Student Registrations* page appears.
6. Click **Register** and follow the instructions above.

**TO REGISTER STUDENTS USING STUDENT GROUPS**

1. On the student search page, click **Advanced Search**. The advanced search options on the *Manage Students* page displays.
2. Click **Search Student Groups**. The *Search Student Groups* page appears.
3. Perform a student group search. A list of matching student groups appears.
4. Select the check box(es) to the left of the student groups you wish to register for the class.
5. Click **Select**. The advanced search page appears with the student groups that you selected now checked in the **Student Group** box.
6. Click **Search**. A listing of students from the selected student groups appears.
7. Select the check box(es) to the left of the students' names you wish to register for the class, or click **Check All Current Search Results**.
8. Click **Continue**. A confirmation of all selected students appears. To alter your student selections, click **Return** and perform a new student search.
9. Click **Register**. The registration request is submitted to Request Manager.

10. To add more students to the registration list, click **Manage Registrations**. The *Manage Student Registrations* page appears.

11. Click **Register** and follow the instructions above.

### ★ Tips

- After students have registered or have been registered for the class, the Roster icon is visible at the top of the screen. When clicked, it pre-configures the Class Roster and Sign-In Sheet report with the selected class.

## MANAGING CLASS REGISTRATIONS

### To access a list of registered students:

1. Perform a class search.
2. Click **Manage Registrations** from either the search return page or by clicking the name link of the class to access the *Edit Class* page. A listing of all registered students appears. A waitlist may also appear at the bottom of the page.

### TO REGISTER ADDITIONAL STUDENTS

(You can register students even after the class has occurred.)

Click **Register** and follow the procedure to register students for class.

### TO DROP A STUDENT FROM THE CLASS

Select the check box(es) to the right of the student's name in the **Drop** column, then select one of the following two options:

- Click **Drop from Class** if you wish to remove the student from the active class roster but keep the student enrolled in the course.
- Click **Drop and Un-enroll From Course** if you wish to remove the student from the class roster and un-enroll him or her from the course

Dropping a student from a completed class may affect student course completions. For example:

- A course contains a single classroom learning activity.
- A student completes the classroom activity and therefore completes the course.
- The student is subsequently dropped from the completed class.
- The class completion is removed, as is the course completion. The course is removed from the student's transcript. If the course was originally assigned, it will reappear as assigned learning (unless the due date has passed, in which case the assignment's due date/end date rules apply). If the course was elective or enrolled, it returns as elective learning.

- If the course completion was bridged to any curricula or equivalents whether they are in progress or completed, they will be re-evaluated. It is possible for completed curricula and equivalents to return to a student's *assignment* list for completion when a course completion has been deleted.

★ **Tips**

- After students have registered or have been registered for the class, the Roster icon is visible at the top of the screen. When clicked, it pre-configures the Class Roster and Sign-In Sheet report with the selected class.

## MANAGING A WAITLIST

When scheduling a class, you may choose to add a waitlist for class registration. If a waitlist is added, it will appear at the bottom of the class registration page, and will populate when more students are registered for or have self-enrolled in the class than the maximum class capacity allows. Students who are waitlisted will see the *Waitlisted* designation next to the class name where their learning items are displayed.

**Note:** *When an administrator registers several students at once, students will move to the active roster in alphabetical order. Once the roster is filled, the remaining students will appear in alphabetical order on the waitlist. Subsequently registered students will appear at the bottom of the waitlist, and will be moved from the top of the waitlist to the active roster as space becomes available. When students register themselves for a full class that has a waitlist, they are added to the waitlist in the order that they register for the class.*

➡ **To access the waitlist:**

1. Perform a class search.
2. Click **Manage Registrations** from either the search return page or by clicking the name link of the class to access the **Edit Class** page. A listing of all registered students appears. A waitlist appears at the bottom of the page.

### **TO REPLACE A STUDENT FROM THE ROSTER WITH THE STUDENT AT THE TOP OF THE WAITLIST**

1. Select the check box(es) in the **Drop** column to the right of the student's name on the active roster.
2. Click either **Drop From Class** or **Drop and Un-enroll From Course**. The student will be removed from the active roster, and the student previously at the top of the waitlist will be moved onto the roster and will appear in alphabetical order.

### **TO REMOVE A STUDENT FROM THE WAITLIST**

1. Select the check box(es) in the **Remove** column to the right of the student's name on the waitlist.
2. Click **Remove**.

### **TO FORCE A STUDENT FROM THE WAITLIST ONTO THE ACTIVE ROSTER**

Forcing students onto the active roster permanently increases the maximum class capacity.

1. Select the check box(es) in the **Force** column to the right of the student's name on the waitlist.

2. Click **Force**. The student will be moved onto the active roster and will appear in alphabetical order.

### ★ Tips

- After students have registered or have been registered for the class, the Roster icon is visible at the top of the screen. When clicked, it pre-configures the Class Roster and Sign-In Sheet report with the selected class.

## GRADING A CLASS

In addition to administrators, instructors can grade classes.

Once a class start date and time has arrived, the **Grade** link becomes available. Classes must be graded for the system to give students credit for successful class completion.

*Note: Prior to grading a class, review the class learning activity **Completion Mode** and **No Show** option.*

### ➡ To grade a class:

1. Perform a class search.
2. Click the **Grade** link to the right of the class you wish to grade. The *Grade Students* page appears, including a list of students who were registered for the class.
3. Select **Grading Complete for This Class**. This will hide the graded class from routine class searches. Hidden classes are, however, always retrievable.
4. Select the desired class grade status for each student. **Note:** *If a class learning activity is Pass Required, a percent grade must be entered that is equal to or greater than the Minimum Passing Score for the class. Selecting the **Passed** check box alone does not meet the completion mode passing requirement. If **Passed** is selected, but the score entered is less than the required minimum, the student fails the class and the course.*
  - **No Show:** Student did not attend or complete the class (see information below)
  - **Attended:** Student was present at class (required for a Completion Required class learning activity)
  - **Passed:** Student attended and achieved a defined outcome for the class
  - **Grade:** Student attained a specific grade for the class. A grade must be added if the class learning activity is *Pass Required*, includes a minimum passing score, or has an assigned score percent weight.
5. Click **Save**.

**Note:** *You can add and grade more students for a class after the class has taken place (for instance, walk-ins) by registering and then grading the additional students.*

### NO SHOW GRADING

Grading a student as *No Show* has implications based upon the class learning activity completion mode and the no show rule selected on the class learning activity *Common Properties* page.

Key points:

- If a class learning activity completion mode is *Not Required*, students complete the class by default, regardless of the associated no show rule. No grading is needed.
- If the class learning activity completion mode is *Completion Required* or *Pass Required*, and the no show rule is *Student Fails the Course*, students graded as *No Show* will fail the class and fail the course. If the course was assigned, it will be reassigned and all learning activities will require completion, including those already completed in the failed course. If the course was elective, the student may choose to re-enroll.
- If the class learning activity completion mode is *Completion Required* or *Pass Required*, and the no show rule is *Student is Incomplete*, students graded as *No Show* will be unable to proceed through the course. The student is unable to select another class however, the student does not have to retake previous learning activities. The course does not fail and does not have to be re-assigned or re-enrolled in. To enable students to attend a subsequent class and continue through the course, do not grade the student as *No Show*. Drop the student from the missed class using the Manage Registrations feature. This will allow for student registration into another class.
- Students graded as *No Show* will appear on the No Show report for that class. If the grade status is changed to *Passed* or *Attended* or if the student is dropped from the class, students will be removed from the No Show report.
- If the *No Show* grade results in course failure (see second bullet above), the student's course failure will appear on the Failed Courses report.

**Note:** Class grading can be changed at any time (for example, from *No Show* to *Attended* or *Passed*). Consider how changing a class grade will impact the student's course and report statuses.

★ **Tips**

- After students have registered or have been registered for the class, the Roster icon is visible at the top of the screen. When clicked, it pre-configures the Class Roster and Sign-In Sheet report with the selected class.

## COPYING A CLASS

If you wish to offer a class more than once, you can use the class copy feature to create the additional classes.

**Note:** Student registrations and waitlists from the original class are not copied.

🔄 **To copy a class:**

1. Perform a class search.
2. Click **Manage Registrations** from either the search return page or by clicking the name link of the class to access the *Edit Class* page. A listing of all registered students appears. A waitlist may also appear at the bottom of the page.

3. Click **Copy** from the class search return or the **Edit Class** page. An exact copy of the original class appears, with the name of the class changed to *[Original Class Name] Copy* on the *Add Class* page.
4. Edit class information as needed. For instance, you may clear the instructor listed for the original class and replace with a new instructor by clicking the **Add Instructors** link and performing an instructor search.
5. Click **Edit** to edit the class sessions, changing the start and end dates to the dates for the new class. You may also edit start and end times, if needed. You may also edit start and end times, if needed.
6. Click **Update**.
7. Clear the check box(es) next to resources that will not be needed for the new class.
8. Click **Add Resources** to select resources for the new class.
9. Perform a resource search. A listing of resources matching your search criteria appears.
10. Select the check box(es) beside the desired resource(s).
11. Click **Continue**. The new resources will appear in the **Resources** box.
12. Click **Save** to save the class copy. If students are given full access to register for classes, they can select from all available classes created by copying the original class.

## CANCELING A CLASS

See [Deleting a Class](#).

## DELETING A CLASS

### To delete a class:

1. Perform a class search.
2. Click the name of the desired class. The *Edit Class* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the class.

Deleting a class may affect student course completions. For example:

- A course contains a single classroom learning activity.
- A student completes the classroom activity and therefore completes the course.
- The class the student completed is subsequently deleted.

- The class completion is removed, as is the course completion. The course is removed from the student's transcript. If the course was originally assigned, it will reappear as assigned learning (unless the due date has passed, in which case the assignment's due date/end date rules apply). If the course was elective or enrolled, it returns as elective learning.
- If the course completion was bridged to any curricula or equivalents whether they are in-progress or completed, they will be re-evaluated. It is possible for completed curricula and equivalents to return to a student's assignment list when a course completion has been deleted.

# Courses

## COURSES

### COURSES OVERVIEW

Courses consist of one or more learning activities. Students may be required to complete all of the learning activities to receive credit for the course; it is possible, however, for a learning activity to be optional. Administrators can assign courses to students. Students can also enroll themselves in courses from the **Catalog** or **CE Center** tab.

Many of the courses available in the HLC are developed by HealthStream or by third-party vendors. Administrators, however, can develop their own courses to meet the needs of their organization.

#### DEFINITIONS

##### Learning Activity

A single educational component within a course. Learning activities that can be added to an administrator-developed course include:

- Authored learning activities
- Course attachments
- Classroom activities
- Virtual class activities
- Tests
- Evaluations

**Note:** *Completion reports are based upon completion of an entire course, not on individual learning activities.*

### DEVELOPING A COURSE

Before developing a course, the administrator should consider the overall course construction, and determine what pre-work is necessary before course development begins. Pre-work may include:

- Making sure the appropriate course categories are available in the system.
- Determining the types of learning activities that will be included.
- Adding buildings, rooms and resources if the course will include classroom activities
- Entering continuing education (CE) accreditation information into the system if CE credit will be applied to the course.
- Creating authored HTML or SCORM content if online content will be included in the course.
- Developing a custom certificate as your organization's default certificate of completion.

Once all pre-work has been completed, you are ready to add your administrator-developed course.

## COURSE CONFIGURATION TOOL

Use the Course Configuration Tool to explore common course configurations or address the decision points in creating a custom course configuration. See the Course Configuration Tool topic for more information on this feature.

## ADDING A COURSE

### To add a course:

**Note:** Course title, description, learning objectives, author, author biography, course outline, and technical requirements will be visible to students on the Course Overview page.

1. On the **Courses** tab, click **Add a Course**. The *Add a Course* page appears.
2. In the **Course Title** box, enter the title of the course.
3. In the **Description** text area, enter a description of the course. This will be visible to students.
4. In the **Learning Objectives** text area, enter the learning objectives of the course.
5. Click **Select Course Categories** to choose default course categories. The *Category Selection* page appears.
6. Select the check box(es) next to one or more categories. Subcategories will be revealed, if available, by clicking the + to the left of a category name.
7. Click **Select**. The system returns you to the *Add a Course* page with the categories you selected in the **Default Categories** box.
8. In the **Default Certificate** list, select the certificate you want students to receive upon completing the course. **Note:** *The certificate template selected as the course default is the certificate all students will receive for course completion, regardless of whether or not they qualify for any CE credit associated with the course. Select either the HealthStream default or another default (non-CE) certificate as the course default. If CE credit is associated with the course, those students qualifying for the CE credit will receive both the default certificate and the appropriate CE certificate.*
9. In the **Development Status** list, select the course status. **Note:** *Development status can assist administrators in managing course development work. Update of development status may be required to allow certain administrator roles (for example, Education Office Assistant) to publish a completed course.*
10. Leave the **Learning Activities completed sequentially** check box selected if you want students to be required to complete learning activities sequentially. This selection prevents students from completing learning activities in random order. They can only access a learning activity after previous activities are completed. If cleared, students can complete learning activities in any order they choose.

11. Click **Additional Properties** to reveal the following additional, optional course properties.

- In the **Course Identifier** box, enter additional information with which to identify the course. The course identifier does not have to be unique.
- Do not enter a value into the **Course Fee**, **No Show Fee**, and **Cancel Fee** boxes unless you have a PayPal account that is linked to the system for payment processing. If you add a course fee, the student will be presented with an online billing wizard requesting credit card payment.
- In the **Next Review Date** box, enter the date on which the course should next be reviewed.
- In the **Inactivation Date** box, enter the date on which the course will be inactivated. If you add an inactivation date, then when that date arrives, the course will no longer be available for assignment or enrollment. If the course was previously assigned, it will remain on students' To-Do List but they will not be able to complete it. Courses approaching an inactivation date will display a warning to students who access the course that the course is about to expire. **Note:** *If you enter an inactivation date, the course will appear on the Expiring Courses report.*
- In the **Keywords** text area, enter all words that may be used to assist students and administrators in course searches. Be sure to separate each keyword with a comma.
- In the **Author** and **Author Biography** text areas, enter specific author/developer information. This information will be visible to students.
- In the **Course Outline** text area, enter a course outline. Text can be added and edited to an outline or bullet format.
- In the **Technical Requirements** text area, enter any other information that you may want to communicate to students.

12. Click **Save**. The *Course Builder* workspace appears. Learning activities can now be added to the course.

### ★ Tips

- Click [  ] to use the Spell Check feature.
- Click [  ] to select a date.

## COMPLETION MODE

When entering the common properties of each course learning activity, you must determine the completion mode for the activity. Completion mode options include:

- **Not Required:** Students do not have to complete the learning activity to successfully complete the course.

- **Completion Required:** Students must complete the learning activity, but are not required to meet a specific requirement to move on to other activities or to complete the course. This option should be selected for a test that will serve as a pre-assessment (PA) exam.

- **Pass Required:** Students must complete the learning activity and must meet or exceed the minimum passing score or they will fail the learning activity and fail the course. This option is not available for evaluation, course attachment, or authored learning activities. Students who fail a course will see the following message:

*You have failed this course:*

- *If it is assigned, you are required to re-take the course until either you pass the course or the due date passes. Click the My Learning tab to continue.*

- *If you self-enrolled, you may re-enroll in the course from the Catalog tab. If you did not self-enroll, contact your HLC administrator for further assistance.*

The Course Configuration Tool can help you explore the implication of Completion Mode on the learning activities within your course.

### **EXAMPLES OF COMPLETION MODE APPLICATIONS**

When a learning activity is part of a course, but not essential to the overall goals of the course, it may be marked *Not Required*. For example, an optional pre-test may be included in a course for students who wish to test their current knowledge of the course content prior to engaging in the other learning activities.

When a learning activity is necessary for successful course completion, it will be marked *Completion Required*. This completion mode is most appropriate for authored learning activities (online content) where passing cannot be measured. An evaluation within a course that is required for course completion should also be given this designation.

*Pass Required* will be used when the student must meet a minimum score to proceed through or complete the course. *Pass Required* can be used for tests or classroom activities. Tests are graded by the system to immediately determine if the designated minimum passing score was met. Classes must be graded by the instructor or administrator after the classroom activity has occurred.

If you select the *Pass Required* option, you must enter a minimum passing score on the learning activity's common properties page. The minimum passing score must be a number.

### **COMPLETION MODE IMPACT ON COURSE COMPLETION**

The following scenarios outline common uses of completion mode, and the impact of each on course completion.

#### **Scenario 1**

A test marked *Completion Required* with a designated minimum passing score will allow a student to take the test up to the maximum number of test attempts to reach the minimum passing score. If the minimum passing score is not achieved within the maximum number of attempts, the student will no longer be able to access the test, but will be able to move on through the other learning activities within the course. If the **Meeting minimum passing score will immediately pass the course** check box is selected, and the student meets or exceeds the minimum passing score, the student will pass the entire course (test out) and will not have to complete the other learning activities within the course.

#### **Scenario 2**

A test marked *Pass Required* with a designated minimum passing score will allow a student to take the test up to the maximum number of test attempts to reach the minimum passing score. If the minimum passing score is not achieved within the maximum number of attempts, the student fails the test and therefore fails the course. If the course was

assigned, he or she will be unenrolled and re-assigned the course (if the due date has not yet passed or the course is part of a recurring assignment) and must repeat all learning activities.

**Note:** Administrators can also directly enroll students in a course with a pre-test or post-test by registering them for a class that is in the course. If the student fails the course they are no longer enrolled.

### Scenario 3

A class marked *Completion Required* with a designated minimum passing score will be satisfied if the student is graded as having attended and a score is entered (whether or not the minimum passing score is met). If the **Meeting minimum passing score will immediately pass the course** check box is selected for the class, and if the student meets or exceeds the minimum passing score, once graded, the student will pass the entire course and will not have to complete the other learning activities within the course.

### Scenario 4

A class marked *Pass Required* with a designated minimum passing score will be satisfied if the student is graded as having passed, achieving the minimum passing score. If the student is marked as *Attended*, and the score does not meet the minimum requirement, the student fails the class and the course. If the course was assigned, he or she will be un-enrolled and re-enrolled from the course (if the due date has not yet passed or the course is part of a recurring assignment) and must repeat all learning activities.

**Note:** Administrators can also directly enroll students in a course by registering them for a class that is in the course. If the student fails the course they are no longer enrolled.

## ADDING CE CREDIT TO A COURSE

Continuing education (CE) credit can be added to administrator-developed courses, if the organization is accredited or approved to do so, using the optional CE Credit Management functionality.

Compliance with CE accreditation or approving body rules and regulations is the customer's responsibility. HealthStream strongly recommends involving those within your organization who have expertise in and responsibility for your continuing education program(s) if you choose to utilize the CE Credit Management functionality.

Carefully review the information in the CE Credit Management section of the Help system prior to utilizing this feature.

Prior to adding CE credit to a course, the accreditation/approval must be set up in the system.

### To add CE credit to a course:

1. Search for the course to which you want to add CE credit. The Course Builder page appears.
2. Click **Manage Course CE Credit**. The *Manage Course CE Credit* page appears.
3. Click **Add Course CE Credit**. The *Add Course CE Credit* page appears.
4. In the **Accredited/Approved** list, select a provider.
5. In the **Credit Units** box, enter the number of credit units.
6. Leave the **Show certificate upon completion** check box selected unless you do not want students to receive a CE certificate.

7. In the **Initial Date** box, enter the initial date of course CE approval. Prior to this date, no CE credit will be issued for course completion.
8. In the **Expiration Date** box, enter the expiration date of course CE issuance. After this date, no further CE credit will be issued for course completion.
9. In the **Course Level Accreditation/Approval Statement** text area, add a statement, if desired.
10. Click **Save**.
11. To add another type of CE credit, click **Back to Course CE Credits**.
12. Click **Add Course CE Credit** and repeat Steps 4 - 10.

**Note:** If CE credit is added to a course that has already been published, you must republish the course to activate the CE credit.

★ **Tips**

- Click [  ] to select the date.

## PREVIEWING A COURSE

Once course development is complete, you can preview the course. The preview will display the course as students will see it.

➡ **To preview a course:**

1. Search for the course that you want to preview. The *Course Builder* page appears.
2. Click **Preview**. The *Course Details* page appears.

Learning activities appear at the top of the page. If the course was developed for learning activities to be completed sequentially, only the first learning activity is enabled. CE credit applied to the course appears at the bottom of the page. Click the **X** in the upper right of the page to close the preview.

## PUBLISHING A COURSE

**Things to remember when publishing a course:**

- Publishing makes a course available for assignment, or, if desired, to be elected by students from the **Catalog** tab.
- If you are publishing a course that includes a test, you must specify the number of questions to include from at least one question group. If you do not, the course publishing request will fail. See [Editing Test Question Group Settings](#).
- Once a course is published, you cannot add, delete or rearrange learning activities within the course.

- Quick Publish allows the course to be published to the entire institution using a common set of publishing properties. Advanced Publish allows publishing properties to be customized for specific subsidiary affiliations.

### ➔ To publish a course:

1. Search for the course that you want to publish. The *Course Builder* page appears.
2. Click **Publish**. The *Publish* page appears.
3. In the **Course Development Status** list, select the development status of the course (this is suggested, but not required).
4. You can now choose between *Quick Publish* or *Advanced Publish*. Quick Publish allows the course to be published to the entire institution using a common set of publishing properties. Advanced Publish allows publishing properties to be customized for specific subsidiary affiliations.

### USING QUICK PUBLISH

If you wish to publish the course to the entire institution using a common set of publishing properties, use the Quick Publish feature:

1. Leave the **This course can be used by subsidiary affiliations** check box selected if you want the course to be available for use by administrators in subsidiary affiliations with access to course building or assignments features.
2. Leave the **This course can be used for enrollment (assignment and/or class registration)** check box selected if you want the course to be available for administrator delivery to students via group or individual assignment or by class registration.
3. Leave the **This course can be used with Learning Events** check box selected if you want course completion to be satisfied by a learning event.
4. Leave the **This course can be used in Reports** check box selected if you want the course available for inclusion in reports.
5. Leave the **Students may self-enroll from the Catalog tab** check box selected if you want the course available to be taken as an elective.
6. Leave the **This version is the active version of this course at the selected affiliation(s)** check box selected if you want the course to be active in the system.
7. Select the **Un-enroll and re-enroll students that are currently enrolled but have not completed any version of this course** check box if you want the system to un-enroll and re-enroll students when publishing subsequent course versions. **Note:** *If you choose to un-enroll and re-enroll students who are already enrolled in the course, then students will be required to repeat all previously completed learning activities within the course and students will be dropped from all classes within the course for which they were previously registered.*

8. Select the **Add this course to the Courseware Exchange** check box to share this course including any authored online activities, tests, and evaluations within the course with other customers through the Courseware Exchange. Classroom activities will not be shared. **Note:** *If you have the ADAM Pro Resource library and you have used ADAM assets within your online content, you should select the Pro Resource Exchange instead of the Courseware Exchange Community. This allows you to share your course with other ADAM subscribers. Note: If your organization has access to a private exchange, check boxes will appear upon selecting the **Add this Course to the Courseware Exchange** check box. Enable the check boxes for each exchange to which you will share your course.*
9. Click **Quick Publish**. A warning page appears.
10. Click **Confirm**. A course publish request is submitted.
11. To view the status of your publish request, click **Go to Request Manager**.

### **USING ADVANCED PUBLISH**

If you wish to publish a course to specific subsidiary affiliations only, or if you wish to customize the publish settings for subsidiary affiliations, use the Advanced Publish feature:

1. Click **Advanced Publish**. A warning page appears.
2. Click **Add Affiliations to Receive Course**. The *Find affiliation(s)* page appears.
3. Search your organizational hierarchy for the desired subsidiary affiliation(s) using alphabetical, word search, or hierarchy search.
4. Click **Search**. The search results appear in the Search Results box.
5. In the search results box, select the check box(es) next to the name(s) of the subsidiary affiliation(s) to which you wish to publish.
6. Click **Select**. The selected affiliations will appear in the hierarchy tree on the left.
7. Click the name link of each affiliation. In addition to the standard publishing settings (see **Quick Publish**), you may also choose the following:
  - **Go Live Date:** the date in which the course becomes available for the selected affiliation.
  - **Inactivation Date:** The date at which the course is no longer available.
  - **Course Fee, No Show Fee, and Cancel Fee:** fees applied to the course. **Note:** **Course Fee, No Show Fee, and Cancel Fee** should not be added unless the customer has a PayPal account that is linked to the system for payment processing. *If a course fee is added, the student will be presented with an online billing wizard requesting credit card payment.*
8. Click **Save Settings**. A warning page appears.
9. Click **Continue**. A course publish request is submitted, as shown below.

10. To view the status of your publish request, click **Go to Request Manager**.

### VIEWING CURRENT PUBLISHING SETTINGS FOR A COURSE

You may wish to review publishing settings for an existing course to make changes. By initiating the republishing process, you can review current settings and make changes or cancel the process to leave settings as they are.

1. Search for the course. The *Course Builder* page appears.
2. Click **Publish**. The next screen allows you to select publishing options.
3. Click **Republish**. The Course Builder Publishing Details screen appears.
4. A list of institutions with published instances of the course will appear on the left side of the screen. Click the name of the instance you would like to review. The current settings will appear on the right side of the screen for you to confirm or edit.

#### If you do not wish to make changes to the publishing settings

Click **Return to Course**. Any changes made are discarded and the publishing settings are not altered.

#### If you wish to make changes to the current publishing settings

1. Make your changes. See Using Advanced Publish for more detail.
2. Click **Save Settings**.
3. Click **Continue** to complete the publishing process.

### VIEWING A COURSE'S PUBLISHING HISTORY

#### To view a course's publishing history:

1. Search for the course whose history you want to view. See Searching for a Course.
2. From the search results, click the course's name to open the course builder.
3. From the **Additional Options for this Course** section, click the **View Publish History** link to open the Course Publish History page in a new browser window.
4. To see the publishing details for a specific publish attempt, click its link in the **Publish Type** column.

### REPUBLISHING A COURSE

If edits are made to a published course, the course must be republished to activate the changes. Republishing a course publishes it using the same settings that were used the last time that the course was published.

#### To republish a course:

1. Search for the course that you want to republish. The *Course Builder* page appears.

2. Make the desired edits to the course or learning activities.
3. Click **Publish**. The *Publish* page appears.
4. Click **Republish**. A warning page appears.
5. Click **Continue**. If you choose, you can use the **Quick Publish** or **Advanced Publish** options to change the publish settings for the course.

## SEARCHING FOR A COURSE

Clicking the Recent Items icon [  ] provides quick access to the most recently edited courses.

### To search for a course:

1. On the Courses tab, click **Manage Courses**. The *Browse for a Course* page appears.
2. Conduct a course search. You can search alphabetically, by category, or whole word or partial word + wildcard. You can also narrow your search by selecting a development status and selecting the corresponding check boxes. By default, courses marked *Retired* are filtered out of your search criteria, however, you can select to include retired courses by selecting the **Retired** check box. **Note:** *You can also select the **All Versions** check box to search for all versions (not just the currently active version) of the course.*
3. Click **Search**. The system will return a listing of all courses that match your search criteria.
4. Click the name link of the selected course.

## EDITING A COURSE

Courses may be edited as needed. Edits can be made to a course that has not yet been published at any time. If the course has been published, it must be republished after edits are made to activate the changes. Examples of course edits include:

- Changing course properties
- Editing a test question
- Re-naming a learning activity
- Adding CE credit

*You cannot add, delete or rearrange learning activities in a course that has already been published.*

Consider whether to edit and republish an already-published course, creating a new course version, or creating a new course is the best option.

**IMPORTANT:** When editing an in-use test or evaluation, be sure to run and export report data (Test Question Analysis, Evaluation Scores by Course) before making the edits. These reports will be re-set to 0 once an edit is made, and previous data will be lost.

### To edit a course:

1. Perform a course search. The *Course Builder* page appears.
2. Make the desired edits to the course.
3. Republish the course.

## COPYING A COURSE

Administrators with the ability to create a course may choose to copy a course. This feature is useful when you need to create a new course quickly using components of an existing published course or for creating pre-defined course templates for quick re-use.

A copied course exists in the system as a new, independent course. The course from which the copy was made remains unchanged in the system; it simply acts as a template for the new course. After the copy is made, the two courses are completely distinct courses in the system, with no relationship between them.

The following components of a course are copied into the new instance:

- All course properties, including CE credit.
- All learning activities and their common properties.
- All test and evaluation question groups and questions.

All authored activity assets will be copied into a new folder in the Authoring Center. Consider re-associating your authored activities to the original content folder if you wish to have both courses reference the same content, or leave the association as-is if you wish to edit the copied HTML files for the newly-created course.

Classes are not copied with a course. The classroom activity and its common properties are copied, but new classes must be scheduled within the classroom activity.

While SCORM learning activities are copied, your SCORM content remains mapped to the original course's SCORM content folder.

### COPYING A COURSE VS. CREATING NEW COURSE VERSION

Copying a course is a shortcut for adding a new course. The feature is designed to let you use an existing course as a template, which saves you time by allowing you to re-use course properties and learning activities.

Since the copied course is not related to the original, the copy will not substitute for the original in assignments, exemptions, curricula, equivalents, or reports. If you need to make changes to an existing course and wish to keep assignments, exemptions, curricula, equivalents, and reporting unchanged, you should consider creating a new course version instead.

#### To copy a course:

1. Search for the published course that you want to copy.
2. Click the course name to open the *Course Builder* page.
3. Click **Copy Course**. A confirmation prompt appears. **Note:** After you click OK to confirm, the new course will be created in your system. Click OK only if you are certain you wish to create a copy of this course.
4. Click **OK**.

5. The *Course Properties* page will be displayed in Course Builder for the new course. The name of the new course will be the original course name with the word *COPY* appended to the end.
6. Change the course name as needed.
7. Modify the new course's properties and learning activities as needed and publish when ready.

The development status of the new course is automatically set to *In Development*. The course version is set to one, regardless of what the original course's version was when it was copied.

## CREATING A NEW COURSE VERSION

You may choose to create a new course version, or create a new course when you need to:

- Add or delete a learning activity.
- Rearrange learning activities.
- Make significant changes to a learning activity, such as extensive edits to a test or authored content.
- Make changes to CE credit associated with the course.

Consider the following when determining if course versioning or creating a new course is most appropriate:

Reporting on a course spans all course versions. If you need to report on a course version separately from the previous version or versions, create a new course. The system will view the new course as separate and distinct from other course versions.

When a course is versioned:

- Any authored learning activities are copied in the authoring directory and associated with the new course version. When editing authored content, be sure to select the correct version in the Content Manager.
- Any Authored SCORM learning activities are not copied. The new course version's SCORM learning activity will be no longer associated with a content folder in your authoring account. You must associate it with an existing folder, import a new content folder or publish new content from Lectora. See the Adding an Authored SCORM Learning Activity guide.
- Test Question Analysis, Test Scores, and other test reports are reset to 0. However, report data for the previous versions are preserved, and reports can be generated for previous course versions.
- CE credit attached to the previous version is transferred to the new course version. Follow accreditation/approval guidelines to ensure appropriate CE credit issuance.
- All classes scheduled for a class learning activity in a version of the course remain with that course version. The new version will not have any classes scheduled for it.

Course versioning does not affect assignments or exemptions.

When a course is published that has two or more versions, only the published version is the active version. The active version of the course is:

- Available for assignments (but doesn't require existing assignments to be updated)
- Available in the student's course catalog

If it is important to allow students to be able to choose which version to complete, or for administrators to choose which version to assign, consider creating a new course instead of a new version.

If you create a new version of a course that includes a test, you should run the Test Question Analysis report and export the data.

**Note:** Read the following section, *Un-enroll and Re-enroll Considerations*. When the **Un-enroll and Re-enroll Students from this Version of the Course** check box on the Publish page is cleared, students currently enrolled in the course will remain enrolled in that version of the course, whereas new enrollments will belong to the new (active) version.

Reports include completions for all versions of the course, though versions are not itemized. If it is important to make that distinction, consider creating a new course instead of a new version.

### **UN-ENROLL AND RE-ENROLL CONSIDERATIONS**

If you choose to version a course, consider the implications of the un-enroll and re-enroll selection when the new version is published.

#### **For administrators**

If you select the **Un-enroll and Re-enroll Students from this Version of the Course** check box, administrators:

- Cannot register students for upcoming classes in the previous course version.
- Will be able to manage prior classes associated with the previous course version.
- Cannot assign the previous course version.

If you do not select the **Un-enroll and Re-enroll Students from this Version of the Course** check box, administrators:

- Cannot register students for classes associated with the previous version (except for any students that are still enrolled in the previous version).
- Cannot schedule new classes for the previous version.
- Cannot assign the previous course version.

#### **For students**

If you select the **Un-enroll and Re-enroll Students from this Version of the Course** check box, enrolled students who have not yet completed the course:

- Are un-enrolled and re-enrolled into the new course version.
- Are dropped from any classes in which they were previously registered.

- Must complete all learning activities within the course from the beginning.
- Can register or be registered (by an administrator) for classes associated with the new course version only.

If you do not select the **Un-enroll and Re-enroll Students from this Version of the Course** check box, all students who have not yet completed the course:

- Will remain in the previous version (whether they were assigned or elected the previous course version).
- Will remain in any classes in which they are registered.
- Can choose to drop a class registration, but can only re-register for classes associated with the course version they are currently in (i.e. the previous course version).

 **To create a new course version:**

1. Search for the course that you want to version. The *Course Builder* page appears.
2. Click **Manage Course Versions**. A listing of all previous course versions appears.
3. Click **Create New** to the right of the course version you wish to replicate. The *Course Version Confirmation* page appears.
4. In the **Notes** text area, enter notes about the new course version.
5. Click **Confirm**. The new course version is now in edit mode. You can add, delete and rearrange learning activities, as well as make any other desired changes.
6. If CE credit was applied to the prior course version, review the CE information and determine if you wish to leave, edit or delete the CE credit.
7. Publish the new course version. Consider the impact of your un-enroll and re-enroll selection.

## **PUBLISHING UPDATED VERSIONS OF HEALTHSTREAM REGULATORY COURSES**

As HealthStream regulatory courses are updated and made available, you are able to choose if and when you wish to publish the new versions. You will be notified when new course versions become available. The version number of the update will be included in the customer notification, and will also appear on the course Regulatory and Patient Safety schedules found in the online help. The new versions will be placed, unpublished, within your course listing from the Manage Courses area.

Once a new regulatory course version becomes available in your Manage Courses area, you can determine if you wish to publish it immediately, or if you would like to publish it at a later date.

**Note:** Before you proceed with publishing a new course version, be sure you have exported annotations from any existing version of the course you may want to use in the new version. Once you publish the new version, you will not be able to export annotations from the previous version.

### To publish an updated version of a HealthStream regulatory course:

1. Search for the course that you want to publish. You must include all versions by clicking the **All Versions** check box on the search page. The *Course Builder* page appears. **Note:** *If you currently have a HealthStream regulatory course being updated and the new course version does not appear in your search return, contact your HealthStream support service.*
2. Click **Preview** to review the updated course content and assessments.
3. Click **Publish**. The *Publish* page appears.
4. Select **Quick Publish** or **Advanced Publish**.
5. Click **Go to Request Manager**. The course publishing request should say *Processing* or *Completed*. If the course publishing request message is *Failed*, contact your HealthStream support service.

## CHANGING COURSE OWNERSHIP

Courses developed at the department level must be removed as a department association before the department can be deleted. To do this, you must identify department-owned courses by running a department utilization report, specifying to include department-owned courses.

Once a course has been identified as being owned by a department you can change ownership of that course to the institution level.

### To change course ownership:

**Note:** *Classes associated with the course will remain as they existed in the department-owned course.*

1. Search for the department-owned course that you want to publish.
2. Click the name link of the department-owned course. A text box appears with the following information displayed: *This course was created at the department level. To change ownership of this course to reside at the institution level, click the Ownership link at the top of the page.*
3. Click **Ownership**. A text box appears with the following information displayed: *You have selected to change course ownership from department-level to institution-level ownership. This change will be committed when you press the Save button. The process cannot be undone. If you wish to proceed, press the Save button. If you do not wish to change course ownership, press the Cancel button.*
4. Click **Save**.

## INACTIVATING OR RETIRING A COURSE

You cannot delete a course. However, courses can be inactivated or retired. Inactivation occurs automatically once an inactivation date is added to the *Course Properties* page. Retiring a course involves manually changing the course development status to *Retired* and clearing certain publish options prior to republishing the course. Both accomplish the same goal: making the course unusable by students and, if desired, administrators. Using the inactivation method will allow the course to display on the Expiring Courses report. Using the retirement method will allow the course to be removed from students' *My Learning* pages.

	<b>Retiring</b>	<b>Inactivating</b>
Purpose	Prevents further use of the course.	Prevents further use of the course.  Stops students currently assigned or enrolled from completing the course.
Examples of When to Use	As part of course maintenance and site clean-up efforts.  When replacing with a brand new course.	Courses with CE credit that have a designated “shelf life.”  Proactive course management – tied to Expiring Courses report.
Requires republishing?	Yes	No if Inactivation Date was entered prior to initial publishing.  Yes if an Inactivation Date is added to a published course.
Students Currently Assigned but Not Yet Started	Remains on To-Do list.  Student is able to complete the course.	Remains on the To-Do list.  Student is unable to complete learning activities.
Students Currently Assigned and In Progress	Remains on To-Do list.  Student is able to complete the course.	Remains on the To-Do list.  Student is unable to complete learning activities.

Course was Elective	Remains on To-Do list.  Student is able to complete the course.	Remains on the To-Do list.  Student is unable to complete learning activities.
To Remove Assigned Course	Exempt Student	Exempt Student
To Remove Elective Course	Have student un-enroll	Have student un-enroll
Other considerations:	<p>Do not remove retired or inactivated courses from assignments as they will no longer be available for assignment-related reporting.</p> <p>Do not add an end date to an assignment that includes the retired or inactivated course for purposes of removing the assigned course unless it is the only course in the assignment.</p>	

### **INACTIVATING A COURSE**

1. Search for the course that you want to inactivate. The *Course Builder* page appears.
2. Click **Manage Course Properties**. The *Course Properties* page appears.
3. Click **Show Additional Properties**. The *Course Properties* page refreshes to include additional options.
4. In the **Inactivation Date** box, enter the date on which you want the course to become inactive.
5. Click **Save**.

If the course has already been published, you must republish the course by clicking **Publish** and selecting the desired publishing options. If the course has not yet been published, you can proceed with course development and then publish the course when ready. When a course reaches the inactivation date, it is no longer available for assignment or, if in progress, can no longer be completed. The inactivated course remains available for reporting purposes.

**Note:** Courses that include an inactivation date will appear on the *Expiring Courses* report. If a course has been assigned and is due to expire, a notification will be visible to students 30 days prior to expiration. Thereafter, the inactive course will remain visible to students until the student is exempted from the course. (Removing the course from an assignment or deleting the assignment itself will remove report data from *Assignment Completion Reports* and is therefore not recommended.)

## RETIRING A COURSE

1. Search for the course that you want to retire. The *Course Builder* page appears.
2. Click **Publish** (even if the course was previously published and is live). The *Publish* page appears.
3. In the **Course Development Status** list, select **Retired**.
4. Under **Quick Publish**, clear all publish options except the **This course can be used in Reports** and **This version is the active version of this course at the selected affiliation** check boxes. This will ensure that while the course is retired, it can still be included in reports as needed. **Note:** *Students currently enrolled in the course will remain enrolled until they either un-enroll from the course or are un-enrolled by an administrator.*
5. Click **Quick Publish** or **Advanced Publish** if the course was previously published to subsidiary affiliations and you want the course to be retired for all affiliations.
6. Click **Confirm**. The course is no longer available for use, except for reporting purposes.

### ★ Tips

- Click [  ] to select the date.

## LEARNING ACTIVITIES

### ADDING A LEARNING ACTIVITY

One or more learning activities can be added to a single course at any time until the course is published.

A course must be added before learning activities can be added.

You can add learning activities to a course as soon as the course is added, or you can search for the course at a later time and add learning activities if the course has not yet been published.

**Note:** *You cannot add, delete, or rearrange learning activities after a course has been published; however, you can edit learning activities and republish the course. If you need to add, delete, or rearrange learning activities after a course is published, you must create a new course or a new course version.*

Regardless of the type of learning activity you wish to add, you will complete a common properties page.

### ➡ Completing the Common Properties page:

1. In the **Name** box, enter the name for the activity.

2. In the **Completion Mode** list, select the completion mode. This selection dictates the student requirement for each activity.
3. In the **Description** text area, enter a description, if desired. This entry is not visible to students.
4. In the **Estimated Completion Time** boxes, enter the time, in hours and minutes, for this learning activity. These values are an estimation of the amount of time it will take students to complete the activity; it does not reflect actual time spent. Upon course completion, the system will total the estimated completion times entered for each learning activity that was completed within the course and will display an estimated time for the completed course on the student transcript. If a student completes a learning activity more than one time (for example, multiple attempts to pass a test), the system will count the estimated time for each attempt. If you do not wish to record an estimated completion time for an activity, you must enter a zero (0) in both the **Hours** and **Minutes** boxes. **Note:** *To accurately reflect the estimated completion time for a course, it is recommended that estimated completion times (in hours and minutes) be entered for every learning activity within the course. If you do not wish to record an estimated completion time for the course upon completion, enter zeros (0) into the **Hours** and **Minutes** boxes for each learning activity. The estimated time will then display as zero (0) on the selected reports.*
5. In the **Minimum Passing Score** box, enter the minimum passing score for this learning activity. The minimum passing score is available for scored learning activities only. A percent score can be entered requiring the student to meet or exceed that score to successfully complete the learning activity. If the student fails to meet the passing score he or she may or may not fail the course, depending on the activity's completion mode setting.
6. In the **Score Percent Weight** box, enter the score percent weight for this learning activity. Score percent weight is available for scored learning activities only. For instance, a course containing two tests and one classroom activity may have a score percent of 25% entered for each test (totaling 50%) and have a score percent of 50% entered for the classroom activity. When the student completes the course, the system will calculate an overall course score based upon the scores earned for each scored activity and the entered score percent weights. The overall course score will appear on the student's transcript.
7. Select the **Meeting minimum passing score will immediately complete the course** check box if you want to use a scored learning activity as a test-out opportunity for students. **Note:** *You do not need to select this check box when the learning activity is the last activity within a course. This box is used to identify learning activities that are being used as test-out opportunities only.*
8. Select the **Allow this learning activity to be overridden** check box if you want to give permission to subsidiary affiliations to edit a test or evaluation. Affiliations given override permission are identified using the permissions feature prior to course publishing. **Note:** *This check box is available only for tests and evaluations.*
9. Click **Save** when you have entered all the information. See learning activity-specific Help to proceed with adding each learning activity

## COURSE CONFIGURATION TOOL

Use the Course Configuration Tool to explore the decision points in determining common properties for your learning activities.

★ **Tips**

- If the course contains only one scored learning activity, and you wish to have the score for that activity appear on the student transcript, enter a score percent weight of 100% for that activity.

## CREATING A TEST-OUT OPPORTUNITY

A scored learning activity (test or classroom activity) can be added to an administrator-developed course to serve as a test-out opportunity for students. This test-out opportunity can be added as the first learning activity within the course, or any place within the course that the administrator deems appropriate.

➔ **To create a test-out opportunity:**

1. Click **Add a Test** or **Add a Classroom Template**.
2. Name the activity.
3. In the **Completion Mode** list, select *Completion Required*.
4. Add an activity description if desired.
5. In the **Estimated Completion Time** boxes, enter the time, in hours and minutes, for this learning activity, if desired. *Note: The system will total the estimated completion times for only the learning activities that were completed.*
6. In the **Minimum Passing Score** box, enter the minimum passing score for this learning activity (0 – 100).
7. Enter *100* in the **Score Percent Weight** box for this activity. Should the student fail the test-out opportunity and be required to complete the other learning activities, the test-out activity's score will not be averaged with the other course learning activities. **Note:** *Enter appropriate score percent weights (totaling 100%) for any other learning activities in the course, assuming these other activities will be required if the student does not pass the test-out opportunity.*
8. Select the **Meeting the minimum passing score will immediately complete course** check box.
9. Click **Save**.

**Note:** *If the learning activity is a test, determine the maximum number of test attempts from the Test Settings page. Do not set the maximum attempts to No Maximum, otherwise students will remain in the loop until they pass the test (forcing them to test out rather than complete other learning activities).*

## EDITING A LEARNING ACTIVITY

➔ **To edit a learning activity:**

**Note:** *To edit a learning activity within a published course, the course must be versioned.*

1. Click the learning activity name link.
2. Make the desired changes.
3. When you are done, click **Save**.

## DELETING A LEARNING ACTIVITY

Learning activities can only be deleted prior to course publishing.

### To delete a learning activity:

**Note:** To delete a learning activity within a published course, the course must be versioned.

1. Click the learning activity name link.
2. Click **Common Properties**.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the learning activity from the course.

## ABOUT SCORE PERCENT WEIGHTS AND THE OVERALL COURSE SCORE

When a course contains multiple scored learning activities, the score percent weight is used to determine how the scores will average together to provide an overall course score. For a single course, all scored learning activities should have a total score percent weight of 100%. Failure to include a total score percent weight of 100% across all scored learning activities in a course will lead to unexpected results in the overall course score.

### SCORE PERCENT WEIGHTS IN COURSES WITH PRE-ASSESSMENT ACTIVITIES

If you create a course that includes a learning activity that will act as a pre-assessment (test-out) opportunity, that learning activity should be given a score percent weight of 100%. Students who meet or exceed the minimum passing score on the activity will pass the entire course, and the score on that learning activity will be used as the overall course score.

Students who fail to meet the minimum passing score for the pre-assessment learning activity will be required to complete all remaining learning activities within the course. All other scored learning activities should total 100% (separately from the pre-assessment learning activity). In the event that a student does not pass the pre-assessment learning activity, the system will calculate the overall course score based upon the scores in the other learning activities.

### HOW THE OVERALL COURSE SCORE IS CALCULATED

The overall course score will appear on the student's transcript. When calculating the overall course score, the system will:

1. Multiply the score of each learning activity by the indicated score percent weight for that activity.
2. Add the scores of all scored learning activities

### Example 1: Equal Score Percent Weights

Your course includes four scored learning activities. Each learning activity is weighted equally at 25%. The student completes the course with the following scores:

- Learning Activity A: 100
- Learning Activity B: 90
- Learning Activity C: 80
- Learning Activity D: 70

The overall course score is calculated by multiplying each score by the learning activity's indicated score percent weight (25%), and then adding the weighted scores. The equation used is as follows:

$$(100 \times .25) + (90 \times .25) + (80 \times .25) + (70 \times .25) = 85$$

### Example 2: Unequal Score Percent Weights

Your course includes two scored learning activities. Learning Activity A is weighted at 67%. Learning Activity B is weighted at 33%. The student completes the course with the following scores:

- Learning Activity A (67% Weighting): 70
- Learning Activity B (33% Weighting): 90

The overall course score is calculated by multiplying each score by the learning activity's indicated score percent weight, and then adding the weighted scores. The equation used is as follows:

$$(70 \times .67) + (90 \times .33) = 76.6 \text{ (rounded up to 77 on the student's transcript)}$$

## COURSE ATTACHMENT LEARNING ACTIVITIES

### ADDING A COURSE ATTACHMENT LEARNING ACTIVITY

Administrators who also have the HealthStream Authoring Center can add course attachment learning activities to their administrator-developed courses. Two types of course attachments are available: Web address hyperlinks (URLs) and document files.

The **Instructions** field allows up to 256 characters for informing students what to do with the file or URL presented.

When the *Course Attachment* page is presented to the student, the **Continue** button is disabled. After the student clicks on the course attachment file link or URL, the **Continue** button is enabled, allowing the student to proceed with the course.

#### ONLINE (URLS)

A URL hyperlink allows for a course attachment to link to information on the Internet or the customer's intranet. The address must be complete. Typically, a URL begins with *http://*. Entering *www.website.com* will not work.

**DOCUMENT FILES**

Supported file types are listed below.

.AU	.dotx	.jpeg	.potm	.pptm	.xslb
.css	.flv	.mov	.potx	.pptx	.xlsm
.csv	.gif	.mp2	.ppam	.rtf	.xltm
.doc	.htm	.mp3	.pps	.swf	.xltx
.docm	.html	.mpa	.ppsm	.txt	.xml
.docx	.jpe	.mpv2	.ppsx	.xlam	.xsd
.dotm	.jpg	.pdf	.ppt	.xls	.mp4

The maximum file size is 5 MB.

The course attachment can be configured as a required or not required activity in the course using the desired completion mode selection. Course attachments have no score and therefore cannot impact an overall course score.

**ADDING AN ONLINE (URL) COURSE ATTACHMENT LEARNING ACTIVITY**

- I. Search for the course to which you want to add a course attachment learning activity. The *Course Builder* page appears.

2. Click **Add a Course Attachment**. The *Common Properties* page appears.
3. Complete the *Common Properties* page.
  - If the Completion Mode is set to *Completion Required*, students will be required to click on the download link to complete the course. If the Completion Mode is set to *Not Required*, students will be able to proceed with any subsequent learning activities that may appear in the course.
  - Do not include any special characters (characters that are neither letters nor numbers, like &, #, or @) in the activity name.
4. Click **Save**. The **Attachment Type** defaults to *Online*.
5. In the **Instructions** text area, enter instructions to the student.
6. In the **Title** box, enter the online course attachment title.
7. In the **URL** box, enter the desired URL (Web address) into the URL field. The URL must begin with *http://* or similar prefix, not *www*.
8. Click **Save**. The selected URL course attachment learning activity is now associated with the course.

**Note:** If the URL link points to your intranet, and a student is accessing the system from outside your organization's network firewall, the student may not be able to access the linked materials.

### **ADDING A DOCUMENT FILE COURSE ATTACHMENT LEARNING ACTIVITY**

If your organization's Authoring Account FTP/virtual directory is at the Enterprise-level, only courses developed at the Enterprise-level can include document attachments.

File course attachments are visible on a student's transcript when the course is completed.

Do not upload an attachment whose file name begins with a number or contains special characters (characters that are neither letters nor numbers, like &, #, or @).

1. Search for the course to which you want to add a course attachment learning activity. The *Course Builder* page appears.
2. Click **Add a Course Attachment**. The *Common Properties* page appears.
3. Complete the *Common Properties* page.
  - Note: If the Completion Mode is set to *Completion Required*, students will be required to click on the download link to complete the course. If the Completion Mode is set to *Not Required*, students will be able to proceed with any subsequent learning activities that may appear in the course.
  - Do not include any special characters (characters that are neither letters nor numbers, like &, #, or @) in the activity name.
4. Click **Save**. The **Attachment Type** defaults to *Online*.

5. In the **Instructions** text area, enter instructions to the student.
6. Click **File**. The page will refresh to include a **Browse** button.
7. In the **Title** box, enter the document title.
8. Click **Browse**. The browser will display a file selector to allow you to browse your computer's hard drive or network to select a single file.
9. Select a file from your computer or network.
10. Click **Save**. The selected document file course attachment learning activity is now associated with the course.

**Note:** *If the source file is edited, the file course attachment must also be edited to include the latest version of the source file. If the course has already been published, once the course attachment is edited, the course will have to be republished for students to see the most recent course attachment.*

**Warning:** *If the course has already been completed by students prior to updating the document attachment, the latest document will be accessible from the student transcript, not the document that was viewed during course completion. If this is undesirable, consider creating a new course version or a new course. If you choose to version the course, the document attachment associated with the prior version will remain with the prior version completions.*

#### ★ Tips

- Consider providing guidance to students as to when and where to save a file attachment as opposed to opening the file directly from the system.
- Because course attachments will remain available in the course after the course has been completed, instructions (or the attachments themselves) may need to include a Do not use after (date) notation.

## AUTHORED LEARNING ACTIVITIES

### ADDING AN AUTHORED LEARNING ACTIVITY

Customers can add content created with the HealthStream Authoring Center to their courses. The authored activity can be developed within the system, using the HTML editor, or it can be developed outside the system using any third-party HTML authoring tool. You can create the HTML content before creating the course, or during course creation.

If you have 100 or more sub-folders in your **Content** folder, it is recommended that you create authored learning activities from the *Course Builder* page when you create a course, rather than creating the authored learning activity first and then adding it to a course.

#### ➡ To add an authored learning activity to a course:

1. Search for the course to which you want to add an authored learning activity. The *Course Builder* page appears.
2. Click **Add an Authoring Center Activity**. The *Common Properties* page appears.
3. Complete the *Common Properties* page.

4. Click **Save**. The Content Manager appears, and a message displays requesting that you select a folder or add a new one.
5. From the Content Manager, click the desired folder to select it. Your chosen folder should include all necessary pages and media. Additionally, you can create a folder, create your content, or upload your content to a folder at this point.
6. Click **Save**. A confirmation prompt appears, indicating which folder you selected. The selected authored learning activity is now associated with the course.
7. Click **Return to Course Builder** to exit the Content Manager and return to the main *Course Builder* page.

### **PREVIEWING YOUR AUTHORED LEARNING ACTIVITY**

1. Click the desired folder name in the Content Manager so that it is selected.
2. Click **Preview Pages** to display the content in a secondary window. This window displays how the content will appear to students when it is viewed through your course.

## **ADDING A SCORM LEARNING ACTIVITY**

SCORM activities are developed outside the system using any SCORM-compliant e-learning development tool. SCORM content can be added to your authoring account either by using the import option (described below), or using a third-party FTP software client.

**Note:** Tests and evaluations created as part of a SCORM learning activity will not be usable in test or evaluation reports on the Reports tab. When creating a course, consider using the integrated assessment builder for creating tests and evaluations. This will ensure that reporting is available.

SCORM content created with the Lectora application can be uploaded directly to the HLC.

Before uploading SCORM content to the HLC Authoring Center, you should:

- Test that the content meets SCORM standards. You should use the third-party SCORM testing tools at [www.scorm.com](http://www.scorm.com) to verify that your content meets SCORM standards. (A free SCORM Cloud Account registration is required to access the SCORM.com test tracker.)
- Ensure that the content meets HealthStream's Authoring Center Policies and Guidelines. If you are importing SCORM content developed in another development tool, you are responsible for ensuring that your content is in compliance.

### **To add an authored SCORM learning activity to a course:**

1. Search for the course to which you want to add an SCORM learning activity. The Course Builder page appears.
2. Click **Add an Authored SCORM Activity**. The *Common Properties* page appears. **Note:** Online content that is not SCORM based is added by clicking the **Add an Authoring Center Activity** link from the *Course Builder* page.
3. Complete the *Common Properties* page.

4. Click **Save**.
5. When the next page opens, leave the **Learning Standard** option set to *SCORM*. Do not use the *AICC* option. This is for HealthStream use only.
6. Select the SCORM content to associate with the course. Select *Import* or *Choose a Folder*.
  - If your desired SCORM content has not been added to your authoring account (for example, via Lectora or FTP), select *Import*.
  - If your SCORM content is available on your authoring account, select *Choose a Folder*.

**Note:** If the SCORM content was previously transferred to your authoring account, you will not need to import it again. Simply choose the folder that contains the SCORM content.

### **IMPORTING SCORM CONTENT**

Importing SCORM content allows you to browse for and select a .zip file that contains SCORM content. The .zip file will be imported to your authoring account and unzipped as a content folder.

**The maximum size for SCORM .zip files uploaded through the Course Builder page is 100 MB.**

1. Click **Browse** to the right of the field .zip course package to import. The file selector for your web browser will open.
2. Browse for the .zip file containing SCORM content on your local hard drive.
3. Click **Open** in the browser's file selector.
4. Click **Load** on the *SCORM Import* page to import the .zip file and extract the file contents to your authoring directory.
5. Click **Preview** if you wish to preview the authored content that you have selected.
6. Click **Save**. The *SCORM Player Properties* page is displayed. This page contains its own set of links with SCORM-specific configuration options.
7. Click **Save**. The selected SCORM learning activity is now associated with the course.

### **CHOOSING A FOLDER**

Choosing a folder allows you to select a SCORM content folder in your authoring account.

1. Click the desired folder name link. A listing of SCORM assets within the folder appear in the window to the right.
2. Click **Preview** if you wish to preview the authored content that you have selected.
3. Click **Save**. The *SCORM Player Properties* page is displayed. This page contains its own set of links with SCORM-specific configuration options.

4. Click **Save**. The selected SCORM learning activity is now associated with the course.

## CHECKLIST LEARNING ACTIVITIES

### CHECKLISTS OVERVIEW

A checklist is a list of tasks for a student to perform in the presence of an evaluator, who gives each task a rating (e.g., *Pass* or *Fail*, *Met* or *Unmet*, *True* or *False*), depending on whether or not it was performed correctly. Checklists are assigned to students through courses that contain one or more checklist learning activities.

When students click the course name, they can view the course details; clicking a checklist learning activity from the *Course Details* page opens a read-only view of the checklist, which students can print and study.

Please Note: This is a read-only view of the checklist. This checklist must be submitted as **PASS** by an evaluator.

#### Introduction

Go down the checklist in order and give the Intern a pass or fail grade for each step.

1	Assesses character, location, radiation, duration, precipitating events, and relieving measures
2	Assesses for signs of shortness of breath, edema, and weight gain
3	Evaluates complaints of palpitation
4	Evaluates complaints of fatigue
5	Evaluates complaints of dizziness, syncope, or loss of consciousness
6	Assesses for orthostatic hypotension
7	Assesses arterial pulses using a 0-4 scale
8	Assesses for jugular vein distension
9	Auscultates heart sounds
10	Assesses extremities for vascular changes

This view also includes an **Evaluators** link. Clicking this link displays a list of people who have been designated as evaluators for the checklist.

Evaluators are associated with a checklist through student groups (see [Associating Evaluators with Checklists](#) for more information about associating evaluators) To evaluate a student, the evaluator clicks the **Manage Checklists** link on his or her To-Do list to open the Search Checklists page, and locates the checklist to be evaluated.

Connections To Do Completed Profile ▾ Catalog Upcoming Events Help

## Search Checklists

### Search by Student

 ✕ ▾

### Search by Checklist

 ▾

Checklists *Showing 1 - 1 of 1*

<b>Cardiac Problems</b> <i>Course Name: Checklist Cardiac Problems [v.2]</i> <b>STATUS:</b> Not Yet Started	Due: Dec 30, 2015	<input type="button" value="Evaluate"/> <span>▾</span>
---	-------------------	--

Clicking the **Evaluate** button opens the checklist.

## Introduction

Go down the checklist in order and give the Intern a pass or fail grade for each step.

## Evaluator Guidelines

Ensure that the Intern can perform all steps of the checklist correctly.

1	Assesses character, location, radiation, duration, precipitating events, and relieving measures	Met	Unmet
2	Assesses for signs of shortness of breath, edema, and weight gain	Met	Unmet
3	Evaluates complaints of palpitation	Met	Unmet
4	Evaluates complaints of fatigue	Met	Unmet
5	Evaluates complaints of dizziness, syncope, or loss of consciousness	Met	Unmet
6	Assesses for orthostatic hypotension	Met	Unmet
7	Assesses arterial pulses using a 0-4 scale	Met	Unmet
8	Assesses for jugular vein distension	Met	Unmet
9	Auscultates heart sounds	Met	Unmet
10	Assesses extremities for vascular changes	Met	Unmet

## Comments

Administrators must add instructions for the student, which appear on the checklist. Administrators can also include guidelines for evaluators, to assist them in working with students.

As the student performs the steps, the evaluator clicks **Pass** or **Fail** (or **Met** or **Unmet**, **True** or **False**, etc., depending on how the administrator configured the checklist). The learning activity's completion mode settings determine whether or not the student must pass all of the steps (see [Creating a New Checklist Learning Activity](#) for more information about these settings). A **Comments** box on the checklist enables evaluators to provide written feedback. Administrators can configure the checklist so that comments are visible to evaluators and administrators, but not to students.

Evaluators cannot submit a checklist unless they have recorded a response for *each item*.

If the student does not complete the checklist successfully, *Requires repeat* appears on the student's *Course Details* page and the evaluator's *Search Students* page. Students can make as many attempts, with as many different evaluators, as needed.

## CREATING A NEW CHECKLIST LEARNING ACTIVITY

The following instructions assume that you have already either located and opened the existing course to which you want to add the checklist learning activity, or created the course shell for a new course. If you want to add a checklist learning activity to a course that has been published, you must create a new version of the course first. After you have made your changes, you must republish the course. See [Creating a New Course Version and Republishing a Course](#) for more information.

When you create a new course version, all previous evaluator associations are removed from existing checklists. You will need to reassociate evaluators with the checklists in the course. See [Associating Evaluators with Checklists](#) for more information about associating evaluators.

Evaluators cannot submit a checklist unless they have recorded a response for *each item*.

### ➔ To create a new checklist learning activity:

1. From the Course Builder, click the **Add a checklist** link to open the checklist common properties form.
2. Complete the form.
  - Fields marked with an asterisk (\*) are required.
  - you must select a completion mode:
    - *Completion Required*—students must complete the checklist to complete the course, but do not have to pass all of the checklist tasks.
    - *Pass Required*—students must pass all of the checklist tasks for the checklist to appear on their transcript. If one task in the list is failed, the entire checklist is failed and it returns to the To-Do List to be attempted again. There is no limit to the number of times a student can attempt to pass the checklist. When all of the checklist tasks are passed, the checklist's status will read *Passed*.
  - If you are not weighting the course activity scores, the **Score Percent Weight** value must be 0.
  - If you are an enterprise-level administrator, and you want administrators at subsidiary institutions to be able to override this activity, select the **Allow this learning activity to be overwritten** check box.

3. Click the **Save** button to save the checklist common properties and open the checklist editor.
4. Type instructions for the checklist in the **Instructions** box.
  - Both students and evaluators will be able to see the instructions.
5. If necessary, type guidelines for the evaluators in the **Evaluator Guidelines** box.
  - Only evaluators will be able to see the evaluator guidelines.
6. If you want a button to appear on the checklist that evaluators can click to mark all tasks as passed, select the **Allow evaluators to pass all tasks with a single click** check box.
7. If you want multiple evaluators to be able to collaborate on the same checklist, select the **Allow all evaluators to share the completion of this checklist** check box.
  - When this check box is selected, an evaluator can rate some of the tasks on the checklist, save his or her progress, and have another evaluator continue rating tasks later.
8. If you do not want students to see evaluator comments, clear the **Allow students to see evaluator comments** check box.
9. Select an option from the **Response Text** list. This is the text (*Pass/Fail, Met/Unmet, etc.*) that will appear on the buttons that the evaluator clicks to record the student's performance.
10. To add a task, type a task description in the **Section Title/Task Description** box (this is the text that will appear on the checklist).
11. If you want evaluators to have a *Not Applicable (N/A)* option for the task (allowing the student to skip it), select the **Allow Not Applicable** check box for the task.
12. To add a section title, select the **Section** check box and type a title in the **Section Title/Task Description** box.
  - If you use sections, then the first item in the checklist must be a section title.
  - A section must contain at least one task.
  - A checklist cannot end with an empty section.
  - Section titles are used to break the checklist into sections.
13. If you need to add another task or section title, click the **Add Task** button to create a new **Section Title/Task Description** box.
14. Continue adding tasks and section titles as needed.

- To change a task or section title's order in the list, click and hold its move button [  ] and drag the task to its new position.
- To delete a task or section title, click its delete button [  ].

15. Click the **Save** button to save the checklist activity.

- If you receive an error message stating that *Task Description is required*, then there is a blank **Task** box in the list. Either type a task description in the box or delete it.

## PREVIEWING A CHECKLIST (EVALUATOR VIEW)

You can see how a checklist looks to an evaluator.

### To preview a checklist as an evaluator:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist that you want to preview.
3. From the search results, click the course name to open the Course Builder.
4. From the left-hand navigation pane, click a checklist learning activity to open the checklist editor.
5. Click the **Preview as Evaluator** link near the top of the page to open the checklist preview in a new browser window.

## ASSIGNING CHECKLISTS TO STUDENTS

Checklist learning activities are added to courses. See [Adding a Group Assignment](#) and [Adding an Individual Assignment](#) for more information on assigning courses.

## ASSOCIATING EVALUATORS WITH CHECKLISTS

Evaluators are students responsible for observing other students and validating that their checklist tasks are completed correctly. After a course that contains one or more checklists is published, an administrator can associate each checklist with one or more student groups. Each member of an associated student group becomes an evaluator for that checklist.

It is recommended that you adopt a naming convention for evaluator student groups (for example, including the word *evaluator* in the group name).

Immediately after you publish a course that includes one or more checklists, a link will be displayed that enables you to associate evaluators with checklists. You can also associate evaluators at any time after publishing, from a link on the **Courses** tab.

### To associate evaluators with a checklist:

1. From the **Courses** tab, click the **Manage Checklist Evaluators** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist with which you want to associate evaluators.
  - Only courses with checklists will appear in the search results.
3. From the search results, click the course name to open the *Associate Evaluators to Checklists* page.
4. From the **Checklists** list, select the checklist with which you want to associate evaluators.
  - If the course only contains one checklist, the selection will be made for you.
5. Select one or more student groups whose members will serve as evaluators for the checklist.
  - If you need to create a new student group, click the **Add New Student Group** link. See Adding an Individual Student Group and [Adding a Profile Student Group](#) for more information about creating student groups.
  - Click the **Search Student Groups** link to search for and select existing student groups.
  - Selected student groups are displayed in the **Evaluator Student Groups** box.
6. Click **Save**.

If you are associating evaluators from the publish confirmation page, click the **Click here to manage evaluator student groups for these checklists** link to open the *Associate Evaluators to Checklists* page, and skip the first three steps above.

## DISASSOCIATING STUDENT GROUPS FROM A CHECKLIST

You can remove the relationship between a checklist and any of the evaluator student groups that have been associated with it. The members of any dissociated groups will no longer be evaluators for that checklist.

### To disassociate evaluator student groups from a checklist:

1. From the **Courses** tab, click the **Manage Checklist Evaluators** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist with which you want to disassociate evaluators.
  - Only courses with checklists will appear in the search results.
3. From the search results, click the course name to open the *Associate Evaluators to Checklists* page.
4. In the **Evaluator Student Groups** box, clear the check box next to the student groups that you want to disassociate from the checklist.
5. Click **Save**.

## DISASSOCIATING CHECKLISTS FROM A STUDENT GROUP

### ➤ To disassociate checklists from a student group:

1. From the **People** tab, click the **Manage Student Groups** link to open the *Search Student Groups* page.
2. Specify the search criteria that you want to use.
3. Click the **Search** button.
  - From the search results, click the **Manage Checklists** link for the student group whose associated checklists you want to see.
  - The **Manage Checklists** link is disabled for student groups that do not have checklists associated with them.
  - The *Student Group Associations* page, which opens when you click the **Manage Checklists** link, displays all of the checklists that are associated with the student group. The checklists are grouped by course.
4. Select the check box in the **Disassociate Checklist** column for any checklists that you need to disassociate from the current student group.
  - Select the **Select All** check box to select all of the check boxes on the page.
5. Click the **Save** button.

### Related Topics

## VIEWING THE CHECKLISTS ASSOCIATED WITH AN EVALUATOR STUDENT GROUP

### ➤ To view the checklists that are associated with an evaluator student group:

1. From the **People** tab, click the **Manage Student Groups** link to open the *Search Student Groups* page.
2. Specify the search criteria that you want to use.
3. Click the **Search** button.
  - From the search results, click the **Manage Checklists** link for the student group whose associated checklists you want to see.
  - The **Manage Checklists** link is disabled for student groups that do not have checklists associated with them.

- The *Student Group Associations* page, which opens when you click the **Manage Checklists** link, displays all of the checklists that are associated with the student group. The checklists are grouped by course.

From the *Student Group Associations* page, you can click a checklist's **Manage** link to change the student groups that are associated with it. You can also disassociate the current student group from any or all of its associated checklists (see [Disassociating Checklists from a Student Group](#)).

## Related Topics

## EDITING A CHECKLIST

If you want to edit a checklist that is part of a published course, you must first create a new version of the course. After you have made your changes, you must republish the course. See [Creating a New Course Version and Republishing a Course](#) for more information.

When you create a new course version, all previous evaluator associations are removed from existing checklists. You will need to reassociate evaluators with the checklists in the course. See [Associating Evaluators with Checklists](#) for more information about associating evaluators.

### To edit a checklist:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist that you want to edit.
3. From the search results, click the course name to open the Course Builder.
4. From the left-hand navigation pane, click the checklist to open the checklist editor.
5. Make any necessary changes.
  - To change a task's order in the list, click and hold its move button [  - To delete a task, click its delete button [
6. Click **Save**.

## HIDING EVALUATOR COMMENTS FROM STUDENTS

You can prevent evaluator comments from being visible to students. Administrators and other evaluators will be able to see the comments.

### To hide evaluator comments from students:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.

2. Search for the course that contains the checklist that you want to edit.
3. From the search results, click the course name to open the Course Builder.
4. From the left-hand navigation pane, click the checklist to open the checklist editor.
5. Clear the **Allow students to see evaluator comments** check box.
6. Click **Save**.

## DELETING CHECKLISTS

If you want to delete a checklist that is part of a published course, you must first create a new version of the course. After you have made your changes, you must republish the course. See [Creating a New Course Version and Republishing a Course](#) for more information.

When you create a new course version, all previous evaluator associations are removed from existing checklists. You will need to reassociate evaluators with the remaining checklists in the course (if any). See [Associating Evaluators with Checklists](#) for more information about associating evaluators.

### To delete a checklist:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist that you want to delete.
3. From the search results, click the course name to open the Course Builder.
4. From the left-hand navigation pane, click the checklist to open the checklist editor.
5. Click the **Common Properties** link to open the common properties form.
6. Click the **Delete** button.
7. When prompted to confirm the deletion, click **OK**.

## EXPORTING CHECKLISTS

You can export a checklist learning activity from one course and import it into another.

### To export a checklist:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.
2. Search for the course that contains the checklist that you want to export.
3. From the search results, click the course name to open the Course Builder.

4. From the left-hand navigation pane, click a checklist learning activity to open the checklist editor.
5. Click the **Export** link near the top of the page to open a save file dialog.
6. Save the file to your computer.

## IMPORTING CHECKLISTS

Checklist data can be exported from one checklist activity as an .hte file and imported into another checklist activity. (See Exporting Checklists.)

You can import checklist data at the same time that you create a new checklist activity, or you can import the data into an existing checklist activity. Imported tasks will be added *below* any existing tasks. You will be able to choose which parts of the existing checklist (if any) are overwritten by the file that you import. If you import a checklist that contains sections, the system will automatically add a blank section title at the top of the checklist activity into which you are importing the data.

If you want to import a checklist into a course that has been published, you must first create a new version of the course. After you have made your changes, you must republish the course. See [Creating a New Course Version and Republishing a Course](#) for more information.

The following instructions assume that you want to import a checklist into an existing checklist activity that is part of an unpublished course.

### To import a checklist:

1. From the **Courses** tab, click the **Manage Courses** link to open the *Browse for a Course* page.
2. Search for the course into which you want to import a checklist.
3. From the search results, click the course name to open the Course Builder.
4. From the left-hand navigation pane, click the checklist activity to open the checklist editor.
5. Click the **Import** link near the top of the page to open the *Checklist Import* page.
6. Click the **Browse** button to open a *Choose File to Upload* dialog.
7. Navigate to the .hte file that you want to import and click it to select it.
8. Click the **Open** button to return to the *Checklist Import* page.
9. Click the **Load** button to load the file and display the import options.
10. Select the **Overwrite instructions** check box if you want to replace the current instructions (if there are any) with the instructions in the file that you are importing.
11. Select the **Overwrite evaluator guidelines** check box if you want to replace the current evaluator guidelines (if there are any) with the guidelines in the file that you are importing.

12. Select the **Overwrite tasks** check box if you want to replace the current tasks (if there are any) with the tasks in the file that you are importing.
13. In the **Tasks** section, clear the check box next to any tasks that you do NOT want to import.
14. Click the **Import** button.
15. When prompted to confirm the import, click **OK** to import the file and return to the checklist editor.
16. Make any necessary adjustments.
  - To change a task's order in the list, click and hold its move button [] and drag the task to its new position.
  - To delete a task, click its delete button [].
17. Click **Save**.

## ENTERPRISE-LEVEL CONSIDERATIONS

If you are an enterprise-level administrator and plan to publish courses with checklist activities to subsidiary institutions, keep the following things in mind:

- You can assign evaluator student groups at the enterprise level, but students at subsidiaries will only be able to see evaluators who belong to their institution.
- Administrators at subsidiaries can add their own institution-specific evaluator student groups.
- Institution-level administrators cannot edit enterprise-level student groups.
- Institution-level student groups cannot be edited from the enterprise level (although enterprise-level administrators can navigate to the institution level and edit student groups from there).

## CHECKLIST TASK ANALYSIS REPORT

The Checklist Task Analysis report displays the number of students who have completed the checklist, the number of tasks on the checklist, and the total number of checklist attempts. For each checklist task, the number and percentage of times that the task was passed, failed, or skipped is also displayed.

### To run the Checklist Task Analysis report:

1. From the **Education Reports** section of the **Reports** tab, click the **Checklist Task Analysis** link to open the criteria selection page.
2. Click the **Select a Course** link to open the *Browse for a Course* page.
3. Search for the course that contains the checklist for which you want to run the report.

4. From the search results, click the course name to select it and return to the criteria selection page.
5. Select a course version from the **Course Version** list.
6. Click the **Select a Checklist** link to open the *Checklist Override Selector* page.
7. From the left-hand pane, click a checklist name to select it.
8. Click the **Continue** button to return to the criteria selection page.
9. Specify a completion date range.
  - Select the option button next to the predefined range list and select a predefined date range, or
  - Select the option button next to the **From** box and enter dates in the **From** and **Through** boxes.
10. Click the **Continue** button to run the report.

## E-LEARNING MODULE

Click [here](#) to open an e-learning module on checklist management.

## SCORM LEARNING ACTIVITIES

### ADDING A SCORM LEARNING ACTIVITY

SCORM activities are developed outside the system using any SCORM-compliant e-learning development tool. SCORM content can be added to your authoring account either by using the import option (described below), or using a third-party FTP software client.

**Note:** *Tests and evaluations created as part of a SCORM learning activity will not be usable in test or evaluation reports on the Reports tab. When creating a course, consider using the integrated assessment builder for creating tests and evaluations. This will ensure that reporting is available.*

SCORM content created with the Lectora application can be uploaded directly to the HLC.

Before uploading SCORM content to the HLC Authoring Center, you should:

- Test that the content meets SCORM standards. You should use the third-party SCORM testing tools at [www.scorm.com](http://www.scorm.com) to verify that your content meets SCORM standards. (A free SCORM Cloud Account registration is required to access the SCORM.com test tracker.)
- Ensure that the content meets HealthStream's Authoring Center Policies and Guidelines. If you are importing SCORM content developed in another development tool, you are responsible for ensuring that your content is in compliance.

 **To add an authored SCORM learning activity to a course:**

1. Search for the course to which you want to add an SCORM learning activity. The Course Builder page appears.
2. Click **Add an Authored SCORM** Activity. The *Common Properties* page appears. **Note:** *Online content that is not SCORM based is added by clicking the **Add an Authoring Center Activity** link from the Course Builder page.*
3. Complete the *Common Properties* page.
4. Click **Save**.
5. When the next page opens, leave the **Learning Standard** option set to *SCORM*. Do not use the *AICC* option. This is for HealthStream use only.
6. Select the SCORM content to associate with the course. Select *Import* or *Choose a Folder*.
  - If your desired SCORM content has not been added to your authoring account (for example, via Lectora or FTP), select *Import*.
  - If your SCORM content is available on your authoring account, select *Choose a Folder*.

**Note:** *If the SCORM content was previously transferred to your authoring account, you will not need to import it again. Simply choose the folder that contains the SCORM content.*

### **IMPORTING SCORM CONTENT**

Importing SCORM content allows you to browse for and select a .zip file that contains SCORM content. The .zip file will be imported to your authoring account and unzipped as a content folder.

**The maximum size for SCORM .zip files uploaded through the Course Builder page is 100 MB.**

1. Click **Browse** to the right of the field .zip course package to import. The file selector for your web browser will open.
2. Browse for the .zip file containing SCORM content on your local hard drive.
3. Click **Open** in the browser's file selector.
4. Click **Load** on the *SCORM Import* page to import the .zip file and extract the file contents to your authoring directory.
5. Click **Preview** if you wish to preview the authored content that you have selected.
6. Click **Save**. The *SCORM Player Properties* page is displayed. This page contains its own set of links with SCORM-specific configuration options.
7. Click **Save**. The selected SCORM learning activity is now associated with the course.

### **CHOOSING A FOLDER**

Choosing a folder allows you to select a SCORM content folder in your authoring account.

1. Click the desired folder name link. A listing of SCORM assets within the folder appear in the window to the right.
2. Click **Preview** if you wish to preview the authored content that you have selected.
3. Click **Save**. The *SCORM Player Properties* page is displayed. This page contains its own set of links with SCORM-specific configuration options.
4. Click **Save**. The selected SCORM learning activity is now associated with the course.

## ADDING SCORM CONTENT TO HLC COURSES

SCORM content developed in Lectora or any other SCORM development tool can be delivered through the HealthStream Learning Center (HLC) as an authored SCORM learning activity.

### LECTORA USERS

Lectora users can upload SCORM content directly from Lectora to the HLC. To do so, you must:

1. Install the **Upload to HealthStream** service pack.
2. Prepare your Lectora content for upload to the HLC.
3. Upload your Lectora content to the HLC.
4. Add your uploaded content as an authored SCORM activity to an HLC course.

## SCORM PLAYER PROPERTIES

[Click here to access the SCORM Player Properties guide.](#)

## CLASSROOM ACTIVITIES

### ADDING A CLASSROOM TEMPLATE

A classroom template serves as a placeholder for classes to be scheduled after the course is published. The classroom template allows you to name the class, identify qualified instructors and designate minimum and maximum class sizes.

 **To add a classroom template to a course:**

*Note: You will be prompted to schedule classes once the course is published.*

1. Search for the course to which you want to add a classroom template. The *Course Builder* page appears.
2. Click **Add a Classroom Template**. The *Common Properties* page appears.
3. Complete the *Common Properties* page.
4. Click **Save**. The *Classroom Template* appears.

5. In the **Minimum Size** and **Maximum Size** boxes, enter the minimum and maximum class size. The default settings are 0. (These values can be edited later when scheduling a class).
6. In the **Class Comments**, **Class Material**, **Class Material Contact**, and **Class Material Location** text areas, add the desired information.
7. Click **Add Instructors** to select qualified instructors for the class. The *Search Instructor(s)* page appears, from which you can search for all instructors within your database.
8. Enter the desired search terms.
9. Click **Search**. A list of matching instructors appears at the bottom of the page.
10. Click **Check All Current Search Results** if you wish to add all instructors found on your search to the classroom template, or select the check box(es) for those instructor(s) you wish to add.
11. Click **Continue**.
12. Select the **Use Only Qualified Instructors** check box if you wish to limit the instructors who can teach the class to only those added to the classroom template. If not selected, you will be able to conduct another instructor search when scheduling classes. **Note:** *All administrators with rights to schedule classes are considered instructors and will be included in your search return if they match your search criteria.*
13. In the **No Show** list, select the No Show rule for the class:
  - **Student is Incomplete:** This selection results in students graded as *No Show* remaining in incomplete status, when the class learning activity completion mode is *Completion Required* or *Pass Required*. Grading the student as *No Show* will not fail the class.
  - **Student Fails the Course:** This selection results in students graded as *No Show* failing the class and therefore failing the course when the class learning activity completion mode is *Completion Required* or *Pass Required*. Students cannot re-register for a class unless this option is selected.
14. Click **Save**. The classroom template has now been added to the course.

## EDITING A CLASSROOM ACTIVITY: CHANGING THE NO SHOW OPTION FROM FAILED TO INCOMPLETE

When students are graded as *No Show* for a class, they will either fail the course or remain in an Incomplete status for the course. This is determined by the No Show Rule setting on the class learning activity *Classroom Template* page.

### CHANGING THE CLASS NO SHOW RULE FROM STUDENT FAILS THE COURSE TO STUDENT IS INCOMPLETE

1. Search for the course that contains the classroom learning activity that you want to edit. The *Course Builder* page appears.
2. Click the class learning activity link from the course navigation tree. The *Classroom Template* page appears.

3. Click **No Show Rule: Student is Incomplete**.
4. Click **Save**.
5. Republish the course.

**Note:** Changing the No Show Rule setting on a prior class learning activity and republishing the course will apply to new classes scheduled for this learning activity. It will neither impact students subsequently registered in existing classes, nor will it impact existing No Show grades unless the grade status is changed and saved. If you choose to change the No Show Rule setting for a class, carefully review the steps below to understand the impact of the rule change on the class and the students in the class.

### **CHANGING A STUDENT'S GRADE STATUS FROM FAILED (DUE TO NO SHOW)**

1. Search for the course that contains the classroom learning activity that you want to edit. The *Course Builder* page appears.
2. Click the class learning activity link from the course navigation tree. The *Classroom Template* page appears.
3. Click the **Grade** link. The list of previously graded students appears.
4. Clear the **No Show** check box next to any No Show students whose status you wish to change.
5. Click **Save**. The No Show students are now in an ungraded status and will no longer appear on the No Show report. The system also removes the failure status from the course.
6. When the student status has been changed to ungraded, choose one of the following options:
  - If you want the student's status to be Incomplete, select *No Show* as the student's grade, and click **Save**. The student will appear on the No Show report, but will not be able to complete the course.
  - If you want the student to proceed through the course, click **Manage Registrations**, and click **Drop** to remove the student's class registration. The student can now be registered into another class (or self-register if class settings allow) and proceed through the course. The student will not appear on the No Show report.

**Note:** Administrators can elect to include failed courses on transcripts as well as run the *Failed Courses* report.

### **EDITING A CLASSROOM ACTIVITY: CHANGING THE NO SHOW OPTION FROM INCOMPLETE TO FAILED**

When students are graded as *No Show* for a class, they will either fail the course or remain in an incomplete status for the course. This is determined by the No Show Rule setting on the class learning activity *Classroom Template* page.

### **CHANGING THE CLASS NO SHOW RULE FROM STUDENT IS INCOMPLETE TO STUDENT FAILS THE COURSE**

1. Search for the course that contains the classroom learning activity that you want to edit. The *Course Builder* page appears.

2. Click the class learning activity link from the course navigation tree. The *Classroom Template* page appears.
3. Click **No Show Rule: Student Fails the Course**.
4. Click **Save**.
5. Republish the course.

**Note:** Changing the No Show Rule setting on a class learning activity and republishing the course will apply to new classes scheduled for this learning activity. It will not impact students subsequently registered in existing classes, nor will it impact existing No Show grades unless the grade status is changed and saved. If you choose to change the No Show Rule setting for a class, carefully review the steps below to understand the impact of the rule change on the class and the students in the class.

### **CHANGING A STUDENT'S GRADE STATUS FROM INCOMPLETE (DUE TO NO SHOW)**

1. Search for the course that contains the classroom learning activity that you want to edit. The *Course Builder* page appears.
2. Click the class learning activity link from the course navigation tree. The *Classroom Template* page appears.
3. Click the **Grade** link. The list of previously graded students appears.
4. Clear the **No Show** check box next to any No Show students whose status you wish to change.
5. Click **Save**. The No Show students are now in an ungraded status and will no longer appear on the No Show report.
6. When the student status has been changed to ungraded, choose one of the following options:
  - If you want the student's status to be Failed, check *No Show* as the student's grade, and click **Save**. The student will appear on the No Show and Failed Courses reports.
  - If you want the student to proceed through the course, click **Manage Registrations**, and click **Drop** to remove the student's class registration. The student can now be registered into another class (or self-register if class settings allow) and proceed through the course. The student will not appear on the No Show report.

**Note:** Administrators can elect to include failed courses on transcripts as well as run the Failed Courses report.

## **ADDING A VIRTUAL CLASS ACTIVITY**

Only HealthStream Virtual Class customers using the optional virtual class feature can add virtual class activities to their courses.

### **To add a virtual class activity:**

1. Search for the course to which you want to add a virtual class activity. The *Course Builder* page appears.
2. Click Add a **Virtual Class Template**. The *Common Properties* page appears.
3. Complete the *Common Properties* page.

4. Click **Save**. The Virtual Class Template appears.
5. Enter additional information as desired in the optional fields.
6. Click **Add Instructors** to select qualified instructors for the virtual class. You are presented with a search page which allows you to search for all instructors within your database.
7. Click **Check All Current Search Results** if you wish to add all instructors found on your search to the classroom template, or select the check box(es) for those instructors you wish to add.
8. Click **Continue**.
9. Select the **Use Only Qualified Instructors** check box if you wish to limit the instructors who can teach the class to only those added to the virtual class template. If left cleared, you will be able to conduct another instructor search when scheduling virtual classes. **Note:** *All administrators with rights to schedule classes are considered instructors and will be included in your search return if they match your search criteria.*
10. Select the **No Show** rule for the class:
  - **Student is Incomplete:** This selection will result in students graded as *No Show* remaining in incomplete status, when the virtual class learning activity completion mode is *Completion Required* or *Pass Required*. Grading the student as *No Show* will not fail the virtual class.
  - **Student Fails the Course:** This selection will result in students graded as *No Show* failing the virtual class and therefore failing the course when the virtual class learning activity completion mode is *Completion Required* or *Pass Required*.
11. Click **Save**. The virtual class activity has now been added to the course.

**Note:** *You will be prompted to schedule virtual classes once the course is published.*

## TESTS

### ADDING A TEST

Tests can be placed anywhere within the course, for example, as the first learning activity, between two other learning activities, or as the final learning activity. Depending upon the Completion Mode selected from the *Common Properties* page, tests can serve as pre- and post-assessments.

#### **To add a test:**

1. Search for the course to which you want to add a test. The *Course Builder* page appears.
2. Click **Add a Test**. The *Common Properties* page appears.
3. Enter the common properties.
4. Click **Save**. The test editing page appears.

## ADDING TEST QUESTIONS

### To add test questions:

1. Click **Default Group** to begin creating test questions. The *Default Group* page appears. You can place all test questions in this single group, or you can create multiple question groups by clicking **Add Group**. Each question group can be renamed and has its own settings, including the number of questions you wish to deliver from each group. Students will not see the question groups when taking a test. **Note:** *Once questions are created, each question group must be edited to indicate how many of the available questions are to be delivered in the test.*
2. Click **Add Question**. The *Select a Question Type* page appears.
3. In the **Select a question type** list, select one of the test question types:
  - **True/False**
  - **Multiple Choice**
  - **Drop-Down Choice**
  - **Multiple Select**
  - **Matching**
4. Click **Continue**.

Click the links below for details about adding each type of question and for managing a question group once all questions are added.

## ADDING A TRUE/FALSE TEST QUESTION

### To add a True/False test question:

1. In the **Select a question type** list, select **True/False**.
2. Click **Continue**. The *True/False question* page appears.
3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.
6. Select the **Use extended feedback** check box, if desired. Extended feedback allows the student to view the question, the answer he or she chose, and all potential answers and associated rationale when scoring the test. **Note:** *You must select the **Display feedback when this assessment is graded** check box on the*

*Test Settings page for extended feedback to be used. If you selected the **Incorrectly Answered Questions (Feedback Only)** feedback display option on the **Test Settings** page, extended feedback is not available.*

7. In the **Order** lists, change the order in which the answers will display, if desired. *Note: If the **Shuffle answers when this assessment is rendered** option is enabled, then the order set here will be overridden and your answers will be randomized when presented to students.*
8. In the **Correct** column, change the correct answer if you desire.
9. Click **Edit** if you want to edit the answers or to add rationale.
10. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
  - Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.
11. You may preview the new question by clicking **Preview**. The question appears in a preview window.

★ **Tips**

- You can edit the default True/False answers to other answer options that may be more appropriate to your question, such as *Yes/No*, *Correct/Incorrect*, or other word opposites.

## ADDING A MULTIPLE CHOICE TEST QUESTION

A multiple choice question allows the student to make only one answer choice within the test. All answers appear as a list of options below the questions.

*Note: The drop-down choice question functions identically to the multiple choice question, with the exception that the answer choices are presented in a drop-down menu on the test.*

➡ **To add a multiple choice test question:**

**Note:** You must add at least two answers to a multiple choice question.

1. In the **Select a question type** list, select **Multiple Choice**.
2. Click **Continue**. The *Multiple Choice* question page appears.
3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.

6. Select the **Use extended feedback** check box, if desired. Extended feedback allows the student to view the question, the answer he or she chose, and all potential answers and associated rationale when scoring the test. **Note:** You must select the **Display feedback when this assessment is graded** check box on the *Test Settings* page for extended feedback to be used. If you selected the *Incorrectly Answered Questions (Feedback Only)* feedback display option on the *Test Settings* page, extended feedback is not available.
7. Click **Add New Answer**. The *Answer* page appears.
8. Select the **This answer is correct** check box if you are entering the correct answer.
9. In the **Answer Text** editing area, enter the answer text.
10. In the **Feedback** editing area, enter the rationale, if desired. This is the feedback that will be displayed when a student selects this response.
11. Do one of the following:
  - Click **Continue and Add Another** if you wish to add more answers to this question. You are returned to the *Answer* page. Repeat the steps described above for adding answers.
  - Click **Continue** if this is the final answer you wish to add. You are returned to the question page.
12. In the **Order** lists, change the order in which the answers will display, if desired. *Note: If the **Shuffle answers when this assessment is rendered** option is enabled, then the order set here will be overridden and your answers will be randomized when presented to students.*
13. In the **Correct** column, change the correct answer if you desire.
14. Click **Edit** if you want to edit the answers or to add feedback.
15. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
  - Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.
16. You may preview the new question by clicking **Preview**. The question appears in a preview window.

## ADDING A DROP-DOWN CHOICE TEST QUESTION

A drop down choice question allows the student to make only one answer choice within the test. All answers are displayed in a drop-down menu on the test.

**Note:** The multiple choice question functions the same as a drop-down choice question except that all answers are displayed as a list of options below the question.

 **To add a drop-down choice test question:**

**Note:** You must add at least two answers to a drop-down choice question.

1. In the **Select a question type** list, select **Drop-Down Choice**.
2. Click **Continue**. The **Drop-Down Choice** question page appears.
3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.
6. Select the **Use extended feedback** check box, if desired. Extended feedback allows the student to view the question, the answer he or she chose, and all potential answers and associated rationale when scoring the test. **Note:** You must select the **Display feedback when this assessment is graded** check box on the *Test Settings* page for extended feedback to be used. If you selected the *Incorrectly Answered Questions (Feedback Only)* feedback display option on the *Test Settings* page, extended feedback is not available.
7. Click **Add New Answer**. The *Answer* page appears.
8. Select the **This answer is correct** check box if you are entering the correct answer.
9. In the **Answer Text** editing area, enter the answer text.
10. In the **Feedback** editing area, enter the rationale, if desired. This is the feedback that will be displayed when a student selects this response.
11. Do one of the following:
  - Click **Continue and Add Another** if you wish to add more answers to this question. You are returned to the *Answer* page. Repeat the steps described above for adding answers.
  - Click **Continue** if this is the final answer you wish to add. You are returned to the question page.
12. In the **Order** lists, change the order in which the answers will display, if desired. *Note: If the **Shuffle answers when this assessment is rendered** option is enabled, then the order set here will be overridden and your answers will be randomized when presented to students.*
13. In the **Correct** column, change the correct answer if you desire.
14. Click **Edit** if you want to edit the answers or to add feedback.
15. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.

- Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.

16. You may preview the new question by clicking **Preview**. The question appears in a preview window.

## ADDING A MULTIPLE SELECT TEST QUESTION

A multiple select question allows for more than one correct answer to a single question. Students make their selections by clicking check boxes on the test and must select all correct answers to correctly answer the question.

### To add a multiple select test question:

**Note:** You must add at least two answers to a multiple select question.

1. In the **Select a question type** list, select **Multiple Select**.
2. Click **Continue**. The **Multiple Select** question page appears.
3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.
6. Select the **Use extended feedback** check box, if desired. Extended feedback allows the student to view the question, the answer he or she chose, and all potential answers and associated rationale when scoring the test. **Note:** You must select the **Display feedback when this assessment is graded** check box on the *Test Settings* page for extended feedback to be used. If you selected the *Incorrectly Answered Questions (Feedback Only)* feedback display option on the *Test Settings* page, extended feedback is not available.
7. Click **Add New Answer**. The *Answer* page appears.
8. Select the **This answer is correct** check box if you are entering the correct answer.
9. In the **Answer Text** editing area, enter the answer text.
10. In the **Feedback** editing area, enter the rationale, if desired. This is the feedback that will be displayed when a student selects this response.
11. Do one of the following:
  - Click **Continue and Add Another** if you wish to add more answers to this question. You are returned to the *Answer* page. Repeat the steps described above for adding answers.
  - Click **Continue** if this is the final answer you wish to add. You are returned to the question page.

12. In the **Order** lists, change the order in which the answers will display, if desired. *Note: If the **Shuffle answers when this assessment is rendered** option is enabled, then the order set here will be overridden and your answers will be randomized when presented to students.*
13. In the **Correct** column, change the correct answer if you desire.
14. Click **Edit** if you want to edit the answers or to add feedback.
15. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
  - Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.
16. You may preview the new question by clicking **Preview**. The question appears in a preview window.

★ **Tips**

- You may wish to add a hint to your question text so that students will know that they may select more than one answer to the question. For instance, you may add the statement: *Check all pertinent answers.*

## ADDING A MATCHING TEST QUESTION

Matching questions allow you to provide a list of items, and allow students to select the appropriate item match from a corresponding list.

➡ **To add a matching test question:**

**Note:** You must add at least two answers to a matching question (excluding distractors).

1. In the **Select a question type** list, select **Matching**.
2. Click **Continue**. The *Matching question* page appears.
3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.
6. Select the **Use extended feedback** check box, if desired. Extended feedback allows the student to view the question, the answer he or she chose, and all potential answers and associated rationale when scoring the test. **Note:** You must select the **Display feedback when this assessment is graded** check box on the *Test Settings* page for extended feedback to be used. If you selected the *Incorrectly Answered Questions (Feedback Only)* feedback display option on the *Test Settings* page, extended feedback is not available.
7. Click **Add New Answer**. The *Answer* page appears.

8. Select the **Use match text as distractor (item text is not required)** check box if you want to add an additional selection in the answer list that has no item match.
9. In the **Answer Text** editing area, enter the answer text. Leave blank if you selected the **Use match text as distractor** check box in the previous step.
10. In the **Match** box, enter the match. If you selected the **Use match text as distractor** check box, then enter the match distractor. Matches must be unique. Using the same match for more than one item may result in question scoring errors.
11. In the **Feedback** editing area, enter the rationale, if desired. This is the feedback that will be displayed when a student selects this response.
12. Do one of the following:
  - Click **Continue and Add Another** if you wish to add more answers to this question. You are returned to the Answer page. Repeat the steps described above for adding answers.
  - Click **Continue** if this is the final answer you wish to add. You are returned to the question page.
13. In the **Order** lists, change the order in which the answers will display, if desired. *Note: If the **Shuffle answers when this assessment is rendered** option is enabled, then the order set here will be overridden and your answers will be randomized when presented to students.*
14. Click **Edit** if you want to edit the answers or to add feedback.
15. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
  - Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.
16. You may preview the new question by clicking **Preview**. The question appears in a preview window.

## EDITING TEST SETTINGS

### To edit test settings:

1. Click **Edit Settings**. The *Assessment Settings* page appears. This feature allows you to customize the test properties.
2. In the **Maximum Test Attempts** list, select the maximum number of times a student can take the test. This feature allows you to limit the number of times students can attempt a test. If a student fails to pass a test marked with a *Pass Required* completion mode within the specified number of attempts, he or she will fail the test and fail the course.

3. In the **Time Limit (minutes)** box, enter the time limit for the test, in minutes. If a time limit is set, the student will see a display clock when taking the test. If the student does not complete the test within the allotted time, the test will be graded and unmarked test questions will be marked as incorrect. If the result is a failed test, this may or may not fail the course, depending on the Completion Mode setting for the test.
4. In the **Presentation Mode** list, select how the test will be presented to the student.
  - **SinglePage** generates all test questions on a downward scrolling page.
  - **MultiPage** generates each test question on its own page.
5. In the **Display Feedback For** list, select how test feedback is displayed to the student after the test is completed:
  - Select **All Questions** to display each question, the answer chosen by the student, and the correct answer.
  - Select **Correctly Answered Questions Always** to display each question answered correctly, regardless of whether the student passed or failed the test.
  - Select **Incorrectly Answered Questions Always** to display each question answered incorrectly and any associated rationale, regardless of whether the student passed or failed the test.
  - Select **Correctly Answered Questions When Student Passes** to display each question answered correctly if the student passed the test.
  - Select **Correctly Answered Questions When Student Fails** to display each question answered correctly if the student failed the test.
  - Select **Incorrectly Answered Questions When Student Passes** to display each question answered incorrectly and any associated rationale if the student passed the test.
  - Select **Incorrectly Answered Questions When Student Fails** to display each question answered incorrectly and any associated rationale if the student failed the test.
  - Select **Incorrectly Answered Questions (Feedback Only)** to display only the questions that the students answered incorrectly. The student sees only the feedback for the incorrect response; the answer that he or she selected is not displayed. If you select this feedback option, then the **Display Extended Feedback** option will not be available for individual questions.
  - Select **Incorrectly Answered Questions (Feedback Only) When Student Passes** to display only the feedback for incorrectly answered questions when the exam is PASSED. If the exam is failed, then only the incorrectly answered questions will be listed, without any feedback. If you select this feedback option, then the **Display Extended Feedback** option will not be available for individual questions.
  - Select **None** to display the achieved percentage score only.

6. In the **Printing Mode** list, select the condition under which students can print the test and test results:
  - Select **Always Print** to allow students to print the test and test feedback.
  - Select **Never Print** to prevent students from printing the test or test feedback. This is the default setting.
7. Leave the **Shuffle questions when this test is rendered** check box selected if you want to randomize question delivery each time a test is generated.
8. Select the **Shuffle answers when this test is rendered** check box if you want to randomize the order of answers for multiple-choice, drop-down choice, multiple select, matching, and true/false questions. **Note:** *Selecting the **Shuffle answers when this assessment is rendered** check box will randomize the order of answers for all applicable question types on the test. Select this check box only if you want to enable randomization across all questions. If any test questions use answers like all of the above or A and C, but not B, you should not select this option.*
9. Select the **Allow the student to pause this test** check box if you want a pause button to be placed on the test. If the student needs to leave a test before completing it, clicking Pause will prevent the test from automatically failing once the system times out. The student can return to the paused test at any time, and all previously answered questions will remain. **Note:** *You cannot enable the Pause feature if a time limit has been set for the test.*
10. In the **Introduction** text area, you can add an introduction to the test by typing the introductory message into the WYSIWYG editor. The introduction can be formatted using the editing tools.
11. Click **Save** to save test settings.

## TEST QUESTION SHUFFLE FUNCTIONALITY

When the Shuffle Questions setting on the *Test Settings* page is selected, test questions will be presented in randomized order (or, shuffled) each time a test is delivered. The Shuffle Questions option has no bearing on which questions are selected to appear on the test.

If the Shuffle Questions setting is not selected, then the order of the test questions selected to appear will be based on their order within the question group. If there are two or more question groups, questions will be ordered first by question group. If the number of allocated questions is less than the total number of questions in the question group, the system will randomly select which question from the group will appear on the test (after any mandatory questions in the group are selected).

**Note:** *In addition to shuffling questions, you can also edit test question settings so that the answers shuffle randomly.*

### HOW TESTS ARE RENDERED

When a student selects a test in a course, the system will first select any questions marked mandatory. If the number of allocated questions in a question group is greater than the number of mandatory questions, the system will randomly select additional questions from the group to present on the test. If there are no mandatory questions in the group, the system will randomly select all questions from the group to present in the test.

The number of questions presented in the test from each group will always be equal to the Allocated Questions setting on the Edit Group Settings page. However, if the number of mandatory questions is greater than the Allocated Questions setting, then all mandatory questions will be presented on the test. In other words, the Mandatory Question setting takes precedence over the Allocated Questions setting.

The following table describes the affect of the Shuffle Questions selection based upon different test question group scenarios.

**TQ** = Total number of questions in question group

**MQ** = Number of mandatory questions in question group

**AQ** = Number of questions allocated for use in the question group (selected from the Edit Group Settings page)

Group Setup	Selection	Enabled	Shuffle Questions Disabled
TQ > AQ	AQ will be randomly selected from the available TQ.	Questions will be displayed in random order.	AQ will be displayed in the order in which they appear in the assessment builder.
TQ = AQ	All TQ in the group will appear on the test.	AQ will be displayed in random order.	AQ will be displayed in the order in which they appear in the assessment builder.
TQ > AQ MQ = AQ	Only MQ in the group will appear on the test.	MQ will be displayed in random order.	MQ will be displayed in the order in which they appear in the assessment builder.

<p>TQ &gt; MQ AQ &gt; MQ</p>	<p>All MQ will appear on the test. The remaining AQ will be randomly selected from the available TQ.</p>	<p>All questions, including mandatory and randomly selected questions will be displayed in random order.</p>	<p>MQ will be displayed in the order in which they appear in the assessment builder then remaining AQ will be displayed according to the random order in which they were selected.</p>
<p>MQ &gt; AQ</p> <p>Note: The # of AQ will be increased to accommodate the number of MQ.</p>	<p>Only MQ in the group will appear on the test.</p>	<p>MQ will be displayed in random order.</p>	<p>MQ will be displayed in the order in which they appear in the assessment builder.</p>

### ★ Tips

- To preserve question order in a question group on a test, set the **Allocated Questions** setting on the *Edit Group Settings* page to equal the number of questions in the group. If this is not desirable, consider moving some of the questions into a separate question group using the move questions option.

## MANAGING TEST QUESTION GROUPS

Once all questions are added to a question group, you can manage the question group, including editing group settings.

## EDITING TEST QUESTION GROUP SETTINGS

If you are publishing a course that includes a test, you must specify the number of questions to include from at least one question group. If you do not, the course publishing request will fail.

### ➡ To edit group settings:

1. From the question group page, click **Edit Group Settings**. The *Question Group Settings* page displays.
2. In the **Name** box, change the group name, if desired.
3. In the **Description** text area, add a description, if desired.

4. In the **Questions from the Group to Include on Test** box, enter the number of questions to include from the group or click Use All if you want to use all of the questions in the group. **Note:** *You do not have to use all questions in a group for each test. For example, you may create 10 questions within a question group, but designate that only 5 of the 10 are to be used. If you select the Shuffle questions when this assessment is rendered check box on the Assessment Settings page, then each time the test is delivered a different combination of 5 questions out of the available 10 will be asked. If one or more questions are marked Mandatory, those questions will be used every time the test is delivered.*
5. Click **Save**.

## MARKING TEST QUESTIONS MANDATORY

If there are questions within the question group that you would like delivered each time the test is generated, you can mark the questions mandatory.

### To mark test questions mandatory:

1. From the question group page, select the check boxes in the **Mandatory** column for the desired questions.
2. Click **Update Mandatory**. The system informs you that the questions were updated successfully.

## MOVING TEST QUESTIONS

If you have more than one question group, you can move questions from one group to another.

### To move questions:

1. From the question group page, click **Move Questions**. The *Move Questions* page appears.
2. Select the check box(es) next to the question name(s) of the questions you want to move, or select the **Select All** check box.
3. Select the destination question group.
4. Select the **Take me to the destination group after the move is complete** check box if you want to automatically open that question group after saving the move.
5. Click **Save**.

## SORTING TEST QUESTIONS

You can have test questions delivered in a specific order.

**Note:** *You must clear the **Shuffle questions when this assessment is rendered** check box on the Assessment Settings page if you want to deliver questions in a specific order. If you do not clear this check box, question sorting will be overridden.*

### To sort questions:

1. From the question group page, click **Sort Questions**. The *Sort Questions* page appears.
2. Click the question name in the left-hand box for the question you wish to move.
3. Click the desired move button to place the question in the desired order.
4. Once all questions are positioned as desired, click **Save**.

## PREVIEWING A TEST

### ➔ To preview a test:

1. Clicking **Back** from a question group page returns you to the test level.
2. From this page you can preview the test as it will appear to students. Click **Preview Test**.
3. The test will generate as it appears to students.

## EDITING A TEST

A test can be edited at any time.

**Note:** *Editing a test will result in all of the data for that test being reset to zero on the Test Question Analysis Report. Specifically, if the text of the question, any answer, the indication of which answer is correct, the addition of an answer choice, or the removal of an answer choice, will cause a reset. If you wish to preserve that data, first run the Test Question Analysis Report and store the results, or consider versioning the course. This is because the system cannot distinguish between an edit that changed the meaning of the question or answer and an edit that merely fixed a typographical error. If the meaning was changed and the question count is not reset, the data on the reports would no longer be valid.*

### ➔ To edit a test:

1. Click the test name from the course learning activities listing. The *Test* page appears.
2. Make any or all of the following changes:
  - Click **Edit Settings** to edit the test settings, make the desired changes, and click **Save**.
  - Click the question group name to edit question group settings, make the desired changes, and click **Save**.
  - Click the question group name to edit a specific question, click the question name, make the desired changes, and click **Save**.
  - Click **Common Properties** to edit the common properties, make the desired changes, and click **Save**.
  - Add new question groups and questions, if desired.

**Note:** *If the edited test is within a published course, the course must be republished for edits to be activated.*

## DELETING A TEST

Tests can only be deleted prior to course publishing.

 **To delete a test:**

**Note:** To delete a test from a published course, you must create a new course version.

1. Click the test name from the course learning activities listing. The *Test* page appears.
2. Click **Common Properties**. The *Common Properties* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the test.

## EXPORTING AND IMPORTING TESTS AND EVALUATIONS

Tests and evaluations can be exported and stored outside the system (for example, on your desktop) and imported for use in the same or another course. Exported test and evaluation files can also be shared with other administrators via e-mail. This feature allows you to create test and evaluation templates using a standard format that can be edited for each use. Once imported into a new course, the test or evaluation can be edited as needed.

**Note:** Only test and evaluation files that were created in the HLC can be imported into the HLC.

### EXPORTING A TEST OR EVALUATION

1. Click the test or evaluation name from the course learning activities listing. The *Test* or *Evaluation* page appears.
2. Click **Export**.
3. Click **Save**. The *Save As* dialog appears.
4. Select the location to which you want to save the file.
5. Rename the file, if desired, preserving the .hte file extension.
6. Click **Save**. The file is now available outside the system. You can forward the file to another administrator via e-mail as an attachment if you choose.

### IMPORTING A TEST OR EVALUATION

1. Add a new test or evaluation to a course.
2. Complete and save the test/evaluation common properties. The *Test* or *Evaluation* page appears.
3. Click **Import**.
4. Browse for the desired test/evaluation file.
5. When you have located the file, highlight the file name and click **OK**.
6. Click **Load**. The *Assessment Import* page appears.

7. Select the **Import assessment settings** check box if you want to import the settings as per the original test/evaluation.
8. Select the **Overwrite existing question groups** check box if you want to overwrite the existing question groups within the new test/evaluation (such as the default group). If you choose to overwrite the question groups, then all question groups existing in the new test or evaluation will be deleted and replaced by those within the file being imported.
9. Clear any questions or question group check box(es) that you do not want to import. You may preview each question by clicking **Preview** to the right of each question. **Note:** *Once the import is completed, you can edit the test/evaluation settings and/or question groups.*
10. Click **Import**.
11. Click **OK**. You can now make any desired edits to the test/evaluation settings, question groups, or questions.

## GRANTING TEST/EVALUATION OVERRIDE PERMISSIONS

Administrators can grant permission for subsidiary affiliations to override and edit tests and evaluations. Without this permission, administrators at subsidiary levels cannot edit the tests or evaluations.

### To grant override permission for a test or evaluation within a course:

1. Be sure that the **Allow this learning activity to be overridden** check box is selected on the test/evaluation *Common Properties* page.
2. Prior to publishing the course, click **Permissions** from the *Course Builder* page.
3. Click **Add Affiliations**. The *Find Affiliations(s)* page appears.
4. Search for the affiliation to which you want to grant permission.
5. Click the affiliation name.
6. Select the **Allow subsidiary affiliations to access this course** check box.
7. Click **Save**.
8. To grant permissions to more than one affiliation, repeat the process above.

**Note:** *When permissions are granted, the permission allows for editing of all tests and evaluations within the course for which the **Allow this learning activity to be overridden** check box was selected.*

**Note:** *If you grant override permission and the subsidiary affiliation chooses to make edits to the test/evaluation, the course must be published by the affiliation for the edits to appear. Once published, the subsidiary owns the course that was overridden, and the original course remains intact at the higher level.*

## EVALUATIONS

## ADDING AN EVALUATION

Evaluations can be added to administrator-developed courses. By making learning activities sequential within the course, you can place the evaluation as the last learning activity so that students must first complete all other learning activities.

### To add an evaluation:

1. Search for the course to which you want to add an evaluation. The *Course Builder* page appears.
2. Click **Add an Evaluation**. The *Common Properties* page appears.
3. Enter the common properties.
4. Click **Save**. The evaluation editing page appears.
5. Click **Edit Settings**. The *Assessment Settings* page appears.
6. In the Introduction WYSIWYG editor, enter an introduction, if desired.
7. Click **Save**.

## ADDING EVALUATION QUESTIONS

### To add evaluation questions:

**Note:** Unlike tests, all questions placed within an evaluation question group will be used in the evaluation. You cannot mark an evaluation question as optional—all questions are mandatory.

1. Click **Default Group** to begin creating evaluation questions. The *Default Group* page appears. You can place all questions in this single group, or you can create multiple question groups by clicking **Add Group**. Each question group can be renamed and can include a description. **Note:** If multiple question groups are used in an evaluation, the question group names will be visible to students.
2. Click **Add Question**. The *Select a Question Type* page appears.
3. In the **Select a question type** list, select one of the evaluation question types:
  - **True/False**
  - **Multiple Choice**
  - **Drop-Down Choice**
  - **Multiple Select**
  - **Likert Scale**
  - **Free Text**
  - **Matching**

4. Click **Continue**.

Click the links below for details about adding each type of question and for managing a question group once all questions are added.

## ADDING A TRUE/FALSE EVALUATION QUESTION

### To add a True/False evaluation question:

1. In the **Select a question type** list, select **True/False**.
2. Click **Continue**. The *True/False question* page appears.
3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.
6. In the **Order** lists, change the order in which the answers will display, if desired.
7. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
  - Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.
8. You may preview the new question by clicking **Preview**. The question appears in a preview window.

### Tips

- You can edit the default True/False answers to other answer options that may be more appropriate to your question, such as Yes/No, Correct/Incorrect, or other word opposites.

## ADDING A MULTIPLE CHOICE EVALUATION QUESTION

A multiple choice question allows the student to make only one answer choice within the evaluation. All answers appear as a list of options below the questions.

**Note:** *The drop-down choice question functions identically to the Multiple Choice question, with the exception that the answer choices are presented in a drop-down menu on the evaluation.*

### To add a Multiple Choice evaluation question:

**Note:** *You must add at least two answers to a multiple choice question.*

1. In the **Select a question type** list, select **Multiple Choice**.
2. Click **Continue**. The **Multiple Choice question** page appears.

3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.
6. Click **Add New Answer**. The *Answer* page appears.
7. In the **Answer Text** editing area, enter the answer text.
8. Do one of the following:
  - Click **Continue and Add Another** if you wish to add more answers to this question. You are returned to the *Answer* page. Repeat the steps described above for adding answers.
  - Click **Continue** if this is the final answer you wish to add. You are returned to the question page.
9. In the **Order** lists, change the order in which the answers will display, if desired.
10. Click **Edit** if you want to edit the answers or to add rationale.
11. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
  - Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.
12. You may preview the new question by clicking **Preview**. The question appears in a preview window.

## ADDING A DROP-DOWN CHOICE EVALUATION QUESTION

A drop down choice question allows the student to make only one answer choice within the evaluation. All answers are displayed in a drop-down menu on the evaluation.

**Note:** *The multiple choice question functions the same as a drop-down choice question except that all answers are displayed as a list of options below the question.*

### **To add a drop-down choice evaluation question:**

**Note:** *You must add at least two answers to a drop-down choice question.*

1. In the **Select a question type** list, select **Drop-Down Choice**.
2. Click **Continue**. The *Drop-Down Choice question* page appears.
3. In the **Question Name** box, enter the question name.

4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.
6. Click **Add New Answer**. The *Answer* page appears.
7. Click **Edit** if you want to edit the answers.
8. Do one of the following:
  - Click **Continue and Add Another** if you wish to add more answers to this question. You are returned to the Answer page. Repeat the steps described above for adding answers.
  - Click **Continue** if this is the final answer you wish to add. You are returned to the question page.
9. In the **Order** lists, change the order in which the answers will display, if desired.
10. Click **Edit** if you want to edit the answers.
11. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
  - Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.
12. You may preview the new question by clicking **Preview**. The question appears in a preview window.

## ADDING A MULTIPLE SELECT EVALUATION QUESTION

A multiple select question allows for more than one correct answer to a single question. Students make their selections by clicking check boxes on the test and must select all correct answers to correctly answer the question.

### To add a multiple select test question:

**Note:** You must add at least two answers to a multiple select question.

1. In the **Select a question type** list, select **Multiple Select**.
2. Click **Continue**. The *Multiple Select question* page appears.
3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.
6. Click **Add New Answer**. The *Answer* page appears.

7. In the **Answer Text** editing area, enter the answer text.
8. Do one of the following:
  - Click **Continue and Add Another** if you wish to add more answers to this question. You are returned to the Answer page. Repeat the steps described above for adding answers.
  - Click **Continue** if this is the final answer you wish to add. You are returned to the question page.
9. In the **Order** lists, change the order in which the answers will display, if desired.
10. Click **Edit** if you want to edit the answers.
11. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
  - Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.
12. You may preview the new question by clicking **Preview**. The question appears in a preview window.

#### ★ Tips

- You may wish to add a hint to your question text so that students will know that they may select more than one answer to the question. For instance, you may add the statement: *Check all pertinent answers.*

## ADDING A MATCHING EVALUATION QUESTION

Matching questions allow you to provide a list of items, and allow students to select the appropriate item match from a corresponding list.

### ➡ To add a matching evaluation question:

**Note:** You must add at least two answers to a matching question.

1. In the **Select a question type** list, select **Matching**.
2. Click **Continue**. The *Matching question* page appears.
3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.
6. Click **Add New Answer**. The *Answer* page appears.
7. Select the **Use match text as distractor (item text is not required)** check box if you want to add an additional selection in the answer list that has no item match.

8. In the **Answer Text** editing area, enter the answer text. Leave blank if you selected the **Use match text as distractor check box** in the previous step.
9. In the **Match** box, enter the match. If you selected the **Use match text as distractor** check box, then enter the match distractor. Matches must be unique. Using the same match for more than one item may result in question scoring errors.
10. In the **Rationale** editing area, enter the rationale, if desired.
11. Do one of the following:
  - Click **Continue and Add Another** if you wish to add more answers to this question. You are returned to the Answer page. Repeat the steps described above for adding answers.
  - Click **Continue** if this is the final answer you wish to add. You are returned to the question page.
12. In the **Order** lists, change the order in which the answers will display, if desired.
13. In the **Correct** column, change the correct answer if you desire.
14. Click **Edit** if you want to edit the answers or to add rationale.
15. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
  - Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.
16. You may preview the new question by clicking **Preview**. The question appears in a preview window.

## ADDING A LIKERT SCALE EVALUATION QUESTION

Likert Scale questions are found in evaluations and not in tests. Likert Scale questions measure how significantly a user agrees or disagrees with a statement.

### To create a Likert Scale evaluation question:

**Note:** You must add at least two answers to a Likert Scale question.

1. In the **Select a question type** list, select **Likert Scale**.
2. Click **Continue**. The *Likert Scale question* page appears.
3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.

6. Click **Add New Answer**. The *Answer* page appears.
7. In the **Answer Text** editing area, enter one possible answer. **Note:** *Do not use numbers or numeric values in the Answer Text field. Use a word or phrase describing the possible response such as Excellent, Good, Fair, Poor or Highly Effective, Effective, Somewhat Effective or Not Effective.*
8. In the **Weight** box, add the answer weight. The default is 1. If answer weight is used, the Evaluation Scores by Course report multiplies the number of times an answer is selected by the weight assigned to the answer. This calculation appears in the **Response Value** column for each Likert Scale question. For example, the answer text may be *Excellent*, with a weight of 4. The next answer text may be *Good*, with a weight of 3. The third answer may be *Fair*, with a weight of 2, and the final answer *Poor* with a weight of 1.
9. Do one of the following:
  - Click **Continue and Add Another** if you wish to add more answers to this question. You are returned to the Answer page. Repeat the steps described above for adding answers.
  - Click **Continue** if this is the final answer you wish to add. You are returned to the question page.
10. In the **Order** lists, change the order in which the answers will display, if desired.
11. Click **Edit** if you want to edit the answers.
12. Do one of the following:
  - Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
  - Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.
13. You may preview the new question by clicking **Preview**. The question appears in a preview window.

## ADDING A FREE TEXT EVALUATION QUESTION

➔ **To add a free text evaluation question:**

1. In the **Select a question type** list, select **Free Text**.
2. Click **Continue**. The **Free Text** question page appears.
3. In the **Question Name** box, enter the question name.
4. In the **Question Text** editing area, enter the question text into the WYSIWYG editing window, using desired formatting tools.
5. In the **Custom Identifier** box, enter text that identifies this question, if desired.
6. In **Display text box as**, select *Single line* to limit the amount of text added to the student's answer or *Multiple line* for unlimited text responses.

7. Do one of the following:

- Click **Save and Add Another** if you wish to add more questions to this question group. You are returned to the *Select a Question Type* page.
- Click **Save** if this is the final question you wish to add. You are returned to the *Default Group* page.

8. You may preview the new question by clicking **Preview**. The question appears in a preview window.

## MANAGING EVALUATION QUESTION GROUPS

Once all questions are added to a question group, you can manage the question group, including editing group settings.

### EDITING EVALUATION QUESTION GROUP SETTINGS

 **To edit group settings:**

1. From the question group page, click **Edit Group Settings**. The *Question Group Settings* page displays.
2. In the **Name** box, change the group name, if desired.
3. In the **Description** text area, add a description, if desired.
4. Click **Save**.

### MOVING EVALUATION QUESTIONS

If you have more than one question group, you can move questions from one group to another.

 **To move questions:**

1. From the question group page, click **Move Questions**. The *Move Questions* page appears.
2. Select the check boxe(es) next to the question name(s) of the questions you want to move, or select the **Select All** check box.
3. Select the destination question group.
4. Select the **Take me to the destination group after the move is complete** check box if you want to automatically open that question group after saving the move.
5. Click **Save**.

### SORTING EVALUATION QUESTIONS

You can have evaluation questions delivered in a specific order. It is not possible to deliver questions in random order.

 **To sort questions:**

1. From the question group page, click **Sort Questions**. The *Sort Questions* page appears.
2. Click the question name in the left-hand box for the question you wish to move.
3. Click the desired move button to place the question in the desired order.
4. Once all questions are positioned as desired, click **Save**.

## PREVIEWING AN EVALUATION

 **To preview an evaluation:**

1. Clicking **Back** from a question group page returns you to the evaluation level.
2. From this page you can preview the test as it will appear to students. Click **Preview Evaluation**.
3. The evaluation will generate as it appears to students.

## EDITING AN EVALUATION

An evaluation can be edited at any time.

**Note:** *Editing a question or an answer will result in the counts for the question, as they appear on the Evaluation Scores Report, being reset to zero. If you wish to preserve that data, first run the Evaluation Scores Report and store the results, or consider versioning the course. This is because the system cannot distinguish between an edit that changed the meaning of the question or answer and an edit that merely fixed a typographical error. If the meaning was changed and the question count is not reset, the data on the reports would no longer be valid.*

 **To edit an evaluation:**

1. Click the evaluation name from the course learning activities listing. The *Evaluation* page appears.
2. Make any or all of the following changes:
  - Click **Edit Settings** to edit the evaluation settings, make the desired changes, and click **Save**.
  - Click the question group name to edit question group settings, make the desired changes, and click **Save**.
  - Click the question group name to edit a specific question, click the question name, make the desired changes, and click **Save**.
  - Click **Common Properties** to edit the common properties, make the desired changes, and click **Save**.
  - Add new question groups and questions, if desired.

**Note:** *If the edited evaluation is within a published course, the course must be republished for edits to be activated.*

## DELETING AN EVALUATION

Evaluations can only be deleted prior to course publishing.

### To delete an evaluation:

**Note:** To delete an evaluation from a published course, you must create a new course version.

1. Click the evaluation name from the course learning activities listing. The *Evaluation* page appears.
2. Click **Common Properties**. The *Common Properties* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the evaluation.

## VIDEO LEARNING ACTIVITIES

### ADDING A VIDEO LEARNING ACTIVITY

You can add a HealthStream Video-hosted video to a course by creating a video learning activity. Before creating a video learning activity, be sure that you have uploaded the video you plan to use to HealthStream Video).

### To add a video learning activity to a course:

1. Log on to HealthStream Video and generate the embed code for the video you want to use in the learning activity.
  - Be sure to click the **Copy** button to copy the embed code.
2. Log on to the HLC.
3. Search for the course to which you want to add the learning activity.
4. Click the course name from the search results list to open the course builder.
5. Click the **Add a Video Activity** link to open the *New Video* form.
  - If the course has been published, you must create a new version of it before you can add learning activities.
  - Required fields are indicated with an asterisk (\*).
  - To paste the embed code that you copied from HealthStream Video, click inside the **Embed Code** box, and press the V key on your keyboard while holding down the CTRL key.
6. Click **Save**.

## SHARING COURSES

You can send students a link to a course in an email message. When students click the link, the details page for that course will open.

The link that you share will only work for students in your organization who have access to the course whose link you send: if the course is available for self-enrollment, the student must have access to the Course Catalog; if the course is available only through assignment, it must already be on his or her To-Do List. Students who do not have access to the course will see a message instructing to contact an administrator.

The link will only open the student view of the course details page, even if you send it to another administrator. Administrators who do not have a student account in the system will not be able to view the course details page.

Users must be logged in to the system to open the link; those who are not will be directed to the login page first. After they log in, the course details page will open. Users who belong to more than one institution will be logged into the institution from which the link was generated.

A course must be published for a link to be able to be generated. The link will always open the most recent version of the course.

### **To generate a link to share course information:**

1. Click the **Courses** tab to open the Courses page.
2. Click the **Manage Courses** link (in the **Course Management** section) to open the Browse for a Course page.
3. Search for the course that you want to share. You can search alphabetically, by category, or by keyword.
4. From the search results, click a course name to open the Course Builder page.
5. Click the **Share** link at the top of the page to open the course URL box.
6. Copy the URL in the box. You can now paste it into an email message.

# Course Bundles

## COURSE BUNDLES

Course bundles enable you to group courses together for quick assignment and reporting. If there are courses that you frequently assign together, creating a course bundle can reduce the time spent searching for and selecting courses to add to an assignment or report.

When you are creating an assignment or selecting courses for a report, selecting a course bundle has the same effect as selecting all of the courses that it contains. For example, say that you have created a course bundle called *Safety* that contains the courses *Back Safety*, *Electrical Safety*, *Fire Safety*, and *General Safety*. When you need to add these courses to a new assignment, you could search for and select each of them separately, but searching for and selecting the *Safety* course bundle would produce the same result in much less time.

You may be familiar with the curriculum feature, which also enables you to assign several items as a unit. Here are some of the principal differences between curricula and course bundles:

- Curricula can contain courses or equivalents (or both). Course bundles can only contain courses.
- When you create a curriculum, you can specify the order in which students must complete items. This is not possible with course bundles: students can complete the courses in any order they like.
- Curricula must be published before they are available for use in the system. Course bundles do not need to be published.
- If you add or remove items from a curriculum, you must first create a new version and then republish it for your changes to take effect. You do not need to version and republish course bundles.
- Students who are assigned a curriculum see it on their To-Do List. Students who are assigned a course bundle do not see it on their To-Do List—they only see the courses that make up the bundle.

Adding or removing courses from a course bundle has no effect whatsoever on previous assignments of that course bundle. For example, say that, last week, you assigned the *Safety* course bundle described above to ten students. If you remove the *General Safety* course today, those ten students will still have the original four courses on their To-Do List. If you assign the edited course bundle to five more students today, those students will only have three courses (*Back Safety*, *Electrical Safety*, and *Fire Safety*) on their To-Do List.

Course bundles cannot be added to the Course Catalog for student self-enrollment; they are only available to administrators to assign.

## CREATING COURSE BUNDLES

**To create a course bundle:**

1. Click the **Courses** tab to open the Courses page.
2. Click the **Create Course Bundle** link (in the **Course Management** section) to open the Add a Course Bundle page. An asterisk (\*) indicates required information.
3. Type a name for the course bundle in the **Name** box.

4. If needed, type a description for the course bundle in the **Description** box.
5. If you want administrators at subsidiary institutions to be able to use the course bundle, leave the **Make this course bundle visible to subsidiary institutions** check box selected.
6. If you do not want the course bundle to be available for making assignments and running reports, select the **Do not allow this course bundle to be visible to assignments and reporting** check box.
7. Select the courses that you want to include in the course bundle.
  - 7.1. Click the **Add Courses** link to open the Browse for a course page.
  - 7.2. Search for courses to include in the course bundle. You can search alphabetically, by category, or by keyword.
  - 7.3. From the search results, select the check box next to the courses that you want to add to the course bundle.
  - 7.4. Click the **Select** button to add the courses and return to the Add a Course Bundle page.
  - 7.5. If necessary, repeat steps 7.1 – 7.4 until you have added all necessary courses.
8. Click the **Save** button to save the course bundle.

## ASSIGNING COURSE BUNDLES

Course bundles are assigned just like courses, curricula, and equivalents (see [Adding a Group Assignment](#) and [Adding an Individual Assignment](#) for more information on assignments). There is a **Course Bundles** filter on the Browse page to help you locate course bundles to assign.

---

[Alphabetical](#) | [Category](#)

Course    **Course Bundles**    Curriculum    Equivalent

---

When you select a course bundle, you will notice that its name does not appear on the add an assignment or report criteria page, but rather the courses that it contains are displayed. In the illustrations below, the *Safety* course bundle was selected, which contains the courses *Back Safety*, *Electrical Safety*, *Fire Safety*, and *General Safety*.

## Group Assignment Browse

[Alphabetical](#) | [Category](#)



Course  Course Bundles  Curriculum  Equivalent

Results per page:  ▾

Name

Safety

### Selecting the course bundle.

#### Courses or Curricula or Equivalents

[Select](#)

To require students to complete a Course or Curriculum or Equivalent specifically for this institution, click the checkbox at the right of the item.

Back Safety

\* Exemptions

Electrical Safety

\* Exemptions

Fire Safety

\* Exemptions

General Safety

\* Exemptions

### How the courses appear on the Add an Assignment page.

## EDITING COURSE BUNDLES

Editing a course bundle has no effect on previous assignments that used that course bundle.

### To edit a course bundle:

1. Click the **Courses** tab to open the Courses page.
2. Click the **Manage Course Bundles** link (in the **Course Management** section) to open the Course Bundle Search page.
3. In the **Name** box, type all or part of the name of the course bundle that you want to edit.
4. Click the **Search** button.
5. From the search results, click a course bundle's name to open the Edit Course Bundle page.
6. Make any necessary changes.
7. Click the **Save** button to save the changes.

## DELETING COURSE BUNDLES

Deleting a course bundle has no effect on previous assignments that used that course bundle.

### To delete a course bundle:

1. Click the **Courses** tab to open the Courses page.
2. Click the **Manage Course Bundles** link (in the **Course Management** section) to open the Course Bundle Search page.
3. In the **Name** box, type all or part of the name of the course bundle that you want to delete.
4. Click the **Search** button.
5. From the search results, click a course bundle's name to open the Edit Course Bundle page.
6. Click the **Delete** button.
7. When you are prompted to confirm the deletion, click **OK**.

# Curricula

## CURRICULA OVERVIEW

A curriculum is a group of two or more courses or equivalents. Curricula are developed and published, and then can be assigned or made available for self-enrollment.

Curricula can be created requiring the learning items within the curriculum (that is, courses and/or equivalents) to be taken in sequential order, thus establishing prerequisite requirements for completion. Curricula can also be set to allow students to complete the learning items in whatever order they choose.

An effective date can be set for each of the learning items within a curriculum. There are two types of effective dates: Relative and Fixed.

- **Relative effective date:** The date is established when a student enrolls in a course or equivalent that is part of the curriculum. **Note:** *Generally, enrollment occurs when a student clicks the **Enroll** button for a course or equivalent on the Curriculum Details page. In some cases, an existing course enrollment or completion may be bridged to a curriculum if the enrolled or completed course is also within the curriculum, depending on the sequential completion setting.*
- **Fixed effective date:** The effective date for all items in a curriculum is the effective date of the curriculum assignment.

Learning events can satisfy courses within a curriculum as long as the completion date of the learning event falls within the course effective date inside the curriculum and has a completion date in proper sequence if the curriculum requires sequential completion of learning items.

Assignments that include curricula can also include separate, single courses, or equivalents. This gives administrators maximum flexibility for designing education while incorporating choice for the learners where appropriate.

While continuing education (CE) credit cannot be added to a curriculum, it can be added to courses within a curriculum.

## OVERVIEW OF CURRICULUM RULES

### Exemptions

The following rules apply to exemptions.

- When an exemption date is entered for a course or equivalent within a sequential curriculum, it does not have to fall in sequential order.
- When a course belongs to a curriculum and also belongs to an equivalent within the same curriculum, an exemption made to the course is not bridged to the course within the equivalent, even though the equivalent is part of the same curriculum. The student would either need to complete one of the courses in the equivalent or be exempted from the equivalent.
- Exemptions are assignment-specific, and the system automatically checks to see that the date entered falls between the start date and end date.

### **MATCHING ASSIGNMENTS AND ENROLLMENTS TO A NON-SEQUENTIAL CURRICULUM**

A non-sequential curriculum will observe existing stand-alone course assignments and enrollments when the course exists within the curriculum. If the course is assigned, progress in the course will synchronize with the course instance inside the non-sequential curriculum. This will occur if the status of the assigned course is *Assigned*, *Not Yet Started*, *In Progress*, or *Past Due*. If the course is electively enrolled, the non-sequential curriculum will absorb that enrollment, reducing duplication on the *My Learning* page.

**Note:** *This does not apply to sequential curricula or equivalents.*

This also works for courses that appear in two or more curricula that are assigned and/or self-enrolled. In these cases the progress of the course is synchronized between the non-sequential curriculum and the other curriculum (or curricula).

### **MATCHING COMPLETIONS TO AN EQUIVALENT**

If two or more qualifying completions exist for an equivalent (or courses within the equivalent) within a curriculum, the system will bridge to the latest qualifying course completion to satisfy the equivalent within the curriculum.

### **EDITING COMPLETION DATES**

When a course completion or exemption is edited and it is bridged to learning items within one or more curricula, each curriculum will be re-evaluated to ensure the new date still satisfies the curriculum learning item. If the completion no longer satisfies the learning item in the curriculum, the system will look for another qualifying completion to take its place. If no qualifying completion is found, the learning items within each curriculum will require completion or exemption.

**Note:** *Exemptions are assignment-specific to one course.*

### **DELETING COMPLETIONS AND EXEMPTIONS**

When a course completion or exemption is deleted and it is bridged to learning items within one or more, the system will look for another qualifying completion to take its place. If no qualifying completion is found, the learning items within each curriculum will require completion or exemption.

**Note:** *Exemptions are assignment-specific to one course.*

**Note:** *It is possible for a completed curriculum to move from the My Transcript page back to the My Learning page as a result of a completion being deleted or decoupled.*

### **SAMPLE CURRICULUM**

#### **Curriculum Name: Annual Safety Training**

Curriculum Elements (set to be completed in sequential order):

- General Safety Course
- Back Safety Course (Back Safety PA or Back Safety non-PA Course)
- Electrical Safety Course
- Fire Safety Course

In the example above, students must complete four courses in the prescribed order, but can choose which of the Back Safety courses they wish to complete.

Assignments that include curricula can also include separate, single courses or equivalents. This gives administrators maximum flexibility for designing education, while incorporating choice for the learners where appropriate.

## ADDING A CURRICULUM

Adding a curriculum contains two steps: creating the curriculum and adding courses and/or equivalents to the curriculum. You can add as many courses and equivalents as necessary.

### CREATING THE CURRICULUM

1. On the **Courses** tab, click **Add a Curriculum**. The *Curriculum Properties* page appears.
2. In the **Curriculum Name** box, enter the curriculum name.
3. In the **Description** box, enter a description of the curriculum.
4. Click **Select Categories** to select the default categories for the curriculum. Available categories are the same as those used for courses.
5. Select the check box(es) next to one or more categories. Subcategories will be revealed, if available, by clicking the + to the left of a category name.
6. Click **Select**. The system returns you to the *Add a Curriculum* page with the categories you selected in the **Default Categories** box.
7. In the **Certificate Template** list, select a certificate template.
8. In the **Keywords** text area, enter keywords to assist students and administrators in curriculum searches. Separate multiple keywords with commas.
9. In the **Development Status** list, select the development status. Available statuses are the same as those used for courses.
10. Select the **Curriculum content completed sequentially** check box if you wish to create prerequisite delivery of curriculum items. Leaving the box cleared will allow students to complete the courses or equivalents in random order. When you select the **Curriculum content completed sequentially** check box, sequential completion takes precedence over course effective dates. For a qualifying completion to be bridged to a course or equivalent within the curriculum, the completion must have occurred within the designated sequential completion order for the learning item, as well as be dated on or after the designated effective date for that learning item within the curriculum.
11. Do one of the following:
  - Click **Save**. The *Curriculum Builder* page appears.
  - Click **Save and Add Another** if you wish to add an additional curriculum. A new *Curriculum Properties* page appears.

You will need to come back and add courses or equivalents to the curriculum before you can publish it or assign it. The **Save and Add Another** button is provided so administrators can choose how they want to work; either create the names and properties for several curricula at one time, or build a curriculum from start to finish, including adding courses and equivalents.

**Note:** To return to the original curriculum, you must return to the **Courses** tab and click **Manage Curricula**.

From the *Curriculum Builder* page, you can now add courses or equivalents to the curriculum.

### **ADDING COURSES TO THE CURRICULUM**

1. Search for the curriculum to which you want to add the course. The *Curriculum Builder* page appears.
2. Click **Add a Course**. The *Course Search* page appears.
3. Perform a course search. Search by title, keyword, alphabetically or by category. A list of all courses matching your search criteria appears.
4. Click the name of the course you wish to add. The *Course Properties* page appears.
5. In the **Course Properties** box, click **Preview** to view course details, including learning objectives and associated continuing education (CE) credit, if applicable.
6. Select the **Use the effective date from any assignments of this curriculum** check box if you want the assignment effective date of the curriculum to apply to the course. A course completion found after the assignment effective date will satisfy the course within the curriculum. When you select the **Curriculum content completed sequentially** check box, sequential completion takes precedence over course effective dates. For a qualifying completion to be bridged to a course or equivalent within the curriculum, the completion must have occurred within the designated sequential completion order for the learning item, as well as be dated on or after the designated effective date for that learning items within the curriculum.
7. In the **Effective Date (Recognize completion up to)** box, enter an effective date for the course in days. The effective date is the number of days prior to course enrollment that the system will recognize course completion. The default is 0, which means only prior completions that happened on the day of enrollment will apply to the course. This feature will allow the system to recognize course completion when a student takes the curriculum as elective learning. It will also apply to assigned curricula where the **Use the effective date from any assignments of this curriculum** check box is not selected. When you select the **Curriculum content completed sequentially** check box, sequential completion takes precedence over course effective dates. Any existing completions that fall within the effective date range must also be in sequence relative to the curriculum.
8. The **Allow students to register for classes even if they have not completed all prerequisites** check box is selected by default so students can plan their schedules and reserve seats in classes in advance. Understand that when a student registers for a class they are enrolled in the course that contains that classroom activity, which means a student could take a course out of order in a sequential curriculum when this check box is left selected. If you do not want to allow students to register for classes before completing all courses prior to the course with the classroom learning activity, clear this check box. Clearing the check

box will prevent students from completing any courses out of order in a sequential curriculum. If you are not creating a sequential curriculum, leave this box selected.

9. Do one of the following:

- Click **Save** to save the effective date.
- Click **Save and Add Another** to save the effective date and add another course to the curriculum. If you choose to add more courses, then follow steps 2 through 8 until all desired courses have been added.

**Note:** You may delete the course from the curriculum by clicking *Delete* in the lower left-hand corner of the *Course Properties* page.

### **After you have added all of the courses and equivalents**

1. In the left-hand navigation pane, drag courses to position them as desired.
2. Prior to publishing the curriculum, the curriculum properties can be edited, and courses and equivalents can be added or deleted.
3. After you have developed the curriculum, you must publish it for use.

### **ADDING EQUIVALENTS TO THE CURRICULUM**

1. Search for the curriculum to which you want to add the equivalent. The *Curriculum Builder* page appears.
2. Click **Add an Equivalent**. The *Browse for an Equivalent* page appears.
3. Perform an equivalent search. Search by title, keyword, alphabetically or by category. A list of all equivalents matching your search criteria appears.
4. Click the name of the equivalent you wish to add. The *Equivalent Properties* page appears.
5. In the **Effective Date (Recognize completion up to)** box, enter an effective date for the equivalent in days. The effective date is the number of days prior to equivalent enrollment and course enrollment that the system will recognize equivalent or equivalent course completion. The default is 0, which means only prior completions that happened on the day of enrollment will apply to the equivalent. This feature will allow the system to recognize equivalent completion or completion of a course within the equivalent when a student takes the curriculum as elective learning. It will also apply to assigned curricula where the Use the effective date from any assignments of this curriculum check box is not selected. The equivalent or a course within the equivalent that was completed after the relative effective date will satisfy the equivalent within the curriculum. The system will first look for equivalent completion, and if no equivalent completion is found after the relative effective date, the system will look for completion of the course selected by the student within the equivalent. When you select the **Curriculum content completed sequentially** check box, sequential completion takes precedence over equivalent effective dates. Any existing completions that fall within the effective date range must also be in sequence relative to the curriculum.

6. Do one of the following:

- Click **Save** to save the effective date.
- Click **Save and Add Another** to save the effective date and add another equivalent to the curriculum. If you choose to add more courses, then follow steps 2 through 7 until all desired courses have been added.

**Note:** You may delete the equivalent from the curriculum by clicking *Delete* in the lower left-hand corner of the *Course Properties* page.

After you have added all of the courses and equivalents

1. In the left-hand navigation pane, drag courses to position them as desired.
2. Prior to publishing the curriculum, the curriculum properties can be edited, and courses and equivalents can be added or deleted.
3. After you have developed the curriculum, you must publish it for use.

#### ★ Tips

- Consider creating a special category and sub-categories for curricula.
- Consider creating a certificate template especially for curricula.

## PUBLISHING A CURRICULUM

Publishing makes a curriculum available for assignment and, if desired, for elective enrollment. Prior to publishing you may preview the curriculum by clicking *Preview* in the upper right-hand corner of the *Curriculum Builder* page.

**Note:** Once a curriculum is published, you cannot add, delete or rearrange the courses or equivalents within the curriculum.

#### 🔄 To publish a curriculum:

1. Search for the curriculum that you want to publish. The *Curriculum Builder* page appears.
2. Click **Publish**. The *Publish* page appears.
3. In the **Development Status** list, select the development status of the curriculum.
4. You can now choose between **Quick Publish** or **Advanced Publish**. *Quick Publish* allows the curriculum to be published to the entire institution using a common set of publishing properties. *Advanced Publish* allows publishing properties to be customized for specific subsidiary affiliations.

### PUBLISHING THE CURRICULUM WITH QUICK PUBLISH

If you wish to publish the curriculum to the entire institution using a common set of publishing properties, use the Quick Publish feature.

#### To publish a curriculum with Quick Publish

Make the desired selections under *Quick Publish*.

1. Leave the **This curriculum can be used by subsidiary affiliations** check box selected if you want the curriculum to be available for use by administrators in subsidiary affiliations with access to curriculum building or assignments features.
2. Leave the **This curriculum can be used for enrollment (assignment and/or class registration)** check box selected if you want the curriculum to be available for administrator delivery to students via group or individual assignment or by class registration.
3. Leave the **This curriculum can be used in Reports** check box selected if you want the curriculum available for inclusion in reports.
4. Leave the **Students may self-enroll from the Catalog tab** check box selected if you want the curriculum available to be taken as an elective.
5. Leave the **This version is the active version of this curriculum at the selected affiliation(s)** check box selected if you want the curriculum to be active in the system.
6. Select the **Un-enroll and re-enroll students that are currently enrolled but have not completed any version of this curriculum** check box if you want the system to un-enroll and re-enroll students when publishing subsequent curriculum versions.
7. Click **Quick Publish**. A warning page appears.
8. Click **Confirm**. A curriculum publish request is submitted.
9. To view the status of your publish request, click **Go to Request Manager**.

### **PUBLISHING THE CURRICULUM WITH ADVANCED PUBLISH**

If you wish to publish a curriculum to specific subsidiary affiliations only, or if you wish to customize the publish settings for subsidiary affiliations, use the Advanced Publish feature.

#### **To publish a curriculum with Advanced Publish**

1. Click **Advanced Publish**. A warning page appears.
2. Click **Add Affiliations to Receive Curriculum**. The *Find affiliation(s)* page appears.
3. Search your organizational hierarchy for the desired subsidiary affiliation(s) using alphabetical, word search, or hierarchy search.
4. Click **Search**. The search results appear in the search results box.
5. In the search results box, select the check box(es) next to the name(s) of the subsidiary affiliation(s) to which you wish to publish.
6. Click **Select**. The selected affiliations will appear in the hierarchy tree on the left.

7. Click the name of each affiliation. The standard publishing settings appear (see **Quick Publish** earlier in this document). Select the desired settings for the affiliation.
8. Click **Save Settings**. A warning page appears. If more than one affiliation has been selected, repeat steps 6 and 7 for each affiliation.
9. Click **Continue**. A curriculum publish request will be submitted.
10. To view the status of your publish request, click **Go to Request Manager**.

## REPUBLISHING A CURRICULUM

If edits are made to a published curriculum, the curriculum must be republished to activate changes.

### **To republish a curriculum:**

1. Search for the curriculum that you want to republish. The *Curriculum Builder* page appears.
2. Make desired edits to the curriculum.
3. Click **Publish**. The publish page appears.
4. Click **Republish**.
5. Click **Continue**. If you choose, you can use the **Quick Publish** or **Advanced Publish** options to change the publish settings for the curriculum.

**Note:** By default, the **Un-Enroll and Re-enroll Students that are currently enrolled but have not completed any version of this curriculum** check box is not selected. Selecting the box will require students to be re-enrolled in the curriculum. Students will not have to re-take any courses in the curriculum that they have completed unless the course effective date within the curriculum is changed to a date after the original course completion. In-progress courses will need to be restarted.

## SEARCHING FOR A CURRICULUM

### **To search for a curriculum:**

1. On the **Courses** tab, click **Manage Curricula**. The *Browse for a Curriculum* page appears.
2. Conduct a curriculum search. Search alphabetically, by category, whole word or partial word + wildcard. You can also narrow your search by selecting a development status and selecting the corresponding check boxes. By default, curricula marked *Retired* are filtered out of your search criteria, however, you can select to include retired curricula by selecting the check box. You may also choose only retired curricula by clearing all other development status check boxes. **Note:** You can also select the **Include All Versions** check box to search for all versions (not just the currently active version) of the curriculum.
3. Click **Search**. The system will return a listing of all curricula that match your search criteria.
4. Click the name link of the desired curriculum. The *Curriculum Builder* page appears.

## EDITING A CURRICULUM

Curricula can be edited as needed. You can edit a curriculum at any time as long as the curriculum has not been published. If the curriculum has been published, it must be republished after edits are made to activate the changes.

Students enrolled in a course or equivalent that is republished will be subject to the same un-enroll and re-enroll rules, no matter if the student enrolled in the course on its own or as part of a curriculum.

### To edit a curriculum:

1. Search for the curriculum that you want to edit. The *Curriculum Builder* page appears.
2. Make desired edits to the curriculum.
3. Click **Save**. If the curriculum was previously published, it must be republished to activate changes.

**Note:** You cannot add, delete or rearrange courses or equivalents within a curriculum that has already been published. To add, delete or rearrange courses or equivalents, you must create a new curriculum version.

## COPYING A CURRICULUM

You may choose to copy a curriculum when you need to create a new curriculum quickly using components of an existing published curriculum.

### **COPYING A CURRICULUM VS. CREATING A NEW CURRICULUM VERSION**

Copying a curriculum is a shortcut for adding a new curriculum. The feature is designed to let you use an existing curriculum as a time-saving template. When a curriculum is copied, the courses and/or equivalent in the original curriculum are also mapped to the new curriculum. The courses and equivalents themselves are not copied (changes to any course would be reflected in both curricula).

Since the copied curriculum is not related to the original, the copy will not substitute for the original in assignments, exemptions, or reports. If you need to make changes to an existing curriculum and wish to keep assignments, exemptions, and reporting unchanged, you should consider creating a new curriculum version instead.

### To copy a curriculum:

1. Search for the published curriculum that you want to copy. The *Curriculum Builder* page appears.
2. Click **Copy Curriculum**. A confirmation prompt appears. **Note:** After you click **OK** to confirm, the new curriculum will be created in your system. Click **OK** only if you are certain you wish to create a copy of this curriculum.
3. Click **OK**.
4. The *Curriculum Properties* page for the new curriculum will be displayed in Curriculum Builder. The name of the new curriculum will be the original curriculum name with the word *COPY* appended to the end.
5. Change the curriculum name as needed.
6. Modify the new curriculum's properties as needed and publish when ready.

**Note:** The development status of the new curriculum is automatically set to *In Development*. The curriculum version is set to one, regardless of what the original curriculum's version was when it was copied.

## CREATING A NEW CURRICULUM VERSION

You may choose to create a new curriculum version, or create a new curriculum when you need to add or delete a course or equivalent, or rearrange the order of delivery.

Consider the following when determining if curriculum versioning or creating a new curriculum is most appropriate:

- Reporting on a curriculum spans all curriculum versions. If you need to report on a curriculum version separately from the previous version or versions, create a new curriculum. The system will view the new curriculum as separate and distinct from other curriculum versions.
- Curriculum versioning does not affect assignments or exemptions.

When a curriculum is published that has two or more versions, only the published version is the active version. The active version of the curriculum is available for assignment and, if enabled, elective enrollment, but does not require existing assignments to be updated.

If it is important to allow student to choose which version to complete, or for administrators to choose which version to assign, consider creating a new curriculum instead of versioning the existing curriculum.

**Note:** Read the section below, *Un-enroll and Re-enroll Considerations*. When the **Un-enroll and Re-enroll Students from this Version of the Curriculum** check box on the *Publish* page is left cleared, students currently enrolled in the curriculum will remain enrolled in that version of the curriculum, whereas new enrollments will belong to the new (active) version.

Reports are not version-specific. This means that reports include all versions of a curriculum, active or not. If it is important to make the distinction between versions of a curriculum in reports, consider creating a new curriculum instead of a new version.

### UN-ENROLL AND RE-ENROLL CONSIDERATIONS

If you choose to version a curriculum, consider the implications of the un-enroll and re-enroll selection when the new version is published.

If you select the **Un-enroll and Re-enroll Students from this Version of the Curriculum** check box, enrolled students who have not yet completed the curriculum will be enrolled in the new curriculum version.

- The student will be re-enrolled in the curriculum. Students will maintain their progress in the curriculum and will not be required to retake courses they have already completed unless the course effective date in the curriculum is changed to a date after the original course completion.
- If the student started a course that is no longer in the new curriculum version, the course will become elective learning. The student can complete the course as an elective or un-enroll from the course.
- If the student started a course within an equivalent that is no longer in the new curriculum version, the equivalent and its associated course will become elective learning. The student can complete the equivalent course as an elective or can un-enroll from the equivalent.

Equivalents become elective when the equivalent:

- Is removed from a versioned curriculum and one of the equivalent courses has already been started.
- Is deleted from an assignment and one of the equivalent courses has already been started.
- When an assignment end date arrives and one of the equivalent courses has already been started.

If you do not select the **Un-enroll and Re-enroll Students from this Version of the Course** check box, all students who have not yet completed the curriculum:

- Will remain in the previous version.
- Will remain in any classes associated with courses in which they are registered.
- Can choose to drop a class registration, but can only reregister for classes associated with the course for the curriculum version they are currently in.

### **To create a new curriculum version:**

1. Search for the curriculum that you want to version. The *Curriculum Builder* page appears.
2. Click **Manage Curriculum Versions**. A listing of all previous curriculum versions appears.
3. Click **Create New** to the right of the curriculum version you wish to replicate. The *Curriculum Version Confirmation* page appears.
4. In the **Notes** text area, enter notes about the new curriculum version.
5. Click **Confirm**. The curriculum version is incremented by one. The new curriculum version is now in edit mode. You can now add, delete, and rearrange courses and equivalents.
6. Publish the new curriculum version. Consider the impact of your un-enroll and re-enroll selection as described above.

### **Tips**

- Before selecting un-enroll and re-enroll, you may want to run the Learning Progress report to see how many students are in progress on the curriculum and will need to restart any courses they are in progress on.

## **CHANGING CURRICULUM OWNERSHIP**

Curricula developed at the department level must be removed as a department association before the department can be deleted. To do this, you must identify department-owned curricula by running a department utilization report, specifying to include department-owned curricula.

Once a curriculum has been identified as being owned by a department you can change ownership of that curriculum to the institution level.

### **To change curriculum ownership:**

1. Log in as an administrator with institution administrator rights.
2. Search for the curriculum for which you want to change ownership. The *Curriculum Builder* page appears.
3. Click the name of the department-owned curriculum. A text box appears with the following information displayed: *This curriculum was created at the department level. To change ownership of this curriculum to reside at the institution level, click the **Ownership** link at the top of the page.*

4. Click **Ownership**. A text box appears with the following information displayed: *You have selected to change curriculum ownership from department-level to institution-level ownership. This change will be committed when you press the **Save** button. The process cannot be undone. If you wish to proceed, press the **Save** button. If you do not wish to change curriculum ownership, press the **Cancel** button.*
5. Click **Save**.

## RETIRING A CURRICULUM

Curricula can be retired. Retiring a curriculum involves manually changing the curriculum development status to *Retired* and clearing certain publish options prior to republishing the curriculum.

### To retire a curriculum:

1. Search for the curriculum for which you want to change ownership. The *Curriculum Builder* page appears.
2. Click **Publish** (even though curriculum was previously published and is live). The *Publish* page appears.
3. In the **Development Status** list, select *Retired*. **Note:** *This selection alone does not retire the curriculum. You must proceed through steps 4, 5, and 6 to retire the curriculum.*
4. Under **Quick Publish**, clear all publish options except **This curriculum can be used in Reports** and **This version is the active version of this curriculum at the selected affiliation(s)**. This will ensure that while the curriculum is retired, it can still be included in reports as needed. **Note:** *Students currently enrolled in the curriculum will remain enrolled until they either un-enroll or are un-enrolled by an administrator.*
5. Click **Quick Publish** or **Advanced Publish** if the curriculum was previously published to subsidiary affiliations and you want the curriculum to be retired for all affiliations.
6. Click **Confirm**. The curriculum is no longer available for use, except for reporting purposes.

# Document Management

## DOCUMENT MANAGEMENT

The Document Management feature enables users to upload documents to the system. Administrators can upload documents for students through the *Manage a Student* page. The maximum file size for uploaded documents is 5 MB.

## UPLOADING DOCUMENTS

### To upload a document for a student:

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Search for a student.
3. From the search results list, click the student's name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **Documents** link to open the *View Documents* page.
5. Click the **Add Document** link to open the *Add Document* page.
6. Type a name for the document in the **Name** box.
7. Add a description in the **Description** box, if needed.
8. Select a document to upload.
  - 8.1. Click the **Browse** button to open a *Choose file* dialog.
  - 8.2. Browse to the document's location on your computer.
  - 8.3. Click the document to select it.
  - 8.4. Click the **Open** button to return to the *Add Document* page.
9. Click the **Save** button to upload the document.

## UPLOADING A NEW VERSION OF AN EXISTING DOCUMENT

### To upload a new version of a document for a student:

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Search for a student.
3. From the search results list, click the student's name to open the *Manage a Student* page.

4. From the left-hand navigation pane, click the **Documents** link to open the *View Documents* page.
5. Click a document name to open the *Edit Document* page.
6. Click the remove button [  ] to remove the document.
7. When prompted to confirm the removal, click **OK**.
8. Select the new version to upload.
  - 8.1. Click the **Browse** button to open a *Choose file* dialog.
  - 8.2. Browse to the document's location on your computer.
  - 8.3. Click the document to select it.
  - 8.4. Click the **Open** button to return to the *Add Document* page.
9. Click **Save**.

## EDITING DOCUMENT INFORMATION

Although you cannot edit a document directly, you can edit its name and description in the system.

### To edit document information for a student:

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Search for a student.
3. From the search results list, click the student's name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **Documents** link to open the *View Documents* page.
5. Click a document name to open the *Edit Document* page.
6. Make any necessary edits.
7. Click **Save**.

## VIEWING AND DOWNLOADING DOCUMENTS

### To view or download a student's document:

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Search for a student.
3. From the search results list, click the student's name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **Documents** link to open the *View Documents* page.
5. Click the paper clip icon [  ] next to a document that you want to view or download.
  - If you want to view the document, click **Open** when you are prompted to open or save the file.
  - If you want to download the document, click **Save** when you are prompted to open or save the file.

## DELETING DOCUMENTS

### To delete a student's document:

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Search for a student.
3. From the search results list, click the student's name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **Documents** link to open the *View Documents* page.
5. Click a document name to open the *Edit Document* page.
6. Click the **Delete** link.
7. When prompted to confirm the deletion, click **OK**.



# Easy Instructor

## EASY INSTRUCTOR

Easy Instructor is a mobile website that enables instructors to manage their class rosters from an Apple, Android, or Windows tablet or smartphone. Instructors can

- Add students to a class.
- Drop students from a class.
- Mark students as attended or no-show.
- Move students from a waitlist to the class roster.
- Mark a class as complete.

To use the site, an instructor must be assigned the role(s) necessary to manage classroom registrations, and must be an Easy Scan administrator or an Easy Scan and Badge administrator.

## GETTING YOUR EASY INSTRUCTOR URL

Your Easy Instructor URL (Web address) is *m.healthstream.com/* followed by your organization code, which you can find in your HLC URL after *hlc/*.

For example, if your HLC URL is *www.healthstream.com/hlc/ABCD*, then ABCD is your organization code and your Easy Instructor URL is *m.healthstream.com/ABCD*.

## LOGGING ON TO EASY INSTRUCTOR

Your user id and password for Easy Instructor are the same as for the HLC.

### To log on to Easy Instructor:

1. Point your browser to the Easy Instructor URL (see [Getting Your Easy Instructor URL](#)).
2. Type your user id in the **User ID** box.
3. Type your password in the **Password** box.
4. If you want your browser to store your user ID, tap the **Remember Me** toggle button to move it to the **On** position. The next time you log on, you will not have to type your user ID again.
  - When the **Remember Me** toggle button is turned on, its background is green, and the white dot is on the right [].
  - If you turn the **Remember Me** toggle button on and later clear your browser's cookies, you will have to enter your user ID again the next time you log on.

5. Tap the **Sign In** button to log on to Easy Instructor.
  - If you have access to multiple institutions, the *Select Affiliation* page will display them. Tap an institution name to access it and open the *Schedule* page.

After you log on, the *Schedule* page displays your class schedule for the next 30 days; ungraded classes in the past also appear on the *Schedule* page. Classes marked as complete are not displayed.

## VIEWING CLASS INFORMATION

You can view information for live and virtual classes

- For which you are the instructor.
- That are not marked as *Grading Complete*.
- Are scheduled no more than 30 days in the future.

### To view information about a class:

1. From the *Schedule* page, tap a class name to open the class roster.
2. Tap the **Info** tab to view class information.

## VIEWING THE CLASS ROSTER

### To view the roster for a class:

1. From the *Schedule* page, tap a class name to open the class roster.

## MARKING STUDENTS AS ATTENDED

### To mark a student as *Attended*:

1. From the *Schedule* page, tap a class name to open the class roster.
2. From the roster, swipe from left to right over the student's name until a green **Attended** banner appears.
3. Click the **More** button at the bottom of the roster to display additional controls.
4. Click the **Save and Continue** button.

## MARKING ALL STUDENTS AS ATTENDED

You can mark all students on the class roster as *Attended* in one action. This will add any waitlisted students to the roster and mark them as *Attended* as well.

### ➔ To mark all students as *Attended*:

1. From the *Schedule* page, tap a class name to open the class roster.
2. Click the **More** button at the bottom of the roster to display additional controls.
3. Tap the **Mark all as attended** toggle button to move it to the **On** position.
  - When the **Mark all as attended** toggle button is turned on, its background is green, and the white dot is on the right [  ].
4. Click the **Save and Continue** button.

## MARKING STUDENTS AS NO-SHOW

### ➔ To mark a student as *No-Show*:

1. From the *Schedule* page, tap a class name to open the class roster.
2. From the roster, swipe from right to left over the student's name until a red **No Show** banner appears.
  - If you swipe too far to the left, the red **No Show** banner becomes a black **Drop** banner. Move your finger back to the right until the **No Show** banner reappears.
3. Click the **More** button at the bottom of the roster to display additional controls.
4. Click the **Save and Continue** button.

## CLEARING AN ATTENDED OR NO-SHOW GRADE

If you mistakenly mark a student as *Attended* or *No-Show*, you can undo the action.

### ➔ To clear an *Attended* or *No-Show* grade:

1. Touch and hold the student's name until the **Attended** or **No Show** label disappears.

## ADDING NEW STUDENTS TO THE ROSTER

If you add a student to a full class, the student will be added to the class roster and the maximum class size will be increased.

### ➔ To add a student to the class roster:

1. From the *Schedule* page, tap a class name to open the class roster.

2. Tap the **Add** tab.
3. Type the student's ID in the **User ID** box, or tap the **Search by Name** link and type the student's first and last name in the **First Name** and **Last Name** boxes, respectively.
  - You must type at least one character in both the **First Name** and **Last Name** boxes. You do not have to type the entire name.
4. Tap the **Search** button.
5. From the search results, swipe from left to right over the student's name until a green **Add to Class** banner appears.
  - Students who have a green check symbol [  ] next to their name are already registered for the class. Swiping is disabled for these students.
  - Students who have a yellow warning symbol [  ] next to their name are registered in another class for the same course. Adding them to the current class will drop them from the other class.
  - Students who have a red X symbol [  ] next to their name were registered in another class and completed it, but the course has not been satisfied because of a pending learning activity, such as a test. You cannot add these students to the current class.

## DROPPING STUDENTS FROM THE ROSTER

### To drop a student from the class roster:

1. From the *Schedule* page, tap a class name to open the class roster.
2. From the roster, swipe from right to left over the student's name until a red **No Show** banner appears. Continue moving your finger to the left until the red **No Show** banner changes to a black **Drop** banner.
3. When prompted to confirm the drop, tap **Yes**.

## MOVING STUDENTS FROM THE WAITLIST TO THE CLASS ROSTER

Waitlisted students are indicated on the roster page by a **Waitlist** label [  ]. Moving a student from the waitlist to the class roster will increase the maximum class size.

### To move a student from the waitlist to the class roster:

1. From the *Schedule* page, tap a class name to open the class roster.
2. From the roster, swipe from left to right over the student's name until a green **Force** banner appears.

## REMOVING STUDENTS FROM THE WAITLIST

Waitlisted students are indicated on the roster page by a **Waitlist** label [  ].

### ➔ To remove a student from the waitlist:

1. From the *Schedule* page, tap a class name to open the class roster.
2. From the roster, swipe from right to left over the student's name until a black **Remove** banner appears.
3. When prompted to confirm the deletion, tap **Yes**.

## MARKING CLASSES AS COMPLETE

### ➔ To mark a class as complete:

1. From the *Schedule* page, tap a class name to open the class roster.
2. Click the **More** button at the bottom of the roster to display additional controls.
3. Tap the **Mark class as complete** toggle button to move it to the **On** position.
  - When the **Mark class as complete** toggle button is turned on, its background is green, and the white dot is on the right [  ].
4. Click the **Save and Continue** button.

## RETURNING TO THE SCHEDULE PAGE

If you are accessing Easy Instructor from a tablet, you probably have a wider view of the page than from a phone.

### ➔ To return to the *Schedule* page (wide view):

1. Tap the **Schedule** link at the top left of the page.

### ➔ To return to the *Schedule* page (narrow view):

1. Tap the menu icon [  ] at the top right of the page to open the menu.
2. Tap the **Schedule** link.

## SELECTING A DIFFERENT INSTITUTION

If you are accessing Easy Instructor from a tablet, you probably have a wider view of the page than from a phone.

### ➤ To select a different institution (wide view):

1. Tap the menu icon [  ] at the top right of the page to open the menu.
2. Tap the **Select Institution** link to open the **Select Affiliation** page.
3. Tap the name of an institution to long on to it.

### ➤ To select a different institution (wide view):

1. Tap the menu icon [  ] at the top right of the page to open the menu.
2. Tap the **Select Institution** link to open the Select Affiliation page.
3. Tap the name of an institution to long on to it.

## VIEWING THE *HELP* PAGE

The *Help* page contains answers to some frequently asked questions about Easy Instructor.

If you are accessing Easy Instructor from a tablet, you probably have a wider view of the page than from a phone.

### ➤ To view the *Help* page (wide view):

1. Tap the **Help** link at the top left of the page.

### ➤ To view the *Help* page (narrow view):

1. Tap the menu icon [  ] at the top right of the page to open the menu.
2. Tap the **Help** link.

## LOGGING OFF

If you are accessing Easy Instructor from a tablet, you probably have a wider view of the page than from a phone.

### ➤ To log off from Easy Instructor (wide view):

1. Click the **Logout** link at the top right of the page.

➡ **To log off from Easy Instructor (narrow view):**

1. Tap the menu icon [  ] at the top right of the page to open the menu.
2. Tap the **Logout** link.



# Equivalents

## EQUIVALENTS OVERVIEW

An equivalent is a group of at least two courses that are equal to each other for purposes of establishing completion of an assignment. Equivalent functionality allows an administrator to create an assignment that can be completed by more than one course. Students can select which course they want to take to fulfill the assignment.

If a qualifying completion of any course within an equivalent exists on a student's transcript, it will be bridged to the equivalent and the equivalent satisfied. The system looks for the most recent completion of a course within the equivalent that fits the assignment rules. If one is found, it is bridged; otherwise, the student will select which course to fulfill the requirement.

Equivalents can be created, published, and assigned. Equivalents can also be versioned. Equivalents do not appear in the student catalog and cannot be taken as elective learning.

While continuing education (CE) credit cannot be added to an equivalent, it can be added to courses within an equivalent. When completing an equivalent for which all course options include CE credit, students will receive CE credit only for the completed course.

**Note:** *Assigned stand-alone equivalents become elective only when the equivalent:*

- *Is removed from a versioned curriculum and the student has already enrolled in the equivalent.*
- *Is deleted from an assignment and the student has already enrolled in the equivalent.*
- *When an assignment end date arrives and the student has already enrolled in the equivalent.*

## OVERVIEW OF EQUIVALENT RULES

The following rules are covered in greater detail within their corresponding Help articles. Here's an overview.

### **ASSIGNED EQUIVALENT PRE-PROCESSING**

When an equivalent is assigned, the system will check to see if there are any qualifying completions on each assigned student's transcript that can be bridged to any of the courses within the equivalent. If a qualifying course is found, the equivalent will not appear on the student's assigned learning list. If the equivalent is part of a curriculum equivalents satisfied by qualifying completions will be marked as *Completed* within the *Curriculum Details* page.

### **MATCHING COMPLETIONS TO AN EQUIVALENT**

If two or more qualifying completions exist for an equivalent, the system will bridge to the latest qualifying course completion to satisfy the equivalent.

### **EDITING COMPLETION DATES**

When a course completion or exemption is edited and it is bridged to an equivalent, the equivalent will be re-evaluated to ensure the new date still satisfies the equivalent. If the completion no longer satisfies the equivalent, the system will look for another qualifying completion to take its place. If no qualifying completion is found, the equivalent will require completion or exemption.

**Note:** *Exemptions are assignment-specific to one course.*

### **DELETING COMPLETIONS AND EXEMPTIONS**

When a course completion or exemption is deleted and it is bridged to one or more equivalents, the system will look for another qualifying completion to take its place. If no qualifying completion is found, the equivalent will require completion or exemption.

**Note:** Exemptions are assignment-specific to one course.

**Note:** It is possible for a completed equivalent to move from the transcript back to the assigned learning list as a result of a completion being deleted or decoupled.

### **SAMPLE EQUIVALENT**

The following is an example of how an equivalent might be added in the system:

#### **Assignment: Diabetes Care**

Equivalent added to the assignment includes:

- Diabetes Care Online Course
- Diabetes Care Classroom Course

The student chooses one of the two course options. He may choose to complete the Diabetes Care Online Course, in which case he is not required to complete the classroom course, or vice-versa. The student may also begin one course within the equivalent and decide to un-enroll in that course and enroll in the other course instead. Successful completion of either course fulfills the assignment. Students will see the completed course and associated certificate their transcript. The equivalent itself will not appear on the transcript.

Assignments that include equivalents can also include separate, single courses, and curricula. This gives administrators maximum flexibility for designing education, while incorporating choice for the learners where appropriate.

*Note: The effective date of an assignment containing an equivalent applies to all courses within the equivalent as well as to the equivalent itself. If a student has completed a course within the equivalent subsequent to the assignment effective date, the student will automatically be given credit for equivalent completion when the assignment is created. An equivalent can, however, be assigned a relative effective date when the equivalent is a learning item within a curriculum. If the student self-enrolls in the curriculum (from the student Catalog tab) then the relative effective date will apply to the equivalent and the courses within the equivalent.*

**Note:** Enrollment occurs when a student clicks on the **Enroll** button for an equivalent within the curriculum. If a student is already enrolled in an equivalent in the curriculum (and, if applicable, any preceding courses have either been completed or exempted), that enrollment is bridged to the curriculum allowing the student to satisfy the requirement with a single completion.

## **ADDING AN EQUIVALENT**

Adding an equivalent contains two steps: creating the equivalent and adding courses to the equivalent.

### **CREATING THE EQUIVALENT**

1. On the **Courses** tab, click **Add an Equivalent**. The *Equivalent Properties* page appears.
2. In the **Equivalent Name** box, enter the equivalent name.
3. In the **Description** box, enter a description of the equivalent.
4. Click **Select Categories** to select the default categories for the equivalent. Available categories are the same as those used for courses.

5. Check the category check boxes to the left of the category or categories you wish to associate with the equivalent. Subcategories may be revealed by clicking the + sign to the left of category names.
6. Click **Select**. The system returns you to the **Add an Equivalent** page with the categories you selected in the **Default Categories** box.
7. In the **Development Status** list, select the development status. Available statuses are the same as those used for courses.
8. Do one of the following:
  - Click **Save**. The *Equivalent Builder* page appears.
  - Click **Save and Add Another** if you wish to add an additional equivalent. A new *Equivalent Properties* page appears.
9. You will need to come back and add courses to the equivalent before you can publish it or assign it. The **Save and Add Another** button is provided so administrators can choose how they want to work; either create the names and properties for several equivalents at one time, or build an equivalent from start to finish, including adding courses.

**Note:** To return to the original equivalent, you must return to the **Courses** tab and click **Manage Equivalents**.

From the *Equivalents Builder* page, you can now add courses to the equivalent.

### **ADDING COURSES TO THE EQUIVALENT**

1. Search for the equivalent to which you want to add the course. The *Equivalent Builder* page appears.
2. Click **Add Courses**. The *Course Search* page appears.
3. Perform a course search. Search by title, keyword, alphabetically or by category. A list of all courses matching your search criteria appears.
4. Select the check box to the left of the desired course name or click **Check All Current Search Results** to select all of the courses.
5. To add more courses, continue to search for courses, even if the courses are found on separate pages. There is no need to repeat the search process.
6. Click **Select**. The courses you selected appear in the left hand navigation tree on the *Equivalent Builder* page.
7. Click the name of each course from the left-hand navigation pane to view the course properties. The *Course Properties* page appears, which includes the course description and learning objectives. **Note:** The course may be deleted from the equivalent by clicking **Delete** in the lower left-hand corner of the *Course Properties* page.
8. Click **Preview Course** to view course details, including learning activities and continuing education (CE) credit, if applicable.

9. Drag the courses to the desired positions in the left-hand navigation pane.
10. Prior to publishing the equivalent, the equivalent properties can be edited and courses can be added or deleted.

**Note:** *Equivalents are assignable only (or they can be included as part of a curriculum which can be assigned or electively enrolled). Equivalents must be published to be used in assignments.*

★ **Tips**

- Consider creating a special category and sub-categories for equivalents.

## **PUBLISHING AN EQUIVALENT**

Publishing makes the equivalent available for assignment.

**Note:** *Once an equivalent is published, you cannot add, delete or rearrange the courses within the equivalent.*

➔ **To publish an equivalent:**

1. Search for the equivalent that you want to publish. The *Equivalent Builder* page appears.
2. Click **Publish**. The *Publish* page appears.
3. In the **Development Status** list, select the development status of the equivalent.
4. You can now choose between **Quick Publish** or **Advanced Publish**. **Quick Publish** allows the equivalent to be published to the entire institution using a common set of publishing properties. **Advanced Publish** allows publishing properties to be customized for specific subsidiary affiliations.

### **PUBLISHING THE EQUIVALENT WITH QUICK PUBLISH**

If you wish to publish the equivalent to the entire institution using a common set of publishing properties, use the **Quick Publish** feature.

Make the desired selections under **Quick Publish**.

1. Leave the **This equivalent can be used by subsidiary affiliations** check box selected if you want the equivalent to be available for use by administrators in subsidiary affiliations with access to equivalent building or assignments features.
2. Leave the **This equivalent can be used for enrollment (assignment and/or class registration)** check box selected if you want the equivalent to be available for administrator delivery to students via group or individual assignment or by class registration.
3. Leave the **This equivalent can be used in Reports** check box selected if you want the equivalent available for inclusion in reports.
4. Leave the **This version is the active version of this equivalent at the selected affiliation(s)** check box selected if you want the equivalent to be active in the system.

5. Select the **Un-enroll and re-enroll students that are currently enrolled but have not completed any version of this equivalent** check box if you want the system to un-enroll and re-enroll students when publishing subsequent equivalent versions.
6. Click **Quick Publish**. A warning page appears.
7. Click **Confirm**. An equivalent publish request is submitted.
8. To view the status of your publish request, click **Go to Request Manager**.

### **PUBLISHING THE EQUIVALENT WITH ADVANCED PUBLISH**

If you wish to publish an equivalent to specific subsidiary affiliations only, or if you wish to customize the publish settings for subsidiary affiliations, you can use the Advanced Publish feature.

1. Click **Advanced Publish**. A warning page appears.
2. Click **Add Affiliations to Receive Equivalent**. The *Find affiliation(s)* page appears.
3. Search your organizational hierarchy for the desired subsidiary affiliation(s) using alphabetical, word search, or hierarchy search.
4. Click **Search**. The search results appear in the search results box.
5. In the search results box, select the check box(es) next to the name(s) of the subsidiary affiliation(s) to which you wish to publish.
6. Click **Select**. The selected affiliations will appear in the hierarchy tree on the left.
7. Click the name of each affiliation. The standard publishing settings appear (see Quick Publish). Select the desired settings for the affiliation.
8. Click **Save Settings**. A warning page appears, as shown below. If more than one affiliation has been selected, repeat steps 6 and 7 for each affiliation.
9. Click **Continue**. An equivalent publish request will be submitted.
10. To view the status of your publish request, click **Go to Request Manager**.

### **REPUBLISHING AN EQUIVALENT**

If edits are made to a published equivalent, the equivalent must be republished to activate changes.

#### **To republish an equivalent:**

1. Search for the equivalent that you want to republish. The *Equivalent Builder* page appears.
2. Make desired edits to the equivalent.

3. Click **Publish**. The *Publish* page appears.
4. Click **Republish**. A warning page appears.
5. Click **Continue**. If you choose, you can use the Quick Publish or Advanced Publish options to change the publish settings for the equivalent.

**Note:** By default, the **Un-Enroll and Re-enroll Students that are currently enrolled but have not completed any version of this equivalent** check box is not selected. Because republishing is required only when edits are made to the equivalent properties and there will be no impact on the students' enrollment status or course selection, leave this box cleared. Selecting this box will not affect student enrollment in a previously-selected course within the equivalent.

## SEARCHING FOR AN EQUIVALENT

### To search for an equivalent:

1. On the **Courses** tab, click **Manage Equivalents**. The *Browse for an Equivalent* page appears.
2. Conduct an equivalent search. Search alphabetically, by category, whole word or partial word + wildcard. You can also narrow your search by selecting a development status and selecting the corresponding check boxes. By default, equivalents marked *Retired* are filtered out of your search criteria, however, you can select to include retired equivalents by selecting the check box. You may also choose only retired equivalents by clearing all other development status check boxes. **Note:** You can also select the **Include All Versions** check box to search for all versions (not just the currently active version) of the equivalent.
3. Click **Search**. The system will return a listing of all equivalents that match your search criteria.
4. Click the name of the desired equivalent. The *Curriculum Builder* page appears.

## EDITING AN EQUIVALENT

Equivalents can be edited as needed. You can edit an equivalent at any time as long as the equivalent has not been published. If the equivalent has been published, it must be republished after edits are made to activate the changes.

Equivalents always use the active version of a course. If a course is updated and republished, all equivalents containing the course will use the new active version. The un-enroll and re-enroll options selected for a course republish will apply to the course as part of an equivalent as well.

### To edit an equivalent:

1. Search for the equivalent that you want to edit. The *Equivalent Builder* page appears.
2. Make desired edits to the equivalent.
3. Click **Save**. If the equivalent was previously published, it must be republished to activate changes.

**Note:** You cannot add, delete or rearrange courses within an equivalent that has already been published. To add, delete or rearrange courses, you must create a new equivalent version.

## COPYING AN EQUIVALENT

You may choose to copy an equivalent when you need to create a new equivalent quickly using components of an existing published equivalent.

A copied equivalent exists as a new, independent equivalent. The equivalent from which the copy was made remains unchanged in the system; it simply acts as a template for the new equivalent. Once the copy is made, the two equivalents are completely distinct in the system, with no relationship between them.

### COPYING AN EQUIVALENT VS. CREATING A NEW EQUIVALENT VERSION

Copying an equivalent is a shortcut for adding a new equivalent. The feature is designed to let you use an existing equivalent as a time-saving template. When an equivalent is copied, the courses in the original equivalent are also mapped to the new equivalent. The courses themselves are not copied (changes to any course would be reflected in both equivalents).

Since the copied equivalent is not related to the original, the copy will not substitute for the original in assignments, exemptions, or reports. If you need to make changes to an existing equivalent and wish to keep assignments, exemptions, and reporting unchanged, you should consider creating a new equivalent version instead.

#### To copy an equivalent:

1. Search for the published equivalent that you want to copy. The *Equivalent Builder* page appears.
2. Click **Copy Equivalent**. A confirmation prompt appears. **Note:** After you click **OK** to confirm, the new equivalent will be created in your system. Click **OK** only if you are certain you wish to create a copy of this equivalent.
3. Click **OK**.
4. The *Equivalent Properties* page for the new equivalent will be displayed in *Equivalent Builder*. The name of the new equivalent will be the original equivalent name with the word *COPY* appended to the end.
5. Change the equivalent name as needed.
6. Modify the new equivalent properties as needed and publish when ready.
7. **Note:** The development status of the new equivalent is automatically set to *In Development*. The equivalent version is set to one, regardless of what the original equivalent's version was when it was copied.

## CREATING A NEW EQUIVALENT VERSION

You may choose to create a new equivalent version, or create a new equivalent when you need to add or delete courses.

Consider the following when determining if equivalent versioning or creating a new equivalent is most appropriate:

- Reporting on an equivalent spans all equivalent versions. If you need to report on an equivalent version separately from the previous version or versions, create a new equivalent. The system will view the new equivalent as separate and distinct from other equivalent versions.
- Equivalent versioning does not affect assignments or exemptions.

When an equivalent is published that has two or more versions, only the published version is the active version. The active version of the equivalent is available for assignment and, if enabled, elective enrollment, but does not require existing assignments to be updated.

If it is important to allow student to choose which version to complete, or for administrators to choose which version to assign, consider creating a new equivalent instead of versioning the existing equivalent.

*Note: Read the section below, Un-enroll and Re-enroll Considerations. When the **Un-enroll and Re-enroll Students from this Version of the Equivalent** check box on the Publish page is left cleared, students currently enrolled in the equivalent will remain enrolled in that version of the equivalent, whereas new enrollments will belong to the new (active) version.*

Reports are not version-specific. This means that reports include all versions of an equivalent, active or not. If it is important to make the distinction between versions of an equivalent in reports, consider creating a new equivalent instead of a new version.

### **UN-ENROLL AND RE-ENROLL CONSIDERATIONS**

If you choose to version an equivalent, consider the implications of the un-enroll and re-enroll selection when the new version is published.

If you select the **Un-enroll and Re-enroll Students from this Version of the Equivalent** check box, enrolled students who have not yet completed the equivalent:

- Are un-enrolled and re-enrolled into the new equivalent version.
- Can continue their progress in a course that is still included in the equivalent.
- Will see started courses that are no longer part of the equivalent moved to the **Elective Learning** section of the *My Learning page*, where they can be completed or the students can un-enroll.

If you do not select the **Un-enroll and Re-enroll Students from this Version of the Equivalent** check box, all students who have not yet completed the equivalent:

- Will remain in the previous version.
- Will remain in any classes in which they are registered.
- Can choose to drop a class registration, but can only reregister for classes associated with the courses for the equivalent version they are currently in.

#### **To create a new equivalent version:**

1. Search for the equivalent that you want to version. The *Equivalent Builder* page appears.
2. Click **Manage Equivalent** Versions. A listing of all previous equivalent versions appears.
3. Click **Create New** to the right of the equivalent version you wish to replicate. The *Equivalent Version Confirmation* page appears.
4. In the **Notes** text area, enter notes about the new equivalent version.

5. Click **Confirm**. The new equivalent version is now in edit mode. You can now add, delete, and rearrange courses.
6. Publish the new equivalent version. Consider the impact of your un-enroll and re-enroll selection as described above.

## CHANGING EQUIVALENT OWNERSHIP

Equivalents developed at the department level must be removed as a department association before the department can be deleted. To do this, you must identify department-owned equivalents by running a Department Utilization report, specifying to include department-owned equivalents.

Once an equivalent has been identified as being owned by a department you can change ownership of that equivalent to the institution level.

### To change equivalent ownership:

1. Log in as an administrator with institution administrator rights.
2. Search for the equivalent for which you want to change ownership. The *Equivalent Builder* page appears.
3. Click the name of the department-owned equivalent. The following message appears: *This equivalent was created at the department level. To change ownership of this equivalent to reside at the institution level, click the **Ownership** link at the top of the screen.*
4. Click **Ownership**. The following message appears: *You have selected to change equivalent ownership from department-level to institution-level. This change will be committed when you press the **Save** button. The process cannot be undone. If you wish to proceed, press the **Save** button. If you do not wish to change equivalent ownership, press the **Cancel** button.*
5. Click **Save**.

## RETIRING AN EQUIVALENT

Equivalents may be retired. Retiring an equivalent involves manually changing the equivalent development status to *Retired* and clearing certain publish options prior to republishing the equivalent.

### To retire an equivalent:

1. Search for the equivalent for which you want to change ownership. The *Equivalent Builder* page appears.
2. Click **Publish** (even though the equivalent was previously published and is live). The *Publish* page appears.
3. In the **Development Status** list, select **Retired**. **Note:** *This selection alone does not retire the equivalent. You must proceed through steps 4, 5, and 6 to retire the equivalent.*
4. Under **Quick Publish**, clear all publish options except **This equivalent can be used in Reports** and **This version is the active version of this equivalent at the selected affiliation(s)**. This will ensure that

while the equivalent is retired, it can still be included in reports as needed. **Note:** *Students currently enrolled in the equivalent will remain enrolled until they either un-enroll or are un-enrolled by an administrator.*

5. Click **Quick Publish** or **Advanced Publish** if the equivalent was previously published to subsidiary affiliations and you want the equivalent to be retired for all affiliations.
6. Click **Confirm**. The equivalent is no longer available for use, except for reporting purposes.

# HealthStream Authoring Center

## AUTHORING CENTER POLICIES AND GUIDELINES

To ensure high performance standards for clients, HealthStream has adopted the following policies for our Authoring Center platform to:

1. Protect all clients from loading files that could threaten the integrity of the Authoring Center.
2. Ensure the highest performance possible for our clients' authoring experience.
3. Prevent unauthorized use of the site, such as posting protected intellectual property without the owner's permission, use of the FTP site as non-authoring asset file storage, or use of files that are, in general, not being used in authored courses.

These policies will protect your organization's investment in authored courses and provide for the best possible end-user experience.

### **AUTHORING POLICIES**

1. No single file uploaded to the HealthStream Authoring Servers may be larger than 25 megabytes (in the case of SCORM .zip files uploaded from the Course Builder page, the limit is 100 MB). Also, no course page can contain assets that total more than 25 megabytes. The total disk space required by the entire course may be larger than 25 megabytes, but no single file or page can be. The reason for this limitation is to ensure that course pages load in a timely manner and to ensure an optimal end user experience. For more information, see our recommended practices on breaking up large files into smaller ones that comply with the policies and improve the user experience.
2. All files uploaded to the authoring servers (your Authoring Directory) must included be on the approved file types list. This policy exists to protect all users from the potential damage caused by malicious or carelessly constructed content. HealthStream amends the list of allowable file types from time to time and will communicate any additions or deletions from the list by updating a copy of these Authoring Policies found in the online help. Please see Allowable File Types for Authored Content below for the current list of allowable files.
3. Only load content into Authoring Center for which your organization has a legal copyright or permissions from the copyright owner to distribute within the organization. Uploading files that are not owned by your organization, or where your organization does not have permission from the copyright owner, is a violation of copyright laws and may trigger legal action against your organization. HealthStream maintains the right to deny customer access to our Authoring Center infrastructure to distribute material where the customer is not the copyright owner or does not have permission from the copyright owner, but exercises this right only on rare occasions to protect our previously existing business interests.
4. Only assets that will be used in authored courses may be uploaded to the authoring servers. Do not use the Authoring Center for general file storage or for other unauthorized purposes.

5. Any assets loaded to the authoring servers that are or may be out of compliance with the policies detailed above may be deleted at the sole discretion of HealthStream.
6. Courses that invoke communication features (such as e-mail or FTP) must use standard HTTP/HTTPS and FTP/SFTP ports, and must require no server-side technologies such as SMTP, ASP, Cold Fusion, etc.
7. Clients are responsible for keeping back-up copies of all assets published to the Authoring Center. In the event that HealthStream deletes a needed file for a policy violation, restoring this file is the responsibility of the client. Authoring servers should not be used for content delivery and should NOT be the only servers where your files exist.
8. No executable file types, such as .exe, are allowed on HealthStream authoring server or to be called from the Authoring server to another external server where the .exe resides.
9. Uploading or large video files such as DVDs to the Authoring server is not permitted.

#### **ALLOWABLE FILE TYPES FOR AUTHORED CONTENT**

HealthStream reserves the right to delete files that are not of these types for the protection of all authoring clients. Please contact Customer Support if you have any questions about these allowable file types.

- .au, audio/basic
- .css, text/css
- .doc
- .docm
- .docx
- .dotm, application/vnd.msword
- .dotx
- .f4v, video/mp4
- .flv, video/x-flv
- .gif, image/gif
- .htm, text/html
- .html, text/html
- .jar, application/java-archive
- .jpe, image/jpeg
- .jpeg, image/jpeg

- .jpg, image/jpeg
- .js, application/x-javascript
- .mov, Quicktime movie
- .mp2, video/mpeg
- .mp3, audio/mpeg
- .mpa, video/mpeg
- .mpv2, video/mpeg
- .pdf, application/pdf
- .png, image/png
- .potm - PowerPoint 2007 macro-enabled XML template
- .potx - PowerPoint 2007 XML template
- .ppam - PowerPoint 2007 macro-enabled XML add-in
- .ppsm - PowerPoint 2007 macro-enabled XML show
- .ppsx - PowerPoint 2007 XML show
- .ppt, .pptx, application/vnd.ms-powerpoint
- .pptm - PowerPoint 2007 macro-enabled XML presentation
- .pptx - PowerPoint 2007 XML presentation
- .swf, application/x-shockwave-flash
- .txt, text/plain
- .vsd, .vss, application/visio
- .xhtml, text/html
- .xlam - Excel 2007 XML macro-enabled add-in
- .xls, .xlsx, application/vnd.ms-excel
- .xlsb - Excel 2007 binary workbook (BIFF12)
- .xlsm - Excel 2007 XML macro-enabled workbook
- .xlsx - Excel 2007 XML-enabled sheet

- .xltn - Excel 2007 XML macro-enabled template
- .ltx - Excel 2007 XML template
- .xml, text/html
- .xsd, text/html
- .zip, application/zip (only when transporting SCORM package)

## **AUTHORING CENTER FAQs**

### ***HOW CAN I DEVELOP CONTENT FOR USE IN THE AUTHORING CENTER?***

You can develop content in any of the ways outlined below:

- Develop HTML content through the the HLC using the Content Manager and HTML Editor.
- Develop HTML content via any HTML authoring tool (e.g., Adobe Contribute, Adobe Dreamweaver, CoffeeCup, SeaMonkey, etc.)
- Develop SCORM content via any SCORM development tool.

### ***HOW CAN I UPLOAD FILES FOR USE IN MY COURSES?***

Files must first be placed in your Authoring Directory. Your Authoring Directory is a secure location that houses all your authored content. When you create an authored learning activity, you select content from your Authoring Directory to include in the course. To place files on your Authoring Directory, you can:

- Create HTML files directly from the the HLC using the Content Manager and HTML Editor. See Adding a Page for more information.
- Using the Content Manager, upload files developed in a third-party HTML authoring tool. See Uploading Files for more information.
- Upload files using a third-party FTP client. See Connecting a Third-Party Tool to the Authoring Directory for more information.

### ***I CURRENTLY USE CONTRIBUTE (OR ANOTHER THIRD-PARTY HTML AUTHORING TOOL) TO AUTHOR AND UPLOAD CONTENT.. CAN I CONTINUE TO DO SO?***

Yes. The new Authoring Center features are built on the existing platform, which means you can continue to use your current tools and processes without interruption, if you wish. While you may find that the new Content Manager and HTML Editor make it easier to create and manage content within the HLC, you can use any third-party tool to author HTML content and upload it.

### ***WHAT IS THE HTML EDITOR?***

The HTML Editor is an HTML authoring tool integrated directly into the the HLC. This tool allows you to create authored content without the need for any third-party tool. Using the HTML Editor, you can add text, images, tables, audio, and video to a page and format the content as needed. See the HTML Editor Overview for more information.

### ***WHAT IS THE CONTENT MANAGER AND WHY SHOULD I USE IT?***

The Content Manager allows you to manage and organize the contents of your organization's Authoring Directory from within the HLC. You can use the Content Manager to create folders, copy, paste, delete, or rename files.

The use of the Content Manager is not necessary; if you prefer, you can organize and manage your authored content using a third-party FTP client. However, you may find that the Content Manager allows you to easily view and manage the contents of your Authoring Directory, without having to use a separate tool. See the Content Manager Overview for more information.

### **WHO CAN ACCESS THE CONTENT MANAGER AND HTML EDITOR?**

Access to the Content Manager and HTML Editor are granted to any administrator with the new "HTML Editor" feature. To have this feature added to your administrator role, contact your the HLC Customer Support service.

### **WHAT IS THE COURSEWARE EXCHANGE?**

The Courseware Exchange allows you to share courses with other organizations. You can copy customer-shared assets directly into Course Builder for use in authoring your own course.

When publishing authored courses, you can determine when you'd like to share to the Courseware Exchange.

### **HOW DO I ADD COURSES TO THE AUTHORIZING CENTER COURSEWARE EXCHANGE?**

See [Publishing to the Courseware Exchange](#)

## **CONTENT MANAGER**

### **CONTENT MANAGER OVERVIEW**

The Content Manager allows you to manage and organize the contents of your organization's Authoring Directory from within the HLC. You will create folders in your Authoring Center to organize your authored content. By default, your top-level folder is named **Content**. This folder cannot be renamed. You can add folders and sub-folders within the **Content** folder.

Your Authoring Directory can also be managed through an FTP client. The Content Manager will reflect any changes made outside the HLC. See [Connecting an HTML Authoring Tool to the Authoring Directory](#) for more information.

You can organize your Authoring Directory file structure as needed, as long as you follow these guidelines:

- For any single piece of content, all assets must be included within a single content folder. When creating an authored learning activity, you will select a folder that includes all assets - HTML pages, images, and media files - used in that activity.
- Your specified folder does not have to be a top-level folder, but all assets must be within it.
- The selected folder can include sub-folders to organize content, but the HTML files must be organized at the root of that folder.
- Files cannot be placed in the top level "/content" folder. They must be contained within a folder that is located within the top level "/content" folder.

The Content Manager is laid out in a double-pane view similar to the view used in Windows Explorer. The left pane of the content manager displays only folders and sub-folders. To see the contents of any folder, select in within the left pane and all contents of that folder will display in the right pane.

### **STANDARD AND BASIC CONTENT MANAGER**

If you have 100 or more sub-folders in your Content folder, the HealthStream Learning Center uses the *Basic Content Manager* to display the files and folders in the **Content** folder. The Basic Content Manager optimizes system performance for large numbers of content sub-folders. Links on the page enable you to switch between the Basic and Standard Content Managers.

If you have 100 or more sub-folders in your **Content** folder, it is recommended that you create authored learning activities from the *Course Builder* page when you create a course, rather than creating the authored learning activity first and then adding it to a course.

### **ACCESSING THE CONTENT MANAGER**

There are three ways to access Content Manager:

- Click **Manage Authored Content** from the Courses tab. This allows you to manage all files without accessing the Content Manager via the Course Builder.
- When adding or editing a course, add an Authoring Center Activity, select the Common Properties, and click **Save**. See Adding an Authored Learning Activity for more information.
- When managing an existing course that includes an Authoring Center Activity, click the Authoring Center Activity name from the *Course Builder* page.

### **REFRESHING THE CONTENT MANAGER**

Changes to the Content Manager may take a moment to display correctly as the HLC communicates with your Authoring Directory. If the Content Manager does not reflect changes correctly after copying files, making edits to pages, or renaming files, click the **Refresh** button to force the Content Manager to update.

### **RIGHT-CLICK WITHIN CONTENT MANAGER**

By clicking the right button on your mouse within Content Manager, you can access a contextual menu that includes options from the main tool bar and some additional options, including:

- **Rename:** Rename a file, folder, or page. See Renaming Files, Folders, and Pages for more information.
- **Copy:** Copy a folder or file. The copied files are duplicated, and are not moved from their original location. See Copying Files, Folders, and Pages for more information.
- **Paste:** Paste a copied folder or file to a new location.
- **Download Folder/File:** Download the folder or file to your local computer. See Downloading Files, Folders, and Pages for more information.

## **NAMING PAGES**

When displaying your content, the system orders the pages according to the naming convention you give them. It is important that you use the following guidelines to name your pages.

- Name the page using the page title or another unique name.
- Begin filenames with a numeric value and an underscore in increments of 10. The number before a page name indicates its order in your course. Beginning with an increment of 10 allows you to insert pages between your pages later. Example: 010\_Introduction.
- Do not include numbers after the underscore.

- Do not include spaces in the file name. Separate words with an underscore or capital letters. Example: 030\_Emergency\_Procedures OR 030\_EmergencyProcedures.
- Do not use these special characters: ~, !, @, #, \$, %, ^, &, \*,(, ), +, =, `, ', ;, :, /, \, <,and >. Example: <introduction> is not a valid file name.

## ADDING A FOLDER

You will create folders in your Authoring Center to organize your authored content. By default, your top-level folder is named **Content**. This folder cannot be renamed. You can add folders and sub-folders within the **Content** folder.

### To add a folder

1. Access the Content Manager.
2. In the Content Manager, choose the parent folder to which you will add your new folder. You may choose to place your new folder at the top level by selecting the Content folder. Note that selecting a folder in the right pane takes precedence over any folder selection in the left pane.
3. Click the New Folder button in the Content Manager menu. A window will open.
4. Enter a name for the new folder.
5. Click **OK**. The new folder is added to the parent folder.

## ADDING A PAGE

### To add a page

1. Access the Content Manager.
2. In the Content Manager, select the folder to which you wish to add a page. Note that selecting a folder in the right pane take precedence over any folder selection in the left pane.
3. Click the **Add New Page** button to open the HTML Editor window.
4. Use the HTML Editor to edit the content as necessary. Note that your changes are unsaved until you complete the following steps.
5. When you'd like to save your new page, click **Save**. The *Save* window opens.
6. Enter a new file name.

7. Click **Save**. You are returned to the HTML Editor. The filename now appears in the top left of the window, indicating that the page has been saved.
8. Click **Save and Close** or **Exit** to return to the Content Manager.

All pages created in the HTML Editor are automatically sized at 1024 x 768 pixels.

### ★ Tips

If not all buttons are visible in the HTML Editor, press F11 on your keyboard to toggle full screen mode. (Press F11 again to return to normal screen mode to access the Save and Exit buttons.)

## COPYING FILES, FOLDERS, AND PAGES

Pages, files, and folders in the Authoring Directory can be copied via the Content Manager.

### 🔄 To copy files, folders, or pages

1. Access the Content Manager.
2. In the Content Manager, right-click the file, folder, or page you'd like to copy and select **Copy** from the menu.
3. Navigate to the desired location for the file within Content Manager.
4. Right-click within the new location and select Paste from the menu. The file, folder, or page will be copied into the location with *-Copy* appended to the filename. When copying folders, all the contents of that folder are copied as well.

## RENAMING FILES, FOLDERS, AND PAGES

Pages, files, and folders in the Authoring Directory can be renamed via the Content Manager. Renaming files can change the behavior of your content and cause it to not properly display or function. Rename files cautiously. Consider the following before renaming any items:

- The Authoring Center orders your content's pages according to the naming convention you give them. Be careful to follow the naming conventions covered under [Naming Pages](#) and be aware that changing the numeric value of your page names may change their display order.
- Changing image, video, or audio file names will alter any references within your pages and cause the image to no longer display. If you change the name of an image that is used in a page, you may need to edit that page again to refer to the newly renamed file.
- Do not rename your "images" sub-folder. Images in your content must be placed within a sub-folder titled "images."
- Always preview your content and test it thoroughly before publishing a course.

### 🔄 To rename files, folders, or pages

1. Access the Content Manager.
2. In the Content Manager, right-click the file, folder, or page you wish to rename and select **Rename** from the menu. The *Rename* window opens.

3. Enter a new name for the item.
4. Click **OK**. The item is renamed.

## DELETING FILES, FOLDERS, AND PAGES

### TO DELETE FILES, FOLDERS, OR PAGES

1. Access the Content Manager.
2. Select a file, folder, or page in the left or right pane of the Content Manager. Note that your selection in the right pane takes precedence over any selection in the left pane.
3. Click the **Delete** button. A window appears and asks you to confirm that you wish to delete the selected item. Deleting a folder deletes all the contents of that folder. Any page that uses the items included will not display properly after it is deleted.
4. Click **OK**. The item is deleted.

## EDITING A PAGE

### TO EDIT A PAGE

1. Access the Content Manager.
2. In the Content Manager, double-click the page you wish to edit. The HTML Editor window opens. You can also right-click within the page and select **Open**, or select the page and click the **Open** button from the toolbar.
3. Use the HTML Editor to edit the content as necessary. Note that your changes are unsaved until you complete the following steps. See HTML Editor Overview for more information.
4. When you'd like to save your edits, click **Save**. The success message confirms your page has been saved. Click **Save and Close** to save your changes and return to the Content Manager.

When opening an HTML file for editing, the following error message may occasionally appear: **An error occurred while opening the file, please try again**. Attempt to open the file again. The error may be caused due to high traffic on the server.

### TO DISCARD YOUR CHANGES

1. From the HTML Editor, click **Exit**. A confirmation window will appear.
2. Click **OK**. Your unsaved changes are discarded and you return to the Content Manager.

### TO SAVE YOUR EDITS AS A NEW PAGE

If you wish, you may edit a page and save the edited version as a new page under a different filename. You can use this technique to more efficiently create new pages using pre-existing pages as a template.

1. In the Content Manager, double-click the page you wish to edit. The HTML Editor window opens.
2. Click **Save As....** The Save window opens.
3. Enter a new file name. Your file name should adhere to page naming guidelines covered in Naming Pages.
4. Click **Save**. You are returned to the HTML Editor. The new filename now appears in the top left of the editor window, indicating that the page has been saved as a new page.
5. Edit the content of your page as necessary. Note that your changes are unsaved until you click **Save** or **Save and Close**.

## UPLOADING FILES

You can upload files to your Authoring Directory via the Content Manager for use in your authored content. Multiple files can be uploaded at once. You may also upload a .zip file including multiple files and folders. The Content Manager will automatically unzip the file.

### To upload files

1. Access the Content Manager.
2. In the Content Manager, choose the parent folder to which you will add your file(s). Note that selecting a folder in the right pane takes precedence over any folder selection in the left pane.
3. Click the **Upload** button to open the Upload window. You can also right-click within the Content Manager and select **Upload** from the menu.
4. By default, the Upload window provides three rows to use in selecting files for upload. Click the **Select** button next to any row and the file browser opens.
5. Select the file you wish to upload from your computer.
6. Click **Open**. You are returned to the Upload window, where the selected filename appears in the row.
7. Repeat steps 4 through 6 as needed to add additional files to the upload.
8. Check the **Overwrite if file exists?** check box if you wish to overwrite any files within the selected folder that have an identical filename. Be cautious when overwriting files; when a file is overwritten, any page that uses that item will display the new file. This may change the behavior of your authored content.
9. Click **Upload**. You are returned to the Content Manager and the files selected for upload will appear in the selected folder. If your uploaded files do not appear in the selected folder, click the **Refresh** button to refresh the Content Manager view.

## UPLOADING IMAGES

For images to display correctly in the content, you must follow these rules when uploading images to the Authoring Directory:

- Images and other media must be placed within a folder titled *images*.
- Do not include any additional characters in the *images* folder name.
- The *images* folder must be a sub-folder within the folder that contains the page in which they will appear.

#### ★ Tips

- All files uploaded to the Authoring Directory are subject to Authoring Center Policies and Guidelines, which includes policies regarding allowed file types and sizes. Attempted uploads that do not meet the stated policies and guidelines may fail. See Authoring Center Policies and Guidelines for more information.
- In the *Upload* window, you can click the Add button to add additional rows and upload additional files.
- In the *Upload* window, click **Remove** next to any row to remove that file from the upload.

## UPLOADING A COMPLETE AUTHORED ACTIVITY

When uploading .zip files, the Content Manager will automatically unzip the file and place the individual files in the selected folder. You can use this feature to easily upload large numbers of files at once, or to upload a complete authored activity developed in a third-party HTML authoring tool.

When uploading a complete authored activity as a .zip file, be sure that you follow these guidelines:

- Before uploading, create a new folder in the Content Manager to house the content. You will place all assets within that folder. See *Adding a Folder* for more information.
- Be sure that the HTML pages in your content folder match the naming convention necessary for the Authoring Center. See *Adding a Page* for more information.
- Your .zip file should contain all necessary files and sub-folder; for example, all images should be contained within a sub-folder titled "images." See *Adding a Folder* or more information.

## DOWNLOADING FILES, FOLDERS, AND PAGES

You can also download files from your Authoring Directory via the Content Manager. This feature allows you to save a local copy of any file, folder, or page.

1. Access the Content Manager.
2. In the Content Manager, right-click the file, folder, or page you wish to download and select **Download [File, Folder]** from the menu. The browser dialogue box opens.
3. In the browser dialog box, click **Save** and choose a location on your local computer to save the file. The file is downloaded to the selected location. This process may vary depending on browser and browser version.

#### ★ Tips

- You can use the download feature to download authored content and archive it locally. Download the folder using the process above - this will pull all course pages and assets into a single folder, which you can store on your local computer or network. It is recommended that you keep a local copy of all authored content in case you need to revert to an original version.

## CONNECTING A THIRD-PARTY TOOL TO THE AUTHORIZING DIRECTORY

While the Content Manager and HTML Editor allow you create and manage authored activity asset, the use of these tools is not strictly necessary. You may use any third-party HTML authoring tool to create content and then upload that content to the Authoring Directory, provided those assets meet Authoring Center Policies and Guidelines. You can also manage your Authoring Directory via an FTP connection with an FTP client.

### **ABOUT THE FTP CONNECTION**

FTP (File Transfer Protocol) is a standard used to securely transfer files over the Internet. Your Authoring Directory can be accessed via an FTP connection. If you wish to use a third-party authoring tool to develop HTML content, you will need to establish an FTP connection between that tool and the Authoring Directory. Some HTML authoring tools have built-in FTP capabilities. Others may not, therefore requiring you to set up an FTP connection with a separate FTP client. In either case, you will need your Authoring Directory's FTP account information to make the new connection.

To connect an FTP client to an FTP site, you must have the following information:

- An FTP address. This is the unique address of the designated FTP site. In this case, the FTP address is the unique address of your Authoring Directory.
- The user ID specified for that address.
- The password specified for that address.

The use of a third-party FTP client is an optional way to manage the files on your Authoring Directory. The Content Manager provides the same basic functionality as a standard FTP client.

### **SETTING UP YOUR FTP CONNECTION**

To setup your FTP connection, you will first need to locate your FTP information. See *Locating Your FTP Information*.

The process for enabling an FTP connection will differ depending on the third-party tool you use. Refer to the vendor's documentation for more information.

While third-party FTP tools each provide their own sets of features and benefits, Microsoft Windows includes functionality for managing an FTP connection. For more information, view the article from Microsoft at the following location: <http://windows.microsoft.com/en-US/windows-vista/File-Transfer-Protocol-FTP-frequently-asked-questions>

Once your connection is established, you can manage files on your Authoring Directory using your chosen FTP-connected third-party tool. When you access the Content Manager, it will reflect changes made via your third-party tool.

#### **★ Tips**

- When using a third-party tool connected via an FTP connection, changes made to your Authoring Directory may not reflect instantly within the Content Manager. Click the Refresh button to refresh the Content Manager display to show any files or folders changed via an FTP-connected third-party tool.

- When using FTP-connected third-party tools, it is possible for more than one authoring administrator to make changes to your Authoring Directory simultaneously. Develop internal procedures to ensure that multiple authors can work together without issue.

## LOCATING YOUR FTP INFORMATION

1. Click **Email FTP Account Information** from the Courses tab.
2. Enter a unique password in the **Create Password** box. This password will be used to open a .zip file containing your Authoring Directory FTP information.
3. Enter the same password in the **Confirm Password** box.
4. Click **Send**. A confirmation prompt appears, specifying the e-mail address to which the FTP information is sent. The FTP information is sent to the address on file for your administrator account.
5. View the e-mail sent to you with the subject *Authoring Center FTP Information*. This e-mail includes an attached .zip file.
6. Save the .zip file to your computer and open it.
7. When prompted, enter the password you created in step 2. Within the .zip file you will find your institution name, Authoring Directory user ID, Authoring Directory password, and basic instructions for establishing an FTP connection. *Note: Your Authoring Directory user ID and password are different from your HLC user ID and password.*

## CREATING CONTENT

### CONNECTING A THIRD-PARTY TOOL TO THE AUTHORIZING DIRECTORY

While the Content Manager and HTML Editor allow you create and manage authored activity asset, the use of these tools is not strictly necessary. You may use any third-party HTML authoring tool to create content and then upload that content to the Authoring Directory, provided those assets meet Authoring Center Policies and Guidelines. You can also manage your Authoring Directory via an FTP connection with an FTP client.

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- The user ID specified for that address.
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Once your connection is established, you can manage files on your Authoring Directory using your chosen FTP-connected third-party tool. When you access the Content Manager, it will reflect changes made via your third-party tool.

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- When using a third-party tool connected via an FTP connection, changes made to your Authoring Directory may not reflect instantly within the Content Manager. Click the Refresh button to refresh the Content Manager display to show any files or folders changed via an FTP-connected third-party tool.
- When using FTP-connected third-party tools, it is possible for more than one authoring administrator to make changes to your Authoring Directory simultaneously. Develop internal procedures to ensure that multiple authors can work together without issue.

## **HTML EDITOR OVERVIEW**

The HTML Editor allows you to create and customize authored content from within the HLC. You can choose to create content using the HTML Editor, or you can develop content in a third-party HTML authoring tool and upload it to the Authoring Directory. See *Uploading Files* in this document for more information.

### **ACCESSING THE HTML EDITOR**

There are two ways to access the HTML Editor:

- Click **Add New Page** from the Content Manager. See *Adding a Page* in this document for more information.
- Double-click any page from the Content Manager. See *Editing a Page* in this document for more information.

## **ADDING TEXT TO A PAGE**

Text content can be written directly in the HTML Editor, or copied and pasted from a number of other applications.

### To create text within a page

You can type content directly within the HTML editor. By default, the HTML Editor begins each new paragraph with no formatting. If you are applying formatting as you type, you will find that formatting does not persist from paragraph to paragraph. It may be easier to input your text content first, then go back and format as needed.

1. Click your mouse within the preview area of the HTML Editor.
2. Begin typing.
3. Use the text formatting tools to format text as desired.

## COPYING FORMATTED TEXT FROM MICROSOFT WORD AND OTHER APPLICATIONS

Text can be copied from Microsoft Word, Internet Explorer, or other applications and pasted into the HTML Editor. Text copied from Word or another text editor program may carry formatting with it; the HTML Editor will translated that formatting as indicated by the paste option you select.

### To copy and pasted text from another application

1. Highlight and copy the selected text.
2. In the HTML Editor, click the **Paste Options** menu.
3. Click the desired **Paste Option** from the list. Paste options include:
  - **Paste:** The content is pasted and the HTML pastes the formatting with no conversion. If you are pasting content copied from Word, a dialog will open and ask if you'd like to clean the Word markup. Click **OK** to allow the HTML Editor to clean the markup.
  - **Paste from Word:** The HTML Editor will retain Word formatting but strip any proprietary Word formatting that may display incorrectly when rendered in HTML.
  - **Paste from Word, strip font:** The HTML editor will strip Word-specific formatting from the content plus all font formatting.
  - **Paste Plain Text:** The HTML Editor removes all formatting except line breaks.
  - **Paste as HTML:** This option allows you to paste HTML content from the clipboard as code. Use this when copying and pasting HTML code.
  - **Paste HTML:** This dialog allows you to paste HTML code into the editor's current selection and render it. Use this when you need to enter predefined HTML code such as a media embed source.

It is recommended that you paste content as Plain Text. While the Paste, Paste from Word, and Paste from Word, strip font options can allow you to retain formatting, the formatting tags retained can make it difficult to closely control the appearance of your text. Using the Paste Plain Text option ensures that the content you paste will be clean of formatting.

## Images

### ADDING IMAGES TO A PAGE

You can upload images to your Authoring Directory and then place those images in your page. Images must be uploaded to an “images” folder in the Authoring Directory in advance of editing the page. Images can be added in the following formats:

- .gif
- .jpe
- .jpeg
- .jpg
- .png

## ADDING AN UPLOADED IMAGE TO A PAGE

1. Position the cursor at the place where you'd like to insert the image.
2. Click the Image Manager button from the toolbar to open the Image Manager dialog. This tool allows you to place and format images on your page.
3. Use the Image Manager to navigate your Authoring Directory and locate the image you'd like to insert.
4. Navigate the tree structure to locate the files. The Image Manager defaults to open the content folder that contains the current page you are editing. *Note: All images placed within this page must fall within the same content folder.*
5. If the Image Manager lists more than 100 images in a folder, use the paging slider to navigate to the rest of the pages.
6. Click the image that you'd like to insert. A preview of the image appears in the right-hand side of the dialog.
7. Click the **Properties** tab if you'd like to adjust the image's properties.
8. Click **Insert**.

## ADDING AN IMAGE HOSTED ON A WEB SERVER TO A PAGE

If an image is hosted on a public web server, you can place it within your authored content. Remember that users must have access to the web server in order to see the images. You should also carefully consider copyright whenever copying images from the Internet.

You cannot copy an image from your computer's desktop or hard drive and paste it into the page; the image must be hosted on the web or uploaded to your Authoring Directory and placed within your content.

1. Right-click the image from the web and copy it.
2. In the HTML Editor, position the cursor at the place where you'd like to insert the image.
3. Click the **Paste Options** button to open the Paste Options list.

4. Click **Paste from Word**. The image is pasted from your clipboard onto the page.

## ADJUSTING IMAGE PROPERTIES

Once an image is placed in a page, you can edit the properties of the image.

1. Right-click the image in the preview window and select **Properties** to open the *Properties* window.
2. Adjust the properties as needed.
  - Use **Width** and **Height** to adjust the size of the image. You should avoid resizing an image to be larger than its original size. This causes it to appear blurry and distorted. It is acceptable to make images smaller. You can also resize images by clicking and dragging the resize points around the perimeter of the image.
  - Add a **Border Width** (in pixels) and a **Border Color** to add a border to the image. A value of 0 (zero) shows no border.
  - Add **Alt Text** to indicate text that will appear when the user hovers their mouse over the image. This text is also available to screen readers for users with disabilities.
  - Use the **Image Alignment** menu to select how the image will appear in relation to the other content on the page. You can use this feature to align the image to the right or left of the text. When doing so, remember that the top corner of your image will align with the text in relation to where your cursor was when you placed the image. If you want the top of the image to align to the top of a paragraph, you should place the image in the page when the cursor is at the beginning of the paragraph.
  - Use the **Margin** fields to indicate the amount of blank space that should appear around the sides of the image.
3. Click **OK**.

## ADDING LINKS TO A PAGE

You can create links to web sites and e-mail addresses using the Hyperlink Manager within the HTML Editor.

### To insert a link

1. Select the text or object that you want to set as a hyperlink.
2. Click the **Hyperlink Manager** button to open the *Hyperlink Manager* window.
3. In the **URL** box, enter the web address that you wish for the link to open.
4. In the **Target** list, select **New Window**. This will force the link to open in a new window. It is recommended that all URL links open in a new window as to avoid interrupting the student's session in the content.
5. Click **OK**.

### TO INSERT A LINK TO AN EMAIL

1. Select the text or object that you want to set as a hyperlink.

2. Click the **Hyperlink Manager** button to open the *Hyperlink Manager* window.
3. Click the **E-mail** tab.
4. In the **Address** box, enter the desired e-mail address. This will pre-populate the recipient address in the user's e-mail.
5. Click **OK**.

★ **Tips**

- When adding links to web sites, be sure to consider firewall settings within your organization.

## ADDING AUDIO TO A PAGE

You can add audio to any page. Audio can be added in the .au or .mp3 format. By default, audio files placed in a page are represented by a media player, which allows the viewer to play, pause, stop, fast-forward, rewind, and adjust the volume of the audio file. This media player can be hidden; see *Hiding the Media Player for Audio Files*.

➡ **To add audio to a page**

1. Position the cursor at the place where you'd like to insert the media player.
2. Click the **Media Manager** button from the toolbar. The *Media Manager* dialog box appears. This tool allows you to select uploaded audio or video files from the Authoring Directory. See *Uploading Files* for more information.
3. Use the *Media Manager* to navigate your Authoring Directory and locate the audio file you'd like to insert.
4. Navigate the tree structure to locate the files. The *Media Manager* defaults to open the content folder that contains the current page you are editing. Remember that all files placed within this page must fall within the same content folder.
5. If the *Media Manager* lists more than 100 files in a folder, use the paging slider to navigate to the rest of the pages.
6. Click the audio file that you'd like to insert. The default media properties display on the right-hand side of the dialog.
7. Click **Insert**. The media player is inserted into your page.

## ADDING VIDEO TO A PAGE

You can add video to any page. By default, video files placed in a page are presented in the media player, which allows the viewer to play, pause, stop, fast-forward, rewind, and adjust the volume of the file. Video files cannot exceed 25 MB. Video can be added in the following formats:

- f4v

- flv
- mov
- mp2
- mpa
- mpv2
- swf

### To add video to a page

1. Position the cursor at the place where you'd like to insert the media player.
2. Click the **Media Manager** button from the toolbar. The *Media Manager* window appears. This tool allows you to select uploaded audio or video files from the Authoring Directory.
3. Use the *Media Manager* to navigate your Authoring Directory and locate the file you'd like to insert.
4. Navigate the tree structure to locate the files. The *Media Manager* defaults to open the content folder that contains the current page you are editing. Remember that all files placed within this page must fall within the same content folder.
5. If the *Media Manager* lists more than 100 files in a folder, use the paging slider to navigate to the rest of the pages.
6. Click the video file that you'd like to insert. The default media properties display on the right-hand side of the dialog.
7. Click **Insert**. The media player is inserted into your page.

### Tips

- Be cautious when adjusting the width and height of a video using the **Properties** tab of the *Media Manager*. Adjusting these properties can cause your video to display incorrectly. If you adjust the size of your video, take care to keep the aspect ratio in place to avoid stretching the video.

## Tables

### ADDING TABLES TO A PAGE

Tables can be created directly within the HTML Editor. There are two ways to create a table using the HTML Editor: the click-and-drag Table Builder or the Table Wizard. While the Table Builder is faster, the Table Wizard may be more appropriate for complex tables.

Many table properties can be adjusted by right-clicking within a table cell, including the ability to add rows and columns, delete rows, merge cells, split cells, delete cells, specify widths and heights, and access cell properties.

## CREATING A TABLE USING THE TABLE BUILDER

### ➤ To create a table using the Table Builder

1. Position the cursor where you want to create the table.
2. Click the **Insert Table** button on the toolbar.
3. Click and drag the cursor to select the number of rows and columns you want.

## CREATING A TABLE USING THE TABLE WIZARD

### ➤ To create a table using the Table Wizard

1. Position the cursor where you want to create the table.
2. Click the **Insert Table** button on the toolbar.
3. Click the **Table Wizard** button. The *Table Wizard* window appears; you can use this wizard to create your tables and set its properties. By default, the **Table Design** tab appears.
  - Click **+** or **-** next to **Columns** and **Rows** to add or remove columns or rows.
  - Click **+** next to **Column Span** to merge the right cell with the cell you have selected. Click the **-** button to unmerge the left cell.
  - Click **+** next to **Row Span** to merge the bottom cell with the cell you have selected. Click the **-** button to unmerge the bottom cell.
  - Click the **Properties** tab to alter the properties of the entire table.
  - Click the **Cell Properties** tab to alter the properties of individual cells. Select a cell in the preview area and then adjust properties in the Cell Properties area.
4. Click **OK** to insert your table.

## ABOUT BORDERS

The HTML Editor will default to display a dotted line border between all cells. This border will not be visible when the page is published. To configure visible border properties, click within any cell and use the border properties that display beneath the Preview window. You should add a Border Color and a Border Width of at least 1 in order to display a visible border.

## ABOUT SIZING TABLES

When creating a table within the HTML Editor, first specify the dimensions of your table. A small table with no content will be placed in your page. Click the outer border of the table and drag the corners to resize the overall table. Then use the table and cell properties controls, as described below, to size your cells, rows, and columns as needed.

Consider using percentage values to size cells, rows, and columns to one another. This allows you to maintain an overall table size while carefully adjusting the content within the table.

## ADJUSTING CELL PROPERTIES

1. Right-click inside an existing table and select **Cell Properties** from the menu. This opens the **Cell Properties** tab of the *Table Wizard*.
2. Use the **Cell Properties** options to set the appearance of the selected cell:
  - Specify the **Height** and **Width** of the cell in the **Dimensions** area. Values can be input in pixels or in percents; to input a pixel value, simply enter a numeric value. To enter a percentage value, input the numeric value followed by a % sign. Note that this may adjust the properties of your rows and columns.
  - Click the **Content Alignment** box to select how content aligns within the selected cell.
  - Click the **Background** box to set the background color of the cell.
  - Click the **Background Image** field to set an image as the cell background.
  - Enable the **No Text Wrapping** check box if you do not want to force a new line when text reaches the cell border.

## ADJUSTING TABLE PROPERTIES

1. Right-click inside an existing table and select **Table Properties** from the menu. This opens the **Table Properties** tab of the *Table Wizard*.
2. Use the **Table Properties** options to set the appearance of the table:
  - Specify the **Height** and **Width** of the table in the **Dimensions** area. Values can be input in pixels or in percents; to input a pixel value, simply enter a numeric value. To enter a percentage value, input the numeric value followed by a % sign.
  - Use the **Background** box to set the background color of the table.
  - Use the **Alignment** box to align the table to the left, center, or right side of the page.
  - Use the **Cell Spacing** box to increase or decrease the space between the borders of all cells in the table.
  - Use the **Cell Padding** box to increase or decrease the space between the content and the border of all cells in the table.
  - Use the **Border** controls to set a border width, color, and layout for the table.

## PREVIEWING YOUR AUTHORED LEARNING ACTIVITY

Authored HTML learning activities can be previewed from the *Course Builder* page, once the authored learning activity has been added to the course and the authored content folder has been associated with the learning activity.

1. Add a course.
2. Add an authoring center learning activity.

3. Complete the common properties for the learning activity and Save.
4. Click **Content Manager** to search for the desired authored content.
5. Select the authored content folder to associate with the learning activity.
6. Click **Save** to save the association.
7. Click **Preview Pages** in the content management window to display the content in a secondary window.  
This window displays how the content will appear to students when it is viewed through your course.

## UPDATING PUBLISHED AUTHORED CONTENT

You may update authored content after the course has been published. However, note that students will not see the edits you save until the course is re-published or a new course version is created.

## CONVERTING POWERPOINT SLIDES TO IMAGES FOR USE IN AUTHORED LEARNING ACTIVITIES

Although it is recommended that you use the HTML Editor or a third-party HTML authoring tool to create your authored learning activities in an HTML format, you can convert PowerPoint (PPT) presentations into individual image files and then add them to your HTML pages.

It is recommended that you have your PowerPoint presentation complete and ready to import before beginning these steps.

Within the HTML Editor, you will need to create a page for each PowerPoint slide and number them sequentially if you want each slide to appear as a separate screen. An alternative (though not recommended) is to add all PowerPoint slides into a single content page. This would require students to scroll down the screen to view the entire activity.

Follow three steps to assemble your PowerPoint content:

1. Resize your slides, if necessary. It is recommended that students view courseware on a monitor set to 1024 x 768 pixel resolution, but if your students are using a screen that has less resolution (for example, 800x600 pixel resolution), it is suggested that you start by resizing your slides.
2. Convert your PowerPoint slides to .jpeg images.
3. Add the images to pages using the HTML Editor.

### RESIZING YOUR SLIDES

If your students are viewing the Authoring Center learning activity on a monitor with a resolution that is smaller than 1024 x 768 pixels, it is suggested that you resize your PowerPoint presentation slides prior to converting them to JPEG images. The following instructions are suggestions for 800 x 600 resolution screens. For your particular system, you may have to experiment to find the optimal size. These instructions are written for PowerPoint 2007. Consult PowerPoint Help documentation for specifics about other versions.

1. Open your PowerPoint presentation.
2. Click the Design menu item and double-click Page Setup.

3. Enter a value of 6 inches for the width and 4.5 inches for the height.
4. Save your file.

### **CONVERTING YOUR POWERPOINT SLIDES TO JPEG IMAGES**

1. Open your PowerPoint presentation.
2. Select Save As from the menu.
3. Under Save as type, select JPEG File Interchange Format.
4. Click **Save**. A confirmation prompt will appear and ask if you want to export every slide in the presentation.
5. Click **Yes**. A confirmation pop-up will appear showing that each slide in your presentation has been saved as a separate file in the folder containing your presentation.
6. Click **OK**.

### **ADD THE IMAGES TO PAGES USING THE HTML EDITOR**

With your PowerPoint converted to image files, you can then add these images to pages using the HTML Editor.

1. Create a folder for your content, and create an "images" sub-folder within it.
2. Upload your image files to the images sub-folder within the Authoring Directory.
3. Add a page that will contain your first slide image.
4. Place your slide image in the page.
5. Repeat steps 2 through 4 for subsequent slide images.

#### **★ Tips**

- Plain PowerPoint templates with a light background and dark text work best.

## **COURSEWARE EXCHANGE**

### **COURSEWARE EXCHANGE OVERVIEW**

The Courseware Exchange is a content directory built directly into the HLC that allows you to access a large library of content that you use in your own Authoring Directory. By default, the Courseware Exchange includes two sub-directories:

- **HealthStream Regulatory Exchange:** This exchange is comprised of non-accredited versions of the HealthStream Core Regulatory courses.
- **Courseware Exchange Community:** This exchange is comprised of courses developed and published to the Courseware Exchange by other customers.

Additionally, customers who have purchased the A.D.A.M. Pro Resource Library will see yet another exchange - the Authoring Pro Exchange. This exchange houses shared authored activities that include A.D.A.M. resources.

### **ABOUT THE HEALTHSTREAM REGULATORY EXCHANGE**

You can also use the Courseware Exchange to access non-accredited versions of the HealthStream Core Regulatory courses.

You can copy these courses to your Authoring Directory and edit the Regulatory Courses to match your organization's policies and procedures. You may also use the Regulatory Courses as templates for creating your own custom content.

See Searching the Courseware Exchange and Copying from the Courseware Exchange in this document for more information.

### **ABOUT THE COURSEWARE EXCHANGE COMMUNITY**

The Courseware Exchange allows customers to share courses with one another. Courses published to this exchange can be copied to your Authoring Directory for use in authoring your own content. See Searching the Courseware Exchange and Copying from the Courseware Exchange in this document for more information.

When publishing courses, you can elect to share to the Courseware Exchange. See Publishing a Course for more information.

## **SEARCHING THE COURSEWARE EXCHANGE**

### **To search the Courseware Exchange:**

1. On the **Courses** tab, click **Courseware Exchange**. The Courseware Exchange page appears.
2. Conduct a search. You can search by whole word or partial word + wildcard. You can also browse alphabetically, if you wish.
3. Select the **Exchange** check boxes to filter your search as needed.
  - Select the **HealthStream Regulatory Exchange** check box if you'd like to search HealthStream-developed assets.
  - Select the **Courseware Exchange Community** check box if you'd like to search customer-created assets.
  - If available, select the **Authoring Pro Exchange** check box if you'd like to search customer-created assets that include A.D.A.M. resources. The Authoring Pro Exchange check box is only available to customers who have purchased the A.D.A.M. Pro Resource Library.
4. Click **Search**. The system will return a listing of all courses in the Courseware Exchange that match your search criteria.
5. Click the name of the selected course/template to view more details about it. The course overview will open in a second window.
6. Click **Preview** to preview the content.

You can copy this course to Course Builder and edit it, if you wish.

## COPYING FROM THE COURSEWARE EXCHANGE

You can copy courses from the Courseware Exchange into your Authoring Directory. Once copied, you can access the course through your Content Manager and edit pages using the HTML Editor, or download the content and edit it using a third-party HTML authoring tool.

### To copy a course from the Courseware Exchange:

1. Conduct a search of the Courseware Exchange and select the content you wish to copy.
2. From the Course Overview window, click **Copy**. The Courseware Exchange policies will display.
3. Click **I Agree**. A message bar will confirm that the course has been copied from the Courseware Exchange to your Authoring Directory.
4. Click **Close Window**. The course is now available in your site as an unpublished course.
5. Search for the course from the **Manage Courses** link on the Courses tab. Note that all authored learning activities, tests, and/or evaluations contained in the course are copied. When copied, the course content is placed within a content folder in your Authoring Directory. The folder name will follow the naming convention of *CourseTitle\_NumericIdentifier*.

With the content copied, you can use these assets to develop your own custom content. Access the Content Manager to:

- Edit the course pages as needed using the HTML Editor. See *Editing a Page* for more information.
- Download pages locally and edit them using a third-party HTML authoring tool. See *Downloading Files, Folders, and Pages* for more information. Remember that files edited with a third-party tool must be uploaded to the Authoring Directory before you can use this content in a course.

## PUBLISHING TO THE COURSEWARE EXCHANGE

Courses that you create using the Course Builder can be published to the Courseware Exchange, provided that they do not contain attachments or SCORM content.

Once published, other customers can access the course and copy it to their Authoring Directory for use in developing their own customer content.

### To publish a course to the Courseware Exchange:

1. Follow the course publishing procedure, as outlined in *Publishing a Course*.
2. Be sure to select the **Add this course to the Courseware Exchange** check box when selecting publishing settings. When this check box is selected, the page will refresh to display the available courseware exchanges available to your organization.

3. Select the check boxes next to the names of the exchanges to which you will share this course. *Note: If you have utilized A.D.A.M. Pro Resource Library assets in the content, you must choose only the **Authoring Pro Exchange** option when sharing your authored content.*

## SCORM

### ADDING SCORM CONTENT TO HLC COURSES

SCORM content developed in Lectora or any other SCORM development tool can be delivered through the HealthStream Learning Center (HLC) as an authored SCORM learning activity.

#### **LECTORA USERS**

Lectora users can upload SCORM content directly from Lectora to the HLC. To do so, you must:

1. Install the **Upload to HealthStream** service pack.
2. Prepare your Lectora content for upload to the HLC.
3. Upload your Lectora content to the HLC.
4. Add your uploaded content as an authored SCORM activity to an HLC course.

# HealthStream ePortfolio™

## VIEWING A STUDENT'S EPORTFOLIO INFORMATION

ePortfolio information is entered by students, or imported through a data import file, and can be viewed from the Manage a Student page.

### To view a student's ePortfolio information:

- I. Search for the student whose ePortfolio information you want to see.
  - I.1. Click the **People** tab to open the People page.
  - I.2. Click the **Manage Students** link to open the Manage Students page.
  - I.3. Enter search criteria.
    - You can type more than one user ID in the **User ID(s)** box. Separate them with commas or put each ID on a separate line.
    - You can click the **Advanced Search** link to display additional search criteria.
  - I.4. Click the **Search** button.
  - I.5. From the search results, click a name to open the Manage a Student page.
    - If the student for whom you are looking does not appear in the search results, he or she might be inactive. Search again, and be sure to select the *Inactive* or the *Both Active and Inactive* Status option.
2. From the left-hand navigation page click the link that corresponds to the information that you want to see (**Work Experience, Memberships, etc.**).

## MARKING EPORTFOLIO INFORMATION AS VERIFIED

If a student updates information that has been marked as verified, the verified flag will be removed. Removing a document attached to a previously verified record will also remove the verified flag. Attaching a document to a previously verified record will not affect the verified flag.

### To mark a student's ePortfolio information as verified:

- I. Search for the student whose ePortfolio information you want mark as verified.
  - I.1. Click the **People** tab to open the People page.
  - I.2. Click the **Manage Students** link to open the Manage Students page.

1.3. Enter search criteria.

- You can type more than one user ID in the **User ID(s)** box. Separate them with commas or put each ID on a separate line.
- You can click the **Advanced Search** link to display additional search criteria.

1.4. Click the **Search** button.

1.5. From the search results, click a name to open the Manage a Student page.

- If the student for whom you are looking does not appear in the search results, he or she might be inactive. Search again, and be sure to select the *Inactive* or the *Both Active and Inactive Status* option.

2. From the left-hand navigation page click the link that corresponds to the information that you want mark as verified (**Work Experience, Memberships, etc.**).

3. Select the **Verified** check box next to the information that you have verified.

## WHAT IS HEALTHSTREAM'S PORTFOLIO ASSISTANT ?

HealthStream's Portfolio Assistant is a set of tools and features in the HLC to help collect, validate and prepare select nursing demographic data required by the Magnet Recognition Program® Demographic Data Collection Tool™ (DDCT).

The American Nurses Credentialing Center created the Magnet Program in the early 1990's. When hospitals achieve Magnet designation, it means they have met the high-quality standards for their nursing organization. One of about 48 standards is the annual demographic data file.

The specific data that the Portfolio Assistant helps to organize is nursing degree level with field of study and professional certifications.

HealthStream does not collect all data required for the DDCT. For example, HealthStream does not collect budget information and turnover rates. This data must be collect from other sources.

For a complete list of all DDCT data requirements, visit [www.nursecredentialing.org](http://www.nursecredentialing.org)

## PROFILE ASSISTANT ROLES

Role Name	Who gets this role?	What can this role do?
Portfolio Coordinator - Admin	Assigned to HLC Admin	<ul style="list-style-type: none"> <li>• Create, publish and assign profile activities to nurses</li> </ul>

		<ul style="list-style-type: none"> <li>• Manage profile activity completions through assignment completion reports</li> <li>• All functions of Portfolio Coordinator</li> </ul>
Portfolio Coordinator	Assigned to Magnet Program Director	<ul style="list-style-type: none"> <li>• Select affiliations to include in Magnet reports</li> <li>• Map job titles and departments</li> <li>• Validate collected and mapped data through reports</li> <li>• Validate results prepared for the DDCT</li> <li>• Submit results using DDCT online portal</li> </ul>
Portfolio Coordinator - Reporter	Assigned to Magnet Program Assistant	<ul style="list-style-type: none"> <li>• Validate collected and mapped data through reports</li> <li>• Validate results prepared for the DDCT</li> </ul>

## PORTFOLIO ASSISTANT VIEWS

### PORTFOLIO ASSISTANT VIEWS

Portfolio Assistant views enable you to specify the affiliations that are included in Portfolio reports. Once a view is configured, everyone who runs Portfolio reports from that view will see data from the same affiliations.

### CREATING EPORTFOLIO VIEWS

 To create a Portfolio Assistant view:

1. Click the **Tools** tab to open the *Tools* page.

2. Click the **Portfolio Assistant** link to open the *Portfolio Assistant Views* page.
3. Click the **Create New View** button to open the *Portfolio Assistant* page.
4. Type a name for the view in the **View Name** box.
5. Click the **Select Affiliation(s) to Include in Report** link to open the *Find Affiliation(s)* page.
6. Select the check box next to the affiliations that you want to include in reports.
7. Click the **Select** button to select the affiliations and return to the *Portfolio Assistant* page.
8. If necessary, you can map job titles to DDCT job categories from the *Portfolio Assistant* page. (If your job titles have already been mapped, this step may not be necessary.)
  - 8.1. Click the **Map Job Titles to DDCT Job Categories** link to open the *Manage Job Title to DDCT Job Category Mappings* page.
    - If your organization has many job titles, they may be presented over several pages. Use the **Previous**, **Next**, and page number links [ << < [Previous](#) [1](#) [2](#) [3](#) [Next](#) >> >> ] to move from page to page. You may be able to display all of your job titles on a single page by selecting a high value from the **Results per page** list.
  - 8.2. From the **Select Affiliate to Map** list, select the institution whose job titles you want to map.
  - 8.3. For each job title that you want to include in DDCT reports, select an job category from the **DDCT Job Category** list.
  - 8.4. Click **Save**.
  - 8.5. If necessary, select another institution from the **Select Affiliate to Map** list and map its job titles.
  - 8.6. Click the **Return To Portfolio Assistant** link to return to the *Portfolio Assistant* page.
9. If necessary, you can map an institution's departments to DDCT unit types from the *Portfolio Assistant* page. (If your departments have already been mapped, this step may not be necessary.)
  - 9.1. Click the **Map Departments to DDCT Unit Type** link to open the *Manage Departments to DDCT Unit Mappings* page.
    - If your organization has many departments, they may be presented over several pages. Use the **Previous**, **Next**, and page number links [ << < [Previous](#) [1](#) [2](#) [3](#) [Next](#) >> >> ] to move from page to page. You may be able to display all of your departments on a single page by selecting a high value from the **Results per page** list.

- 9.2. From the **Select Affiliate to Map** list, select the institution whose departments you want to map.
  - 9.3. For each department that you want to include in DDCT reports, select a unit type from the **DDCT Unit Type** list.
  - 9.4. Click **Save**.
  - 9.5. If necessary, select another affiliation from the **Select Affiliate to Map** list and map its departments.
  - 9.6. Click the **Return To** Portfolio Assistant link to return to the *Portfolio Assistant* page.
10. Click the **Save** button to save the view.

## DELETING PORTFOLIO ASSISTANT VIEWS

 To delete a Portfolio Assistant view:

1. Click the **Tools** tab to open the *Tools* page.
2. Click the **Portfolio Assistant** link to open the *Portfolio Assistant Views* page.
3. Click the **Delete** button next to the view that you want to delete.
4. When you are prompted to confirm the deletion, click **OK**.

## PORTFOLIO ASSISTANT REPORTS

### PORTFOLIO REPORTS

Three reports are available to validate the information that has been collected and mapped. The fourth report displays the actual results (FTE counts) that are required for submission.

- The DDCT Certification List report displays a list of professional certifications held by nursing staff for selected affiliations.
- The DDCT Department Mapping report displays a list of mapped and unmapped departments for selected affiliations.
- The DDCT Details report displays all related data collected and mapped for the DDCT education and certification results for selected affiliations.
- The DDCT Results Report displays education and certification FTE counts for selected affiliation for DDCT submissions.

## DDCT CERTIFICATION LIST REPORT

The DDCT Certification List report displays a list of professional certifications held by nursing staff for selected affiliations. You can run this report from the *Reports* page or from a Portfolio Assistant view.

### To run the DDCT Certification List report from the Reports page:

1. Click the **Reports** tab to open the *Reports* page.
2. Click the **DDCT Certification List Report** link to open the *DDCT Certification List Report* page.
3. Select the affiliations for which you want to run the report.
  - 3.1. Click the **Search the Hierarchy** link to open the *Find affiliation(s)* page.
  - 3.2. Select the check box next to the affiliations that you want to include on the report.
  - 3.3. Click the **Select** button to select the affiliations and return to the *DDCT Certification List Report*.
- The affiliations that you selected are displayed in the **Affiliations** box. You can clear the check box next to an affiliation to exclude it from the report.
4. Click the **Continue** button to run the report.
5. When you are prompted to open or save the report, click **Open** to open the report, or **Save** to save it to your computer.

### To run the DDCT Certification List report from a Portfolio Assistant View:

1. Click the **Tools** tab to open the *Tools* page.
2. Click the **Portfolio Assistant** link to open the *ePortfolio Views* page.
3. Click a view name to open the *Portfolio Assistant* page.
4. Click the **Run DDCT Certification List Report** link to open the *DDCT Certification List Report* page.
5. Click the **Continue** button to run the report.
6. When you are prompted to open or save the report, click **Open** to open the report, or **Save** to select a destination on your computer to save the file.

## DDCT DEPARTMENT MAPPING REPORT

The DDCT Department Mapping report displays a list of mapped and unmapped departments for selected affiliations. You can run this report from the *Reports* page or from a ePortfolio view.

➔ **To run the DDCT Department Mapping report from the Reports page:**

1. Click the **Reports** tab to open the *Reports* page.
2. Click the **DDCT Department Mapping Report** link to open the *DDCT Department Mapping Report* page.
3. Select the affiliations for which you want to run the report.
  - 3.1. Click the **Search the Hierarchy** link to open the *Find affiliation(s)* page.
  - 3.2. Select the check box next to the affiliations that you want to include on the report.
  - 3.3. Click the **Select** button to select the affiliations and return to the *DDCT Certification List Report*.
- The affiliations that you selected are displayed in the **Affiliations** box. You can clear the check box next to an affiliation to exclude it from the report.
4. Click the **Continue** button to run the report.
5. When you are prompted to open or save the report, click **Open** to open the report, or **Save** to save it to your computer.

➔ **To run the DDCT Department Mapping report from a ePortfolio view:**

1. Click the **Tools** tab to open the *Tools* page.
2. Click the **Portfolio Assistant** link to open the *Portfolio Assistant Views* page.
3. Click a view name to open the *Portfolio Assistant* page.
4. Click the **Run DDCT Department Mapping Report** link to open the *Portfolio Department Mappings Report* page.
5. Click the **Continue** button to run the report.
6. When you are prompted to open or save the report, click **Open** to open the report, or **Save** to select a destination on your computer to save the file.

## DDCT DETAILS REPORT

The DDCT Details report displays all related data collected and mapped for the DDCT education and certification results for selected affiliations. You can run this report from the *Reports* page or from a Portfolio Assistant view.

➔ **To run the DDCT Details report from the Reports page:**

1. Click the **Reports** tab to open the *Reports* page.
2. Click the **DDCT Details Report** link to open the *Demographic Data Collection - Details* page.
3. Select the affiliations for which you want to run the report.
  - 3.1. Click the **Select Affiliations** link to open the *Find affiliation(s)* page.
  - 3.2. Select the check box next to the affiliations that you want to include on the report.
  - 3.3. Click the **Select** button to select the affiliations and return to the *DDCT Certification List Report*.
    - The affiliations that you selected are displayed in the **Affiliations** box. You can clear the check box next to an affiliation to exclude it from the report.
4. Select the students to include on the report.
  - To include all active students, select the **Report on All Active Students** check box.
  - To include student groups, click the **Select a Student Group** link to search for and select student groups.
  - To include specific students, click the **Search for Students** link to search for and select students.
  - If you select more than one student group, each one will be displayed in the **Students** box. You can clear the check box next to a student group to exclude it from the report.
5. Click the **Continue** button to run the report.
6. When you are prompted to open or save the report, click **Open** to open the report, or **Save** to save it to your computer.

 **To run the DDCT Details report from a Portfolio Assistant view:**

1. Click the **Tools** tab to open the *Tools* page.
2. Click the **Portfolio Assistant** link to open the *Portfolio Assistant Views* page.
3. Click a view name to open the *Portfolio Assistant* page.
4. Click the **Run DDCT Details Report** link to open the *Demographic Data Collection - Details* page.
5. Select the students to include on the report.
  - To include all active students, select the **Report on All Active Students** check box.

- To include student groups, click the **Select a Student Group** link to search for and select student groups.
  - To include specific students, click the **Search for Students** link to search for and select students.
  - If you select more than one student group, each one will be displayed in the **Students** box. You can clear the check box next to a student group to exclude it from the report.
6. Click the **Continue** button to run the report.
  7. When you are prompted to open or save the report, click **Open** to open the report, or **Save** to save it to your computer.

## DDCT RESULTS REPORT

The DDCT Results Report displays education and certification FTE counts for selected affiliation for DDCT submissions. You can run this report from the *Reports* page or from a Portfolio Assistant view.

### To run the DDCT Results report from the Reports page:

1. Click the **Reports** tab to open the *Reports* page.
2. Click the **DDCT Results Report** link to open the *DDCT Results Report* page.
3. Select the affiliations for which you want to run the report.
  - 3.1. Click the **Select Affiliations** link to open the *Find affiliation(s)* page.
  - 3.2. Select the check box next to the affiliations that you want to include on the report.
  - 3.3. Click the **Select** button to select the affiliations and return to the *DDCT Certification List Report*.
    - The affiliations that you selected are displayed in the **Affiliations** box. You can clear the check box next to an affiliation to exclude it from the report.
4. Select the students to include on the report.
  - To include all active students, select the **Report on All Active Students** check box.
  - To include student groups, click the **Select a Student Group** link to search for and select student groups.
  - To include specific students, click the **Search for Students** link to search for and select students.

- If you select more than one student group, each one will be displayed in the **Students** box. You can clear the check box next to a student group to exclude it from the report.
5. From the **DDCT Units** list, clear the check box next to any units that you do not want to include on the report.
    - Clearing the **Select ALL** check box will clear all of the check boxes in the list. Selecting the **Select ALL** check box will select all of the check boxes in the list.
  6. From the **DDCT Positions** list, clear the check box next to any position that you do not want to include on the report.
    - Clearing the **Select ALL** check box will clear all of the check boxes in the list. Selecting the **Select ALL** check box will select all of the check boxes in the list.
  7. Click the **Continue** button to run the report.
  8. When you are prompted to open or save the report, click **Open** to open the report, or **Save** to save it to your computer.

➔ **To run the DDCT Results report from a Portfolio Assistant view:**

1. Click the **Tools** tab to open the *Tools* page.
2. Click the **Portfolio Assistant** link to open the *Portfolio Assistant Views* page.
3. Click a view name to open the *Portfolio Assistant* page.
4. Click the **Run DDCT Results Report** link to open the *DDCT Results Report* page.
5. Select the students to include on the report.
  - To include all active students, select the **Report on All Active Students** check box.
  - To include student groups, click the **Select a Student Group** link to search for and select student groups.
  - To include specific students, click the **Search for Students** link to search for and select students.
  - If you select more than one student group, each one will be displayed in the **Students** box. You can clear the check box next to a student group to exclude it from the report.
6. From the **DDCT Units** list, clear the check box next to any units that you do not want to include on the report.

- Clearing the **Select ALL** check box will clear all of the check boxes in the list. Selecting the **Select ALL** check box will select all of the check boxes in the list.
7. From the **DDCT Positions** list, clear the check box next to any position that you do not want to include on the report.
    - Clearing the **Select ALL** check box will clear all of the check boxes in the list. Selecting the **Select ALL** check box will select all of the check boxes in the list.
  8. Click the **Continue** button to run the report.
  9. When you are prompted to open or save the report, click **Open** to open the report, or **Save** to save it to your computer.

## PROFILE ACTIVITIES

### PROFILE ACTIVITIES

Profile activities are reminders to students to keep their profile information, like education and certifications, current in the system. Profile activities, like courses, are assigned to students and student groups, and appear on the *My Learning* page. Also like courses, profile activities must be published before they can be assigned.

When they create a profile activity template, administrators specify the type of profile information that students should verify (and, if necessary, update). When students open the activity from their *My Learning* page, they see the profile information that is currently in the system. Links are provided that enable students to update their profile.

For example, an administrator created a profile activity template and specified that education and certification information should be verified. This is what the activity looks like when a student opens it.

**PROFILE ACTIVITY** TOTAL TASKS: 2

### Education Add

**BA**  
 FIELD OF STUDY: Nursing DATES: Jul 2001 - Jun 2005 Manage  
 SCHOOL NAME: Vanderbilt University  
[Show additional information](#)

### Certifications Add

**CCRN-K : Acute Critical Care Knowledge Professional (Neonatal)** Manage  
 CERTIFICATION NUMBER: 123456789 COUNTRY: United States  
[Show additional information](#)

**Finish**

When the student has verified the information (and updated it, if necessary), he or she clicks the **Finish** button, and the profile activity is removed from the *My Learning* page. Completed profile activities do not appear on student transcripts, although they are included on assignment completion reports.

## CREATING A NEW PROFILE ACTIVITY TEMPLATE

Profile activity templates must be published before they can be assigned.

[View Show Me How](#)

**To create a new profile activity template:**

1. From the **People** tab, click the **Add Profile Activity Templates** link to open the *Add Profile Activity Template* page.
2. Fill out the form fields.
  - An asterisk (\*) indicates that a field is required.
  - Text that you type in the **Description** box will not be visible to students.

- Text that you type in the **Instructions** box will be visible to students and will appear at the top of the profile activity page.
3. From the **Profile Elements** section, select the check box next to the profile elements that you want students to verify.
  4. Click the **Save** button.

## EDITING PROFILE ACTIVITY TEMPLATES

After editing a profile activity template, you must publish it for the changes to take effect. If there are students who already have the profile activity assigned to them when you republish the template, they will see the changes immediately.

You cannot change the profile elements associated with a template.

### To edit a profile activity template:

1. From the **People** tab, click the **Manage Profile Activity Templates** link to open the *Search Profile Activity Templates* page.
2. Search for the profile activity template that you want to edit.
3. From the results list, click a template name to open the *Edit Profile Activity Template* page.
4. Edit the template as needed.
  - An asterisk (\*) indicates that a field is required.
  - Text that you type in the **Description** box will not be visible to students.
  - Text that you type in the **Instructions** box will be visible to students and will appear at the top of the profile activity page.
5. Click the **Save** button.

## DELETING PROFILE ACTIVITY TEMPLATES

You cannot delete a profile activity template that has been published.

### To delete a profile activity template:

1. From the **People** tab, click the **Manage Profile Activity Templates** link to open the *Search Profile Activity Templates* page.
2. Search for the profile activity template that you want to delete.

3. From the results list, click a template name to open the *Edit Profile Activity Template* page.
4. Click the **Delete** button to delete the template.

## Publishing Profile Activity Templates

### PUBLISHING PROFILE ACTIVITY TEMPLATES

Publishing a profile activity template makes it available for assignment. There are two publishing modes: quick and advanced.

Use quick publish when you need to publish a template to the institution at which you are currently logged on, and/or all of its subsidiaries.

Use advanced publish when you need to publish a template to the institution at which you are currently logged on, and/or specific subsidiaries.

### PUBLISHING PROFILE ACTIVITY TEMPLATES: QUICK PUBLISH

Use quick publish when you need to publish a template to the institution at which you are currently logged on, and/or all of its subsidiaries.

#### To publish a profile activity template using quick publish mode:

1. From the **People** tab, click the **Manage Profile Activity Templates** link to open the *Search Profile Activity Templates* page.
2. Search for the profile activity template that you want to publish.
3. From the results list, click a template name to open the *Edit Profile Activity Template* page.
4. Click the **Publish** link to open the *Publish Profile Activity Template* page.
5. If you want to publish the template to the institution at which you are currently logged on, select the **At this affiliation** check box.
6. If you want to publish the template to all of the institution's subsidiaries, select the **At subsidiary affiliations** check box.
7. Click the **Publish** button.

### PUBLISHING PROFILE ACTIVITY TEMPLATES: ADVANCED PUBLISH

Use advanced publish when you need to publish a template to the institution at which you are currently logged on, and/or specific subsidiaries.

#### To publish a profile activity template using advanced publish mode:

1. From the **People** tab, click the **Manage Profile Activity Templates** link to open the *Search Profile Activity Templates* page.
2. Search for the profile activity template that you want to publish.
3. From the results list, click a template name to open the *Edit Profile Activity Template* page.
4. Click the **Publish** link to open the *Publish Profile Activity Template* page.
5. Click the **Advanced Publish** button to open the *Advanced Publish Profile Activity Template* page.
6. Click the **Add Affiliation(s) to Receive Profile Activity Template** link to open the *Find affiliation(s)* page.
7. Search for the institutions to which you want to publish the template.
8. From the search results, select the check box next to the institutions to which you want to publish the template.
9. Click the **Select** button to open the *Advanced Publish Profile Activity Template* page.
10. For each selected institution, leave the **Publish** check box selected to publish the template to that institution.
11. For each selected institution, leave the **Subsidiary Affiliations** check box selected to publish the template all of that institution's subsidiaries.
12. Click the **Publish** button.

## ASSIGNING PROFILE ACTIVITY TEMPLATES

Profile activity templates are assigned like courses. See [Adding a Group Assignment](#) and [Adding an Individual Assignment](#) for more information about creating assignments.

### Related Topics

[Profile Activities](#)

[Creating a New Profile Activity Template](#)

[Editing Profile Activity Templates](#)

[Deleting Profile Activity Templates](#)

[Publishing Profile Activity Templates](#)

## WORKFORCE PROFILE DASHBOARD

## THE WORKFORCE PROFILE DASHBOARD

The Workforce Profile Dashboard displays data visualizations based on profile information entered by your organization’s employees. You can examine trends in profile data, view data distribution across groups, and download data in Microsoft Excel format for further analysis.

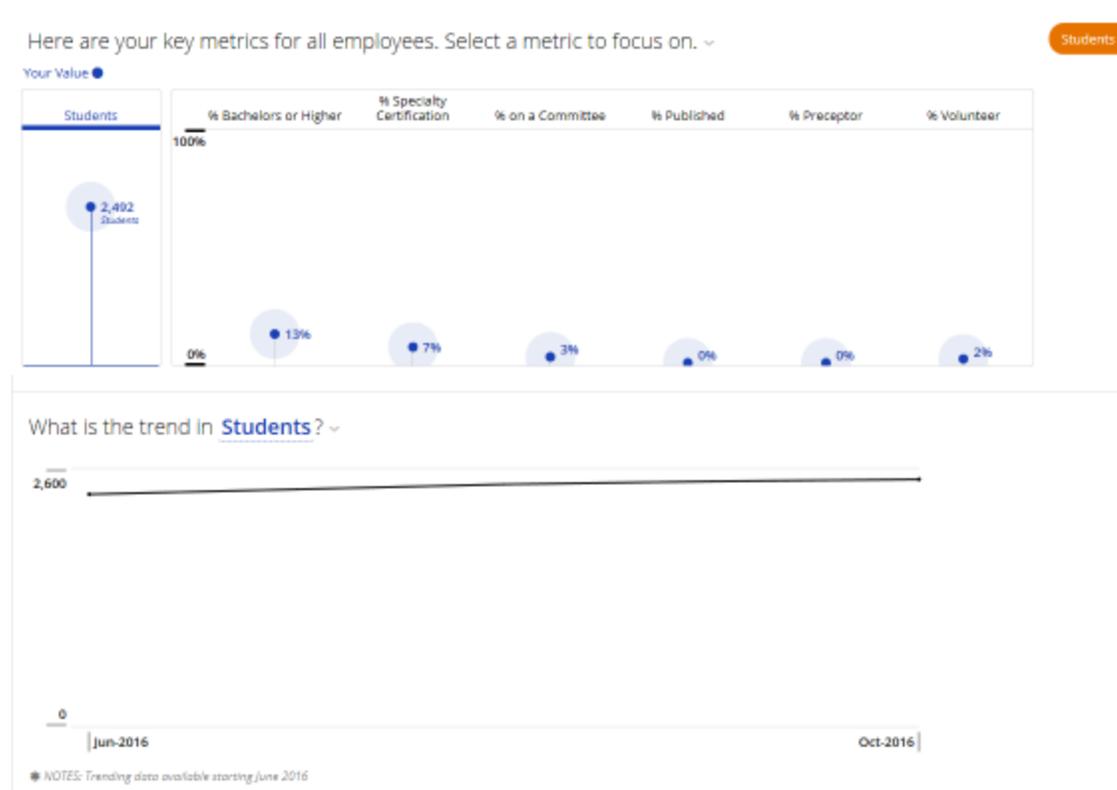
Your access to profile data is the same as your access to HLC student data. For example, if you only have access to Radiology department students in the HLC, you will only see profile data for members of the Radiology department in the Workforce Profile Dashboard.

The Workforce Profile Dashboard contains several sections, each of which displays or enables you to filter data about your organization’s employees.

The screenshot shows the Workforce Profile Dashboard interface. It includes a header with the title 'Workforce Profile Dashboard' and a sub-header 'Let's take a look at the profile of your workforce. Using the filters (upper right), choose the people you'd like to concentrate on. The results below will reflect your selections.' Below this is a section for 'Key Metrics' with a 'Select a metric to focus on' dropdown and several circular icons. A 'Trendline' section follows, titled 'What is the trend in Students?', showing a line graph. A 'Bar Graph' section is titled 'What does Students look like across Departments?' and displays a horizontal bar chart. An 'Employee Population' section is a table with columns for 'THOSE WITH' and 'THOSE WITHOUT' and rows for various categories. At the bottom, a summary box states 'We found 8 students.' and includes a 'DOWNLOAD DATA' button.

A global filter feature enables you to narrow the data that the dashboard displays, so you can focus on specific areas of your organization’s workforce.

## KEY METRICS AND TRENDLINE SECTIONS



The Key Metrics section displays a visual representation of your employees' profile data. In addition to the total number of employees ("students") who have entered professional profile information, this section also displays graphs for

**% Bachelors or Higher** – percentage of your workforce whose education records indicate a degree level of Bachelors, Masters, Doctorate, PhD, or MD, and the completion year is populated with a valid date.

**% Specialty Certification** – percentage of your workforce with a certification considered a specialty certification that has not expired.

**% on a Committee** – percentage of your workforce currently holding a position on a committee.

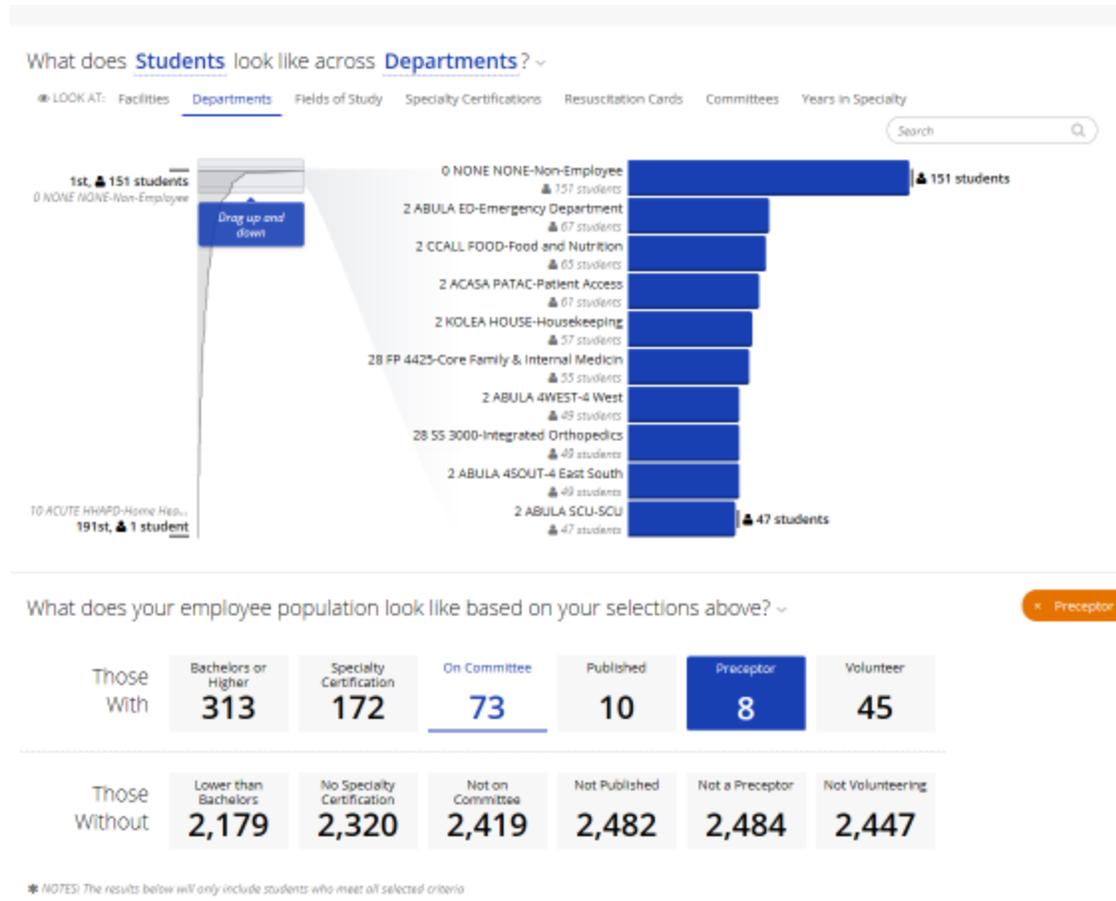
**% Published** – percentage of your workforce with a research & publication record that is marked as published.

**% Preceptor** – percentage of your workforce with a teaching & preceptorship record that has a type of Preceptorship and is marked as current.

**% Volunteer** – percentage of your workforce with a volunteer service record that is current.

Clicking a Key Metrics graph displays the trend for the selected metric in the Trendline section.

## THE BAR GRAPH AND EMPLOYEE POPULATION SECTIONS



The Bar Graph section displays how selected key metric data is distributed across the following groups:

- Facilities.
- Departments.
- Fields of Study.
- Specialty Certifications.
- Resuscitation Cards.
- Committees.
- Years in Specialty.

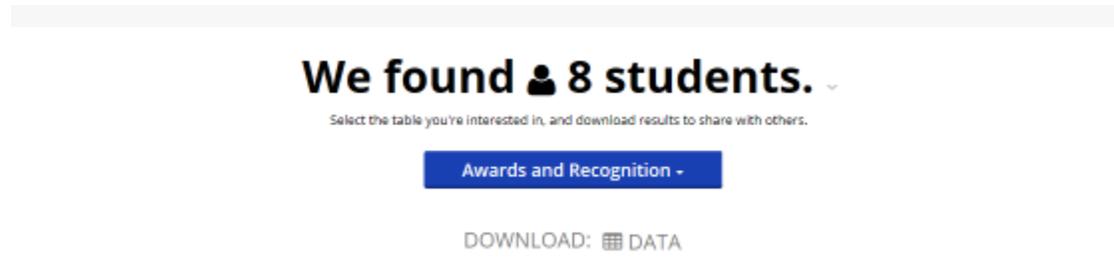
For example, if you select % **Bachelors or Higher** in the Key Metrics section, and then select **Departments** in the Bar Graph section, you will see a bar graph that displays how employees who hold at least a bachelor’s degree are distributed across all of the departments in your organization. Each bar will represent a different department in your organization.

Each bar in the bar graph is a filter: you can click bars to select them and filter the remaining sections of the dashboard to focus on the groups that you selected.

The Employee Population section displays statistics about your organization’s workforce. By default, all employees are included; if you selected any groups in the Bar Graph section, only those employees in the selected groups will be included in the Employee Population section.

Each statistic group in the Employee Population section (e.g., Bachelors or Higher, Not Published) acts as a filter: selecting a statistic group will restrict the data download to the students included in the selected groups.

## THE DATA DOWNLOAD SECTION



From the Data Download section, you can download the following kinds of profile data about your employees:

- Awards and Recognitions.
- Certifications.
- Committee Work.
- Education.
- Licenses.
- Memberships and Associations.
- Other.
- Research and Publications.
- Student Information.
- Teaching and Preceptorships.
- Volunteer Service.
- Work experience.

## VIEWING TRENDS IN PROFILE DATA

To view trends in profile data:

1. Click the **Reports** tab to open the Reports page.
2. Click the **Workforce Profile Dashboard** link (in the **Control Centers and Visualizations** section) to open the Workforce Profile Dashboard.
3. Set the global filter if needed (see Setting the Global Filter).
4. In the Key Metrics section, click the metric (% **Bachelors or Higher**, % **Published**, etc.) that you want to focus on.
5. The line graph in the Trendline section will display the trend for the selected metric.

## VIEWING PROFILE DATA DISTRIBUTION ACROSS GROUPS

To view profile data distribution across groups:

1. Click the **Workforce Profile Dashboard** link (in the **Control Centers and Visualizations** section) to open the Workforce Profile Dashboard.
2. Set the global filter if needed (see Setting the Global Filter).
3. In the **Key Metrics** section, click the metric (% **Bachelors or Higher**, % **Published**, etc.) that you want to focus on.
4. In the Bar Graph section, select a **Look At** category (**Facilities**, **Departments**, etc.) to display a bar graph that shows how employees in the selected metric are distributed across the category that you selected. For example, if you select **Facilities**, each bar will represent a facility in your organization; each bar will display the number of students in that facility included in the metric that you selected in the Key Metrics section. If the category that you selected contains too many groups (subcategories) than will fit in the section, you can drag the box on the left-hand side of the section to scroll through all of the available subcategories.

## VIEWING EMPLOYEE POPULATION STATISTICS

The Employee Population section displays statistics about your organization's workforce. By default, all employees are included; if you selected any bars in the Bar Graph section, only those employees in the selected groups will be included in the Employee Population section.

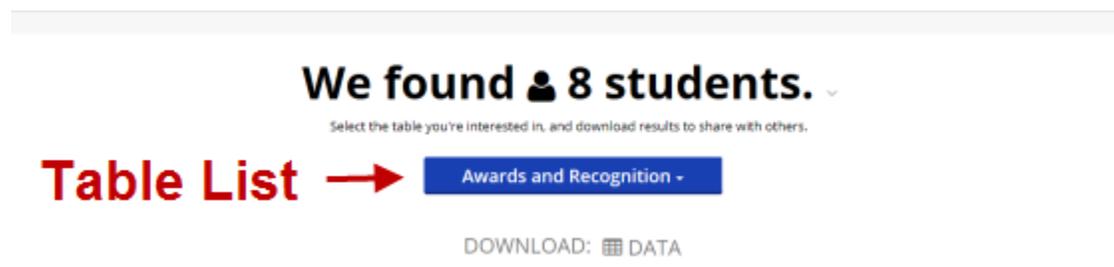
### To view employee population statistics:

1. Click the **Reports** tab to open the Reports page.
2. Click the **Workforce Profile Dashboard** link (in the **Control Centers and Visualizations** section) to open the Workforce Profile Dashboard.
3. Set the global filter if needed (see Setting the Global Filter).
4. In the Key Metrics section, click the metric (% Bachelors or Higher, % **Published**, etc.) that you want to focus on.
5. In the Bar Graph section, select a **Look At** category (**Facilities**, **Departments**, etc.) to display a bar graph that shows how employees in the selected metric are distributed across the category that you selected. For example, if you select **Facilities**, each bar will represent a facility in your organization; each bar will display the number of students in that facility included in the metric that you selected in the Key Metrics section. If the category that you selected contains too many groups (subcategories) than will fit in the section, you can drag the box on the left-hand side of the section to scroll through all of the available subcategories.
6. If you want to filter the data further, click individual bars to select them. Only students who are part of the selected subcategories will be included in the Employee Population section. To deselect a selected bar, click it again.

## DOWNLOADING PROFILE DATA

### To download profile data:

1. Click the **Reports** tab to open the Reports page.
2. Click the **Workforce Profile Dashboard** link (in the **Control Centers and Visualizations** section) to open the Workforce Profile Dashboard.
3. Set the global filter if needed (see Setting the Global Filter).
4. In the Key Metrics section, click the metric (% **Bachelors or Higher**, % **Published**, etc.) that you want to focus on.
5. In the Bar Graph section, select a **Look At** category (**Facilities**, **Departments**, etc.) to display a bar graph that shows how employees in the selected metric are distributed across the category that you selected. For example, if you select **Facilities**, each bar will represent a facility in your organization; each bar will display the number of students in that facility included in the metric that you selected in the Key Metrics section. If the category that you selected contains too many groups (subcategories) than will fit in the section, you can drag the box on the left-hand side of the section to scroll through all of the available subcategories.
6. If you want to filter the data further, click individual bars to select them. Only students who are part of the selected subcategories will be included in the Employee Population section. To deselect a selected bar, click it again.
7. If you want to filter the data that you will be downloading further, click a group in the Employee Population section (e.g., **Bachelors or Higher**, **Not Published**) to select it and include it in the download. To deselect a selected group, click it again. If one or more groups are selected, only students in the selected groups will be included in the download. If no groups are selected, all students (filtered by the global filter and the selections that you made in the section above) will be included in the download.
8. Click the table list and select the table that you want to download.



9. Click the download button [  DATA ].

10. When you are prompted to open or download the file, download it to your computer.

## THE GLOBAL FILTER

The global filter enables you to apply a filter to ALL sections of the Workforce Profile Dashboard, including the data download. If the data that the dashboard displays appears wrong, or not what you expected, check to see whether a global filter is being applied to the data.

## SAVING FILTER SETTINGS

To save the current global filter settings:

1. Click the saved filter management button  to open the saved filter panel.
2. Click the **Save New** button to open a text box.
3. Type a name for the saved filter in the text box.
4. Click the **Save** button to save the current global filter settings.

## SETTING THE GLOBAL FILTER

To set the global filter:

1. Click the **Adjust filters** button  to open the global filter page.
2. Select a date range, if needed. You can select a predefined range, like **Last 12 Months** or **Year to Date**), or you can define a custom date range by selecting dates in the To and from boxes.
3. Click a filter category (e.g., **Departments, Facilities**) to select it and display a list of subcategories.
4. Click filter subcategories (e.g., specific departments or facilities) to select them. To deselect a selected subcategory, click it again.
5. Click the **Close & Apply** link to save the filter settings and return to the dashboard.

## APPLYING SAVED FILTERS

To apply saved filter settings:

1. Click the saved filter management button  to open the saved filter panel.
2. Click the name of a saved filter to apply it.

## DELETING SAVED FILTERS

To delete saved filter settings:

1. Click the saved filter management button [  ] to open the saved filter panel.
2. Move your mouse cursor over the name of a saved filter to highlight it and display its delete button [  ].
3. Click the delete button.



# HealthStream Services

## ACCESSING HEALTHSTREAM INFORMATION

From the **Services** tab, you can access information available on the HealthStream web site.

### **To view HealthStream Information:**

1. Click **Course Library** to view the current courseware library.
2. Click **Products and Services** to access information about HealthStream products.
3. Click **About Us** for additional information about HealthStream.

## ACCESSING THE CUSTOMER COMMUNITY

The customer community is an online networking tool for administrators.

To access the customer community

### **Access the customer community in one of the following ways:**

- On the **Services** tab, click **Customer Community**.
- Click **Discuss** in the upper right-hand corner of any page.

**Note:** If prompted for a user ID and password, enter the same user ID and password you use to access the system. If you have trouble with access, please contact HealthStream Customer Support.

## USING BROWSER CHECK

If you experience problems navigating the system or if it is not running as expected, contact your support service. Your support representative may ask that you perform a system check on the computer you are using to help determine the cause of the problem.

### **To perform a system check:**

1. Go to <http://www.healthstream.com/browsercheck>. The browser check window appears.
2. Note features marked with a red **X**, as this indicates items for which the computer does not meet minimum requirements for the system to function properly.
3. Report all red **X** items to your HealthStream support service.

*Note:* The browser check may also be accessed by clicking **Check System Requirements** (if available) on the My Profile page.



# Institution Management

## INSTITUTION OVERVIEW

From the **Institution Management** section of the **Tools** tab, administrators can:

- Add and manage departments
- Add and manage job titles
- Manage job title mappings (to job categories)

**Note:** Manual changes made to using Institution Management functionality will be overridden by changes submitted via a data import file.

## DEPARTMENTS

A department is a sub-unit of an institution and designates the location where groups of employees work.

## ADDING A DEPARTMENT

 **To add a department:**

**Note:** It is not necessary to enter both a code and name. One or both will fulfill the data requirement for this page.

1. On the **Tools** tab, click **Add a Department**. The *Add a Department* page appears.
2. In the **Code** box, enter the department code.
3. In the **Name** box, enter the department name.
4. If you wish to include the department address, select the **Include Address Information** check box. The page will refresh, allowing you to enter address information.
5. Click **Save** or click **Save and Add Another** if you wish to add another department.

 **Tips**

- To avoid duplication, you may start by reviewing your current department listing by clicking **Manage Departments** and then adding a new department from there. While the system will not accept exact duplicates, slight variations in the department code or name would be accepted and may result in the same department having two records within the system (example: Code *0123-ER* and Code *123-ED* could be the same department duplicated in the system).

## SEARCHING FOR A DEPARTMENT

 **To search for a department:**

1. On the **Tools** tabs, click **Manage Departments**. The *Search Departments* page appears.
2. Enter a department code or name, or, to return a listing of all departments within the institution, leave both boxes blank.
3. Click **Search**. All departments meeting your search criteria will appear. Information columns include department code, department name, last updated, and by whom the department was last updated.

## EDITING A DEPARTMENT

-

### To edit a department:

1. Search for the department that you want to edit.
2. From the search results, click the name of the desired department. The *Edit a Department* page appears.
3. Edit department information or address information.
4. Click **Save** or click **Save and Add Another** if you wish to add another department. Any changes made to the department code or name will appear wherever the department is referenced (such as on student records).

## DELETING A DEPARTMENT

▶

### To delete a department:

1. Search for the department that you want to delete.
2. From the search results, click the name of the desired department. The *Edit a Department* page appears.
3. Click **Delete**. A confirmation prompt appears. **Note:** *Departments to which there are associations (students, student groups) cannot be deleted from the system; the **Delete** button will be disabled. All associations must be removed first. To view associations prior to attempting to delete a department, run the Department Utilization report. If courses or curricula were created at the department level, you may use the Course or Curriculum Ownership transfer feature to change ownership to from the department-level to the institution.*
4. Click **OK** to delete the department.

**Note:** *If a department is deleted, any course overrides that were created by override permission are also deleted. Also, courses previously published to the department (via Advanced Publishing) will be removed for the department being deleted.*

## JOB TITLES

A job title describes an employee's role within the institution. Job titles are mapped to job categories to group “like” job titles.

## ADDING A JOB TITLE

**To add a job title:**

**Note:** *It is not necessary to enter both a code and name. One or both will fulfill the data requirement for this page.*

1. On the **Tools** menu, click **Add a Job Title**. The *Add a Job Title* page appears.
2. Fill out the form. Required fields are marked with an asterisk (\*).
  - You may choose a job category to associate the new job title to, or you may perform that function when you map the job titles. The default is *Uncategorized*.
  - To make the new job title the default job title for new students, select the **Use this job title when importing or creating students** check box.
  - The **This job title provides Direct Patient Care** check box is used for Magnet designation/redesignation.
3. Click **Save** or click **Save and Add Another** if you wish to add another job title.

### ★ Tips

- To avoid duplication, you may start by reviewing your current job title listing by clicking **Manage Job Titles** from the **Tools** tab and then adding a new job title from there. While the system will not accept exact duplicates, slight variations in the job title code or name would be accepted and may result in the same job title having two records within the system (for example: Name-RN and Name-Registered Nurse result in one job title with two records).

## SEARCHING FOR A JOB TITLE

➡ **To search for a job title:**

1. On the **Tools** tab, click **Manage Job Titles**. The *Search Job Titles* page appears.
2. Enter a job title code, name, or select a job category from the list or, to return a listing of all job titles within the institution, leave both boxes blank and keep **All Job Categories** selected.
3. Click **Search**. All job titles meeting your search criteria will appear. Information columns include job title code, job title name, last updated, and by whom the job title was last updated.

## EDITING A JOB TITLE

➡ **To edit a job title:**

1. Search for the job title that you want to edit.

2. From the search results, click the name of the desired job title. The *Edit a Job Title* page appears.
3. Edit job title information.
4. Click **Save** or click **Save and Add Another** if you wish to add another job title. Any changes made to the job title code or name will appear wherever the job title is referenced (such as on student records).

## DELETING A JOB TITLE

### ➔ To delete a job title:

1. Search for the job title that you want to delete.
2. From the search results, click the name of the desired job title. The *Edit a Job Title* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the job title.

**Note:** Job titles to which there are associations (students, student groups) cannot be deleted from the system. All associations must first be removed.

## MAPPING JOB TITLES

Job title mapping assists with search capabilities by grouping similar job titles into one of several predefined job categories. Every job title should be mapped to an appropriate category. Take caution not to leave any job titles uncategorized.

### ➔ To map job titles to job categories:

1. On the **Tools** tab, click **Manage Job Title Mappings**. The *Manage Job Title Mappings* page displays.
2. From the list to the right of each job title code/name, select the appropriate job category.
3. Once all job titles are mapped to job categories, click **Save**.

## VIEWING UNCATEGORIZED JOB TITLES

It is recommended that job titles be checked on a regular basis to ensure that all are mapped to job categories.

### ➔ To view uncategorized job titles:

1. On the **Tools** tab, click **Manage Job Title Mappings**. The *Manage Job Title Mappings* page displays.
2. Click **Show Uncategorized**. Only those job titles that are not mapped will appear.
3. Map uncategorized job titles.
4. Click **Save**.

## CHANGING JOB TITLE MAPPING

### To change job title mapping:

1. On the **Tools** tab, click **Manage Job Title Mappings**. The *Manage Job Title Mappings* page displays.
2. Select a new job category from the list to the right of the job title code/name.
3. Click **Save**.

**Note:** *Changing a job title mapping will change related associations such as profile student groups that use job category as a profile criterion. Students with titles previously mapped to the selected category may no longer be part of the group if the job title mapping is changed. This may impact assignments that were made to the student group.*



# Learning Events

## LEARNING EVENTS OVERVIEW

Learning events are educational experiences that are not managed through the system that students have successfully completed. Learning events can be added to the system and appear on the student's transcript. They can be designated as satisfying existing system-managed courses, or can represent other, non system-managed learning events that the student has participated in, such as an off-site workshop or conference.

Learning event management is enabled for administrators only by default. An optional student-entered learning event feature can be enabled by request.

You can add two types of learning events: One that satisfies an in-system course and one that represents an outside course.

## ADDING A LEARNING EVENT THAT SATISFIES A COURSE

There are special rules for adding a learning event to bridge a course in an MOC curriculum. See [MOC Course Completions from Other Sources \(Bridging\)](#).

### To add the learning event:

1. On the **Education** tab, click **Add a Learning Event**. The *Add a Learning Event* page displays.
2. Click **Search for the course this Learning Event satisfies**. The *Browse for a Course* page appears.
3. Search for the course you wish to satisfy using a learning event. All courses matching the search criteria will appear. **Note:** *If a course appears in the search results for manage courses but does not appear here, it may be due to a course publish setting. Administrators who publish courses have the option of disallowing the course to be associated to a learning event.*
4. Click the name link of the desired course. You are returned to the *Add a Learning Event* page with the selected course name appearing in the **Course Name** box.
5. In the **Course Identifier** box, enter an optional course identifier.
6. In the **Completion Date** box, enter the learning event completion date. The completion date can be today's date or another date in the past.
7. The **Estimated Completion Time** field is populated with the total estimated completion time of the course's learning activities.
8. If the selected course has associated CE credit and the CE was entered to specifically allow credit to be issued for a learning event, the option to specific CE credit will appear. Otherwise the **Associated CE Credit** section will display that the course has no CE Credit.

9. In the **Comments** box, enter optional comments.
10. If you want to unenroll any students who have started, but not yet finished, the course, select the **Unenroll Students In Progress** check box. When prompted to confirm the selection, click **OK**. Selecting this option is permanent: you will not be able to clear the check box after you save the learning activity.
11. Click **Add Students**. The *Other Learning Event Management – Select Students to Include* page appears.
12. Search for students using basic or advanced search criteria. All students matching the search criteria will be displayed.
13. Select the check box to the left of the students' names you want to include, or click **Select All Current Search Results** to select all students returned in the search.
14. Click **Continue**. A listing of selected students appears at the bottom of the page. Students are marked as *Attended* with a score of 0.
15. Select the corresponding box in the **Remove** column for each student that you want to remove.
16. Click **Add Students** if you want to add more students. Refer to steps 10 through 13.
17. After you have added and scored (if appropriate) all students, click **Save**. The learning event will now appear on the selected students' transcripts. Consider the following when a learning event satisfies an assigned course:
  - To save the learning event and copy it in a single step, click the **Save and Copy** link. The copy will be created as soon as you click the link; you can then make edits and save the copy as a new learning event.
  - A learning event can satisfy a not-yet-due course assignment (one-time assignment or recurring assignment).
  - A learning event can satisfy a past due course assignment (one-time assignment or recurring assignment based on previous completion date).
  - A learning event can satisfy a delinquent course assignment, as long as the learning event completion date was prior to the course assignment becoming delinquent. The student's completion status will be changed from *Delinquent* to either *Completed on Time* or *Completed Late*, depending on the learning event completion date.
  - A learning event can satisfy an upcoming instance of a recurring assignment, even if that instance does not yet appear on the student's *My Learning* page.
  - A learning event may satisfy course completion for a course within a curriculum or an equivalent.
  - If a new active date is applied to a student's record, it may change assignment due dates and may therefore affect learning event assignment satisfactions.
  - Editing and deleting learning events, or removing students from them, can also have an impact on course assignments, curricula, and equivalents.

**Note:** A learning event cannot satisfy an elective course unless the course is part of a curriculum or equivalent.

## ★ Tips

- You can click [  ] to select the date.

## UNENROLLING STUDENTS FROM A COURSE SATISFIED BY A LEARNING EVENT

When you add a learning event that satisfies an HLC course, there may be students who have already started, but not yet completed, the course. If you add any of these students to the list of learning event attendees, the default system behavior is to move the course from the **Assigned Learning** section to the **Elective Learning** section of their *My Learning* page, where it will remain until the student or an administrator deletes it.

You can, however, automatically unenroll any students who are currently in the process of taking the course by selecting the **Unenroll Students In Progress** check box on the learning event management page. When you select this option and save the learning event, any students in the learning event attendee list who are currently taking the course will be unenrolled, and the course will be removed from their *My Learning* page.

If you select the **Unenroll Students In Progress** check box, please be aware that this action cannot be undone. After you save the learning event, the check box will no longer be editable. The only way to re-enroll a student in the course is to clear the **Completed** check box next to the student's name in the learning event attendee list and save the learning event. The course will reappear on the student's *My Learning* page, but all progress he or she might have made before it was removed will be lost.

## ADDING A LEARNING EVENT THAT REPRESENTS AN OUTSIDE COURSE

### ➔ To add the learning event:

1. On the **Education** tab, click **Add a Learning Event**. The *Add a Learning Event* page displays.
2. Click **Enter general information for a non-HLC course Learning Event**. The *Add a Learning Event* page refreshes and displays the following information, as shown below.
3. In the **Course Name** box, enter the course name.
4. In the **Default Certificate** list, click the certificate you want to use with this course. **Note:** Choose either the default, or a default certificate you have designed for outside learning events. Choose a CE certificate only if you are certain that doing so is in compliance with CE accreditation/approval guidelines. You may create a learning event certificate template if you wish to capture CE credit earned from a learning event onto a student's transcript.
5. In the **Course Identifier** box, enter an optional course identifier.
6. In the **Completion Date** box, enter the learning event completion date. The completion date can be today's date or another date in the past.
7. In the **Estimated Completion Time** boxes, enter the number of hours and minutes, or select the desired value. The estimated time can be included on transcripts and is factored into the Training Hours Summary report.

8. Click **Add CE Credit to the Course** to associate CE credit, if compliant with CE accreditation/approval guidelines. The page refreshes, allowing for the selection of accreditation/approval.
9. In the **Credit Units** box, enter the number of credit units a student will earn for this course.
10. Select the **Show Certificate** check box if you want to display the CE certificate on the student's *My Transcript* page.
11. Click **Save Credit**. The page refreshes with the accreditation/approval now displayed.
12. In the **Comments** box, enter any additional comments, if desired.
13. Click **Add Students**. The *Other Learning Event Management – Select Students to Include* page appears.
14. Search for students using basic or advanced search criteria. All students matching the search criteria will be displayed.
15. Select the check box to the left of the students' names you want to include, or click *Select All Current Search Results* to select all students returned in the search.
16. Click **Continue**. A listing of the selected students appears at the bottom of the page. Students are marked as *Attended* with a score of 0. If a score was earned for the learning activity, that score can be entered in place of the 0.
17. Click the corresponding box in the **Remove** column for each student that you want to remove.
18. Click **Add Students** if you want to add more students. Refer to steps 11 through 14.
19. After you have added and scores (if appropriate) all students, click **Save**.
  - To save the learning event and copy it in a single step, click the **Save and Copy** link. The copy will be created as soon as you click the link, so you can begin making edits immediately.

★ **Tips**

- You can click [  ] to select the date.

## SEARCHING FOR A LEARNING EVENT

➡ **To search for a learning event:**

1. On the **Education** tab, click **Manage Learning Events**. The *Other Learning Event Management* page appears.
2. Enter the desired search criteria.
3. Click **Search**. A list appears of all learning events matching the search criteria, along with details about the learning event.

## EDITING A LEARNING EVENT

### To edit a learning event:

1. Search for the learning event that you want to edit.
2. From the search results, click the name of the desired learning event. The *Edit a Learning Event* page appears.
3. Edit learning event information and add or remove students. **Note:** *For learning events associated with a course, editing the completion date, removing one or more students, or deleting the learning event will re-evaluate any curricula, equivalents, and assignments associated to that course completion. This can result in any of these learning items moving from a student's transcript back to the My Learning page.*
4. Click **Save**.
  - To save the learning event and copy it in a single step, click the **Save and Copy** link. The copy will be created as soon as you click the link, so you can begin making edits immediately.

## COPYING A LEARNING EVENT

Copying a learning event enables you to use an existing learning event as a template for others.

### To copy a learning event:

1. From the **Education** tab, click the **Manage Learning Events** link to open the *Learning Event Management* page.
2. Search for the learning event you want to copy.
3. From the search results list, click a learning event name to open the *Edit a Learning Event* page.
4. Click the **Copy** link at the bottom of the page to create a copy of the learning event.
5. Edit the learning event.
  - To change the course association, click the **Select an HLC course** or **Enter information for a non-HLC course** link. If you are copying a learning event that satisfies a non-HLC course, the **Enter information for a non-HLC course** link is disabled; you can type the information in the **Course Name** box.
  - After selecting a course association, you can edit other information, such as the default certificate and CE credit, as you would when editing any learning event.
  - To remove a student from the learning event, select the check box in the **Remove** column (select the **Select all** check box to remove all the students). The student will be removed from the learning event when it is saved.
6. Click **Save**.
  - To save the learning event and copy it in a single step, click the **Save and Copy** link. The copy will be created as soon as you click the link; you can then make edits and save the copy as a new learning event.

## DELETING A LEARNING EVENT

### To delete a learning event:

1. Search for the learning event that you want to edit.
2. From the search results, click the name of the desired learning event. The *Edit a Learning Event* page appears.
3. Click **Delete**. A confirmation prompt appears.
4. Click **OK** to delete the learning event.

**Note:** If a learning event satisfied a previous assignment, once that learning event is deleted, the student will return to the appropriate status for the assigned course, equivalent, or curriculum (Not Yet Due, Past Due, or Delinquent) based on the assignment due date.

**Note:** For learning events associated with a course, editing the completion date, removing one or more students, or deleting the learning event will re-evaluate any curricula, equivalents, and assignments associated to that course completion. This can result in any of these learning items moving from a student's transcript back to the My Learning page.

## CAPTURING CE CREDIT FOR AN OUTSIDE LEARNING EVENT

CE credit that is received by students from another accredited/approved provider for an outside learning event can be added to the student's transcript. To do so, the administrator must create a generic CE accreditation/approval to associate with outside learning events.

This process simply provides a placeholder for indicating that CE credit was earned for the learning event. Do not replicate the accredited/approved provider status of the issuing provider, and do not associate credit from one of your actual accreditation or approval statuses.

**Note:** CE credit awarded for outside learning events will not be differentiated from credit issued in-house on student transcripts or other reports.

### To capture CE credit for an outside learning event:

1. Create a certificate template titled *Outside Learning Event*. Suggested verbiage: *This is a placeholder certificate for an outside learning event and does not replicate or replace the originally-issued certificate awarded by the accredited/approved provider of the learning event.*
2. Create a course provider called *Outside Learning Event Course Provider*.
3. Create an accrediting/approving body called *Outside Learning Event Accrediting/Approving Body*. Suggested verbiage for Credit Unit Display Name field: *See original certificate.*
4. Create an accredited/approved provider by linking the *Outside Learning Event* certificate template, course provider, and accrediting/approving body. When creating the accredited/approved provider, select the **Allow credit when completion occurs from a Learning Event** check box. This step will make the learning event accreditation available when entering a new learning event.
5. Add the learning event.

6. Click **Add CE Credit to the Course**. A list of all accredited/approved providers that allow CE credit for a learning activity appears (those for which the **Allow credit when completion occurs from a learning event** check box has been selected).
7. Select the accredited provider.
8. Enter the number of credit units earned.
9. Select the **Show Certificate** check box if you wish students to see the generic learning event certificate on their transcript. **Note:** *It is not necessary to add a course level accreditation statement for an outside learning event.*
10. Click **Save Credit**.



# Maintenance of Competency

## MAINTENANCE OF COMPETENCY (MOC) CURRICULA

Skills and knowledge that are not used regularly degrade over time. Maintenance of Competency (MOC) curricula deliver regular, distributed learning (courses and/or equivalents), repeated over time to help students reinforce the skills and knowledge necessary to maintain their competency in an area of practice.. The curriculum schedule specifies the order and time period in which courses and/or equivalents must be completed.

When students launch an MOC curriculum, they are taken to an MOC curriculum details page, which displays their currently assigned learning on the **To Do** tab.

My Learning | My Assessments | My Transcript | Catalog | Inservice Center | My Profile

MOC Curriculum Details  
MOC - HeartCode BLS

Curriculum Overview | Exit Curriculum

**On Track**  
Complete your To Do list by 03/02/2014 to stay current.

To Do | Full Schedule

Learning Schedule 1: 12/03/2013 - 03/02/2014

Course Name	Est. Length	Status	Due	
HeartCode® BLS Parts 2 and 3 - G-2010	35 min	Not Yet Started	3/2/2014	Enroll
HeartCode® BLS Part 1 - G-2010	96 min	Not Yet Started	12/2/2014	Enroll

**HealthStream®**

Administrators can add links and details on the *MOC Curriculum Properties* page, which students see here.

Note the custom logo above--you can add an image from the *MOC Curriculum Properties* page.

**Legend:**  
Online | Evaluation | MOC Curriculum | Expand List | Collapse List

The **Full Schedule** tab displays all the items included the curriculum, and the schedule period in which they are due.

My Learning | My Assessments | My Transcript | Catalog | Inservice Center | My Profile

**MOC Curriculum Details**  
**MOC - HeartCode BLS**

Curriculum Overview Exit Curriculum

**On Track**  
Complete your To Do list by 03/02/2014 to stay current.

To Do | **Full Schedule**

Year 1: 12/03/2013 - 12/02/2014			In Progress
Course Name	Est. Length	Status	
<a href="#">HeartCode® BLS Part 1 - G-2010</a>	96 min	Not Yet Started	<input type="button" value="Enroll"/>
Q1: 12/03/2013 - 03/02/2014			In Progress
Course Name	Est. Length	Status	
<a href="#">HeartCode® BLS Parts 2 and 3 - G-2010</a>	35 min	Not Yet Started	<input type="button" value="Enroll"/>
Q2: 03/03/2014 - 06/02/2014			Available: 06/02/2014
Course Name	Est. Length	Status	
BLS Lecture	180 min	Not Yet Available	
Q3: 06/03/2014 - 09/02/2014			Available: 09/02/2014
Q4: 09/03/2014 - 12/02/2014			Available: 12/02/2014
Year 2: 12/03/2014 - 12/02/2015			Available: 12/02/2015
Q5: 12/03/2014 - 03/02/2015			Available: 03/02/2015
Q6: 03/03/2015 - 06/02/2015			Available: 06/02/2015
Q7: 06/03/2015 - 09/02/2015			Available: 09/02/2015
Q8: 09/03/2015 - 12/02/2015			Available: 12/02/2015

**Legend:**  
 Online Evaluation MOC Curriculum Expand Schedule Collapse Schedule

**HealthStream®**

Administrators can add links and details on the *MOC Curriculum Properties* page, which students see here.

Note the custom logo above--you can add an image from the *MOC Curriculum Properties* page.

Students cannot start a course or equivalent until its schedule period has arrived. Learning that is not completed on time will be carried over to the next period. Students must complete the overdue learning first.

**When you assign an MOC curriculum, the due date must equal the start date plus the main curriculum schedule period. For example, if you assign an MOC curriculum with a two-year schedule, and the assignment start date is 12/4/2013, then the due date must be 12/3/2015.**

An MOC curriculum can be associated with one or more professional certifications. Students who are assigned an MOC curriculum, and who hold a certification that is associated with the curriculum, will have their certification expiration date extended when they complete the assigned learning in a schedule period. See [MOC Curricula and Certifications](#) for more information about this feature.

The [MOC Progress](#) report enables you to track student progress in MOC curricula.

## MOC CURRICULUM SCHEDULES

An MOC curriculum schedule specifies the order and time period in which courses and/or equivalents must be completed; it can contain multiple assignment periods. For example, imagine that you need a curriculum that will deliver learning related to a certification that needs to be renewed every two years. The learning that you want students to complete consists of

- **course A:** an online course to test students' knowledge, to be completed once per year;
- **course B:** a practical skills check, to be completed in alternating quarters;
- **course C:** a classroom learning activity, to be completed in alternating quarters when course B is not required.

In the example described above, the main curriculum schedule would be a single period of two years (the certification's renewal period); it would contain two one-year assignment periods (for course A) and eight three-month periods (for courses B and C).



Schedule structure for the MOC curriculum described above

When you create an MOC curriculum, you select a schedule from a list. The schedule name describes the main schedule period and the assignment periods that it contains. In the case of our example curriculum, the schedule's name would be *2 Years - Every 3 months and 12 months*. You cannot create an MOC curriculum schedule. If none of the options in the list fits your needs, contact your HealthStream representative to have one created for you.

**When you assign an MOC curriculum, the due date must equal the start date plus the main curriculum schedule period. For example, if you assign an MOC curriculum with a two-year schedule, and the assignment start date is 12/4/2013, then the due date must be 12/3/2015.**

Selecting a schedule displays the scheduling grid. The scheduling grid is made up of panels; each panel corresponds to an assignment period. The *2 Years - Every 3 months and 12 months* scheduling grid looks like this.

**Selected Learning Schedule:** 2 Years - Every 3 months and 12 months

Year 1: 12 months

Q1: 3 months

Q2: 3 months

Q3: 3 months

Q4: 3 months

Year 2: 12 months

Q5: 3 months

Q6: 3 months

Q7: 3 months

Q8: 3 months

When adding items to the scheduling grid, keep the following things in mind:

- If only part of the course or equivalent name is visible, move your mouse cursor over it to see the full name in a tooltip.



**Selected Learning Schedule:** 2 Years - Every 3 months and 12 mo

**Available Courses:**  
(drag and drop course to desired schedule on the right)

Year 1: 12 months

HeartCode® BLS...  
HeartCode® BLS Part 1 - G-2010 (Low Bandwidth)

Q1: 3 months    Q2: 3 months    Q3: 3 months    Q4: 3 m

- You can add more than one course or equivalent to an assignment period panel. For panels with more than one item, the items must be completed in the order they appear in the schedule panel, from top to bottom.

**Maintenance of Competency (MOC) Curriculum Builder**  
**MOC - HeartCode BLS**  
 Version: 2 -- ACME HealthCare Enterprise

**Selected Learning Schedule:** 2 Years - Every 3 months and 12 months

**Available Courses:**  
 (drag and drop course to desired schedule on the right)

Year 1: 12 months

HeartCode® BLS... ← **Must be completed first**

BLS Instructor...

- You cannot add a course or equivalent to a schedule panel if it already contains that course or equivalent.

Any course or equivalent that you add to a panel will be made available to students when the corresponding assignment period begins, and must be completed by the end of the period, and in the given order, top to bottom. Learning that is not completed on time will be carried over to the next period. Students must complete the overdue learning first.

## MOC CURRICULA AND CERTIFICATIONS

MOC curricula can be associated with professional certifications. Students who hold a valid certification associated with an MOC curriculum will have their certification expiration date extended when they complete all of the learning that was assigned in a curriculum assignment period. The length of the extension is the same as the assignment period. For example, if a student with an unexpired American Heart Association (AHA) Basic Life Support (BLS) certification completes all of the learning assigned in a three-month assignment period of an MOC curriculum associated with the BLS certification, his BLS certification will be extended by three months. A student's certification must be system-managed to enable automatic expiration date extension.

**Only HealthStream personnel can associate certifications with an MOC curriculum.**

If you assign an MOC curriculum that is associated with a certification to students who do not hold that certification, they will not be able to access the learning in the curriculum. If a student contacts you with this problem, make sure that the appropriate certification information is entered correctly in the system, and is system-managed.

My Learning
My Assessments
My Transcript
Catalog
Inservice Center
My Profile


**MOC Curriculum Details**  
**BLS Certificate MOC Curriculum**

 [Curriculum Overview](#)
 [Exit Curriculum](#)


**Missing Certification**  
 Your BLS - Basic Life Support certification is missing or not managed by the system. Please contact your administrator to proceed.

To Do

Full Schedule

Learning Schedule 1: 12/11/2013 - 03/10/2014				
Course Name	Est. Length	Status	Due	
<input type="checkbox"/> HeartCode® BLS Parts 2 and 3 - G-2010	35 min	Not Yet Started	3/10/2014	<input type="button" value="Enroll"/>
<input type="checkbox"/> HeartCode® BLS Part 1 - G-2010	96 min	Not Yet Started	12/10/2014	<input type="button" value="Enroll"/>

**Your Certification Information:**  
 Your BLS - Basic Life Support certification is missing.  
[Manage your certifications](#)

**Legend:**  
 Online
  Evaluation
  MOC Curriculum
  Expand List
  Collapse List

This student was assigned an MOC curriculum associated with the AHA BLS certification. Either he does not hold the BLS certification, or it is not in (and managed by) the system .

## MOC CURRICULUM PROPERTIES

Required fields are marked with an asterisk (\*).

**Name** - the name of the MOC curriculum, which will appear on students' *My Learning*, *MOC Curriculum Details*, and *MOC Curriculum Overview* pages.

**Description** - a description of the MOC curriculum, which will appear on the *MOC Curriculum Overview* page.

**Default Categories** - assigning one or more categories to a curriculum helps users find it with the search by category feature.

To assign categories to a curriculum:

1. Click the **Select Categories** link to open the *Category Selection* page.
2. Select the check box next to the category or categories that you want to assign to the curriculum.
  - You can click the expand button [+] next to a category to expand it and see its subcategories.
3. Click the **Select** button to select the category or categories and return to the previous page.

- To remove a selected category, clear the check box next to it. When you save your changes to the *MOC Curriculum Properties* page, the category will be removed.

**Default Certificate** - the certificate that students can view and print from their *My Transcript* page. Select a certificate from the list.

**Keywords** - typing keywords in the **Keywords** box helps users find the curriculum with the search by keyword feature. If you enter more than one keyword, separate them with commas.

**Development Status** - the Development Status flag indicates the curriculum's place in the development workflow. Select a status from the list.

**Additional Curriculum Image** - you can upload an image that students will see on the *MOC Curriculum Details* page. The width of the image must not exceed 265 px.

To upload an image:

1. Click the **Browse** button to open a *Choose File to Upload* dialog box.
2. Navigate to the file you want to upload.
3. Click the file to select it.
4. Click the **Open** button to close the dialog and return to the previous page.

**Video Link** - you can provide students with a link to a video by typing a URL in the **Video Link** box. The URL must begin with *http://* or *https://*. Students will see the link on the *MOC Curriculum Details* page. The video will only appear the first time a student accesses the curriculum; students can close the video without watching it.

**Additional Details/Links** - if you would like to provide students with additional information or links to other resources, type them in the **Additional Details/Links** box. Students will see them on the *MOC Curriculum Details* page.

## CREATING A NEW MOC CURRICULUM

 To create a new MOC curriculum:

1. From the **Courses** tab, click the **Add an MOC Curriculum** link to open the *Add a Maintenance of Competency (MOC) Curriculum* page.
2. Enter the curriculum properties on the *Add a Maintenance of Competency (MOC) Curriculum* page. Required fields are marked with an asterisk (\*).

**Name** - the name of the MOC curriculum, which will appear on students' *My Learning*, *MOC Curriculum Details*, and *MOC Curriculum Overview* pages.

**Description** - a description of the MOC curriculum, which will appear on the *MOC Curriculum Overview* page.

**Default Categories** - assigning one or more categories to a curriculum helps users find it with the search by category feature.

To assign categories to a curriculum:

1. Click the **Select Categories** link to open the *Category Selection* page.
2. Select the check box next to the category or categories that you want to assign to the curriculum.
  - You can click the expand button [+] next to a category to expand it and see its subcategories.
3. Click the **Select** button to select the category or categories and return to the previous page.
  - To remove a selected category, clear the check box next to it. When you save your changes to the *MOC Curriculum Properties* page, the category will be removed.

**Default Certificate** - the certificate that students can view and print from their *My Transcript* page. Select a certificate from the list.

**Keywords** - typing keywords in the **Keywords** box helps users find the curriculum with the search by keyword feature. If you enter more than one keyword, separate them with commas.

**Development Status** - the Development Status flag indicates the curriculum's place in the development workflow. Select a status from the list.

**Additional Curriculum Image** - you can upload an image that students will see on the *MOC Curriculum Details* page. The width of the image must not exceed 265 px.

To upload an image:

1. Click the **Browse** button to open a *Choose File to Upload* dialog box.
2. Navigate to the file you want to upload.
3. Click the file to select it.

- Click the **Open** button to close the dialog and return to the previous page.

**Video Link** - you can provide students with a link to a video by typing a URL in the **Video Link** box. The URL must begin with *http://* or *https://*. Students will see the link on the *MOC Curriculum Details* page. The video will only appear the first time a student accesses the curriculum; students can close the video without watching it.

**Additional Details/Links** - if you would like to provide students with additional information or links to other resources, type them in the **Additional Details/Links** box. Students will see them on the *MOC Curriculum Details* page.

- Click the **Save** button to proceed to the Curriculum Builder.
- Click the **click here** link to display the schedule and course/evaluation selection page.
- Select an option from the **Select a Learning Schedule** list to display the scheduling grid.

People Courses Assessments Education Reports Tools Services My Profile Welcome

Maintenance of Competency (MOC) Curriculum Builder  
MOC - HeartCode BLS  
Version: 1 -- ACME HealthCare Enterprise

Return to Curriculum Builder

Select a Learning Schedule: 2 Years - Every 3 months and 12 months

**Available Courses:**  
(drag and drop course to desired schedule on the right)

Year 1: 12 months

Q1: 3 months Q2: 3 months Q3: 3 months Q4: 3 months

Year 2: 12 months

Q5: 3 months Q6: 3 months Q7: 3 months Q8: 3 months

**Schedule Description:**  
This schedule has 8 quarters and 2 year learning schedules.

**Add to this MOC Curriculum**  
[Add a Course](#)  
[Add an Equivalent](#)

Save Cancel

A two-year learning schedule with one-year and one-quarter assignment periods.

When you assign an MOC curriculum, the due date must equal the start date plus the main curriculum schedule period. For example, if you assign an MOC curriculum with a two-year schedule, and the assignment start date is 12/4/2013, then the due date must be 12/3/2015.

6. Add courses and/or equivalents.
  - 6.1. Click the **Add a Course** or **Add an Equivalent** link to open the *Browse for a Course* or *Browse for an Equivalent* page.
  - 6.2. Search for a course or equivalent to add to the curriculum. You can search by keyword, by category, or alphabetically.
  - 6.3. Click an item name from the search results to open a description of the course or equivalent.
  - 6.4. Click the **Save** button to add the item to the curriculum and return to the Curriculum Builder, or click **Save and Add Another** to add the item to the curriculum and return to the *Browse for a Course* (or *Browse for an Equivalent*) page.
    - Selected courses and equivalents appear in the **Available Courses** panel on the Curriculum Builder.
  - 6.5. Continue until you have selected all the courses and equivalents that you need.
    - If students need to take single course or equivalent more than once, you must search for and select the course or equivalent as many times as it will be appear in the curriculum. For example, if students need to complete the same course every other quarter over a two-year period, you must search for and select that course four times.
7. Drag and drop the courses or equivalents from the **Available Courses** panel to the appropriate assignment period panel in the scheduling grid.
  - If only part of the course or equivalent name is visible, move your mouse cursor over it to see the full name in a tooltip.

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**Maintenance of Competency (MOC) Curriculum Builder**  
**MOC - HeartCode BLS**  
Version: 2 -- ACME HealthCare Enterprise

**Selected Learning Schedule:** 2 Years - Every 3 months and 12 mo

**Available Courses:**  
(drag and drop course to desired schedule on the right)

Year 1: 12 months

HeartCode® BLS...

HeartCode® BLS Part 1 - G-2010 (Low Bandwidth)

Q1: 3 months

Q2: 3 months

Q3: 3 months

Q4: 3 m

- You can add more than one course or equivalent to an assignment period panel. For panels with more than one item, the items must be completed in the order they appear in the schedule panel, from top to bottom.

**Maintenance of Competency (MOC) Curriculum Builder**  
**MOC - HeartCode BLS**  
 Version: 2 -- ACME HealthCare Enterprise

**Selected Learning Schedule:** 2 Years - Every 3 months and 12 months

**Available Courses:**  
 (drag and drop course to desired schedule on the right)

Year 1: 12 months

HeartCode® BLS... ← **Must be completed first**

BLS Instructor...

- You cannot add a course or equivalent to a schedule panel if it already contains that course or equivalent.
- If necessary, you can remove a course or equivalent from the Curriculum Builder.
    - Click the item's name link to open its detail page.
    - Click the **Delete** link.
    - When prompted to confirm the deletion, click **OK** to delete the course or equivalent and return to the Curriculum Builder.
  - Click the **Save** button to save your progress.

When you have set the schedule, you can click the **Return to Curriculum Builder** link at the top of the page to return to the Curriculum Builder main page. From there, you can

- manage the schedule;
- [manage the curriculum properties](#);
- [manage curriculum versions](#);
- [publish the curriculum](#) (you can publish the curriculum **ONLY** if every schedule panel contains at least one item and there are no courses in the **Available Courses** panel).

## COPYING MOC CURRICULA

The original curriculum's schedule, courses, and certifications are copied to the new curriculum.

➔ **To copy an MOC curriculum:**

1. From the **Courses** tab, click the **Manage Curricula** link to open the *Browse for a Curriculum* page.
2. Search for the curriculum that you want to copy. You can search by keyword, by category, or alphabetically.
3. From the search results, click a curriculum name to open the Curriculum builder.
4. Click the **Copy MOC Curriculum** link at the top of the page.
5. When prompted to confirm the operation, click **OK** to copy the curriculum and open its *MOC Curriculum Properties* page.
  - The word *COPY* is added to the curriculum name to indicate that you are working with a copy.
6. Make any necessary edits.
7. Click the **Save** button at the bottom of the page to save your changes and open the Curriculum Builder.

## EDITING MOC CURRICULA PROPERTIES

After editing an MOC curriculum's properties, you must [republish](#) the curriculum for the changes to take effect.

➔ **To edit an MOC curriculum's properties:**

1. From the **Courses** tab, click the **Manage Curricula** link to open the *Browse for a Curriculum* page.
2. Search for the curriculum that you want to copy. You can search by keyword, by category, or alphabetically.
3. From the search results, click a curriculum name to open the Curriculum builder.
4. Click the **Manage Properties** link (on the right-hand side of the page) to open the *MOC Curriculum Properties* page.
5. Edit the properties as needed:

**Name** - the name of the MOC curriculum, which will appear on students' *My Learning*, *MOC Curriculum Details*, and *MOC Curriculum Overview* pages.

**Description** - a description of the MOC curriculum, which will appear on the *MOC Curriculum Overview* page.

**Default Categories** - assigning one or more categories to a curriculum helps users find it with the search by category feature.

To assign categories to a curriculum:

1. Click the **Select Categories** link to open the *Category Selection* page.
2. Select the check box next to the category or categories that you want to assign to the curriculum.
  - You can click the expand button [+] next to a category to expand it and see its subcategories.
3. Click the **Select** button to select the category or categories and return to the previous page.
  - To remove a selected category, clear the check box next to it. When you save your changes to the *MOC Curriculum Properties* page, the category will be removed.

**Default Certificate** - the certificate that students can view and print from their *My Transcript* page. Select a certificate from the list.

**Keywords** - typing keywords in the **Keywords** box helps users find the curriculum with the search by keyword feature. If you enter more than one keyword, separate them with commas.

**Development Status** - the Development Status flag indicates the curriculum's place in the development workflow. Select a status from the list.

**Additional Curriculum Image** - you can upload an image that students will see on the *MOC Curriculum Details* page. The width of the image must not exceed 265 px.

To upload an image:

1. Click the **Browse** button to open a *Choose File to Upload* dialog box.
2. Navigate to the file you want to upload.
3. Click the file to select it.
4. Click the **Open** button to close the dialog and return to the previous page.

**Video Link** - you can provide students with a link to a video by typing a URL in the **Video Link** box. The URL must begin with *http://* or *https://*. Students will see the link on the *MOC Curriculum Details* page. The video will only appear the first time a student accesses the curriculum; students can close the video without watching it.

**Additional Details/Links** - if you would like to provide students with additional information or links to other resources, type them in the **Additional Details/Links** box. Students will see them on the *MOC Curriculum Details* page.

5. Click the **Save** button to save your changes.

## EDITING AN MOC CURRICULUM SCHEDULE

If the MOC curriculum whose schedule you want to edit has been published, you must create a new version of the curriculum first. If the curriculum is associated with a certification, the schedule period **MUST** be the same as the certification period. After you edit the schedule, you must republish the curriculum for the changes to take effect.

### ➡ To edit an MOC curriculum schedule:

1. From the **Courses** tab, click the **Manage Curricula** link to open the *Browse for a Curriculum* page.
2. Search for the curriculum that you want to copy. You can search by keyword, by category, or alphabetically.
3. From the search results, click a curriculum name to open the Curriculum builder.
4. Click the **Manage Schedule** link (on the right-hand side of the page) to make the schedule editable.
5. Select an option from the **Select a Learning Schedule** list to display the scheduling grid.

The screenshot shows the 'Maintenance of Competency (MOC) Curriculum Builder' interface. At the top, there is a navigation bar with tabs: People, Courses, Assessments, Education, Reports, Tools, Services, and My Profile. A 'Welcome' message is visible on the right. The main content area is titled 'MOC - HeartCode BLS' with 'Version: 1 -- ACME HealthCare Enterprise'. A 'Return to Curriculum Builder' link is in the top right. Below the title, there is a 'Select a Learning Schedule:' dropdown menu set to '2 Years - Every 3 months and 12 months'. On the left, an 'Available Courses:' section contains a placeholder for dragging and dropping courses. The main area displays a scheduling grid for two years. Year 1 consists of a 12-month block followed by four 3-month blocks labeled Q1, Q2, Q3, and Q4. Year 2 consists of another 12-month block followed by four 3-month blocks labeled Q5, Q6, Q7, and Q8. On the right, a 'Schedule Description:' box states 'This schedule has 8 quarters and 2 year learning schedules.' Below this is a box titled 'Add to this MOC Curriculum' with 'Add a Course' and 'Add an Equivalent' links. At the bottom left, there are 'Save' and 'Cancel' buttons.

**A two-year learning schedule with one-year and one-quarter assignment periods.**

- This is only available if the curriculum has not been published, and is the first version. Otherwise, the schedule cannot be changed: only the courses and/or learning events can be edited.

**When you assign an MOC curriculum, the due date must equal the start date plus the main curriculum schedule period. For example, if you assign an MOC curriculum with a two-year schedule, and the assignment start date is 12/4/2013, then the due date must be 12/3/2015.**

6. Add courses and/or equivalents.
  - 6.1. Click the **Add a Course** or **Add an Equivalent** link to open the *Browse for a Course* or *Browse for an Equivalent* page.
  - 6.2. Search for a course or equivalent to add to the curriculum. You can search by keyword, by category, or alphabetically.
  - 6.3. Click an item name from the search results to open a description of the course or equivalent.
  - 6.4. Click the **Save** button to add the item to the curriculum and return to the Curriculum Builder, or click **Save and Add Another** to add the item to the curriculum and return to the *Browse for a Course* (or *Browse for an Equivalent*) page.
    - Selected courses and equivalents appear in the **Available Courses** panel on the Curriculum Builder.
  - 6.5. Continue until you have selected all the courses and equivalents that you need.
    - If students need to take single course or equivalent more than once, you must search for and select the course or equivalent as many times as it will be appear in the curriculum. For example, if students need to complete the same course every other quarter over a two-year period, you must search for and select that course four times.
7. Drag and drop the courses or equivalents from the **Available Courses** panel to the appropriate assignment period panel in the scheduling grid.
  - If only part of the course or equivalent name is visible, move your mouse cursor over it to see the full name in a tooltip.

- You can add more than one course or equivalent to an assignment period panel. For panels with more than one item, the items must be completed in the order they appear in the schedule panel, from top to bottom.

- You cannot add a course or equivalent to a schedule panel if it already contains that course or equivalent.
8. If necessary, you can remove a course or equivalent from the Curriculum Builder.
    - 8.1. Click the item's name link to open its detail page.
    - 8.2. Click the **Delete** link.
    - 8.3. When prompted to confirm the deletion, click **OK** to delete the course or equivalent and return to the Curriculum Builder.
  9. Click the **Save** button to save your progress.

## MOC COURSE COMPLETIONS FROM OTHER SOURCES (BRIDGING)

It is possible for a student to receive MOC course completion credit from a learning event or a course completion from another assignment (see Learning Events Overview). Sometimes this is called *bridging* the course in the MOC curriculum.

To bridge a course in an MOC curriculum, the learning event (or course from another assignment) completion date must be *after* the completion date of the course that precedes the bridged course and after the start date of its assigned learning schedule. The learning event/other course completion date must also fall *before* the completion date of the course that follows the bridged course. If the course to be bridged is the first course in the MOC curriculum, the learning event/other completion date must be equal to or after the MOC curriculum start date.

If an MOC course is bridged, and you edit the learning event/other course completion date so that it falls outside of the range described above, the MOC course will no longer be bridged, and the student will have to complete it. If the course was part of a learning schedule that advanced a certification expiration date (see MOC Curricula and Certifications), it will be rolled back a period of time equal to the length of the learning schedule that contained the course. If there are completed learning schedules after this one giving an extension, then these learning schedules following it also have the certification rolled back.

## MOC PROGRESS REPORT

The MOC Progress report provides information on students' progress in a selected Maintenance of Competency (MOC) curriculum. This report can be scheduled.

### To run the MOC Progress report:

1. From the **Reports**, tab, click the **MOC Progress** link (under the *Education Reports* heading) to open the criteria selection page.
2. Select a report method option.
  - Selecting the *Students Behind Schedule* option will return students who have overdue learning items in the curriculum.
  - Selecting the *Students Approaching the End of a Learning Schedule* option will return students who are approaching the end of their current MOC curriculum schedule with incomplete courses.
3. Select the MOC curriculum for which you want to run the report.
  - 3.1. Click the **Search for MOC Curriculum** link to open the *Browse for an MOC Curriculum* page.
  - 3.2. Search for the curricula for which you want to run the report. You can search by keyword, by category, or alphabetically.

- 3.3. From the search results, select the check box next to the curricula that you want to include on the report.
- 3.4. Click the **Select** button to select the curricula and return to the criteria selection page.
4. Select students or [student groups](#) to include on the report.
  - If you want to include all active students, select the **Report on All Active Students** check box.
  - Click the **Select a Student Group** link to search for student groups.
  - Click the **Search for Students** link to search for students.
  - Student searches allow you to search for inactive students; however, inactive students cannot belong to a student group.
  - If you select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group.
5. Select a **Sort By** option.
6. Select a **Sort Direction** option.
7. If you selected the *Students Approaching the End of a Learning Schedule* report method option, you can specify a date range for the report, either by selecting a predefined range from a list, or by typing dates in the **From** and **Through** boxes. This defines the range in which the current assignment period ends.
8. Click the **Continue** button to run the report.

# My Connections Link Management

My Connections is an optional feature that enables administrators to post links to online resources. If My Connections is enabled at your institution, students will have access to a **My Connections** tab, on which the links are displayed. The tab is divided into three sections: **What's New**, **Learning Links**, and **Resources**.

My Connections links are assigned through student groups, and managed from the **Site Management** section of the **Tools** tab.

## ADDING A MY CONNECTIONS LINK

### To add a My Connections link:

1. From the **Tools** tab, click the **Add a My Connections Link** link to open the *Add a Link* page.
2. From the **Section** list, select the My Connections tab section in which you want the link to appear.
3. In the **Display Text** box, type the text that you want to be displayed.
4. In the **URL (link)** box, type the link's URL (Web address).
5. Type a description for the link in the **Description** box.
6. Select a **Behavior** option to specify whether the link should open in a new browser window or the current one.
7. Select a **Style** option to specify whether the link text should be normal or emphasized (highlighted).
8. Use the **Start Date** and **End Date** boxes to specify the date range during which the link will be visible.
  - **Start Date** is a required field, but **End Date** can be left blank.
9. From the **Student Groups** section, select or create the student groups for whom the link will be visible.
  - Click the **Select Student Groups** link to search for existing groups.
  - Click the **Add New Student Group** link to create a new student group.
  - You can save the link without selecting a student group. This can be useful if you want to save all the link properties as a draft before deciding which groups should receive the link.
10. Click **Save** or **Save and Add Another**.

## SEARCHING FOR MY CONNECTIONS LINKS

### To search for My Connections links:

1. From the **Tools** tab, click the **Manage My Connections Links** to open the *Search Links* page.

2. Enter criteria for the search.
3. Click the **Search** button.

## EDITING MY CONNECTIONS LINKS

### To edit a My Connections link:

1. From the **Tools** tab, click the **Manage My Connections Links** to open the *Search Links* page.
2. Enter criteria for the search.
3. Click the **Search** button.
4. From the search results list, click the link that you want to edit.
5. Make the desired changes on the *Edit a Link* page.
6. Click **Save**.

## ASSIGNING MY CONNECTIONS LINKS

My Connections links are assigned through student groups.

### To assign a My Connections link:

1. From the **Tools** tab, click the **Manage My Connections Links** to open the *Search Links* page.
2. Enter criteria for the search.
3. Click the **Search** button.
4. From the search results list, click the link that you want to assign.
5. From the **Student Groups** section, select or create the student groups for whom the link will be visible.
  - Click the **Select Student Groups** link to search for existing groups.
  - Click the **Add New Student Group** link to create a new student group.
6. Click **Save**.

## COPYING MY CONNECTIONS LINKS

### To copy a My Connections link:

1. From the **Tools** tab, click the **Manage My Connections Links** to open the *Search Links* page.
2. Enter criteria for the search.

3. Click the **Search** button.
4. From the search results list, click the link that you want to copy.
5. Click the **Copy** link at the bottom of the *Edit a Link* page. The word *Copy* appended to the link title indicates that you are now working with a copy.
6. Make any desired changes.
7. Click **Save**.

## DELETING MY CONNECTIONS LINKS

### To delete a My Connections link:

1. From the **Tools** tab, click the **Manage My Connections Links** to open the *Search Links* page.
2. Enter criteria for the search.
3. Click the **Search** button.
4. From the search results list, click the link that you want to delete.
5. Click the **Delete** link at the bottom of the *Edit a Link* page.
6. When prompted to confirm the deletion, click **OK**.

## VIEWING A STUDENT'S MY CONNECTIONS LINKS

You can view a student's *My Connections* page from the student record.

### To view a student's My Connections links:

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Search for the student whose *My Connections* page you want to view.
3. From the search results list, click a student's name to open the *Manage a Student* page.
4. From the left-hand navigation pane, click the **My Connections** link to open the *View Student Connections* page.

## SETTING THE MY CONNECTIONS TAB POSITION

You can make the **My Connections** tab either the first or last tab on the main menu.

### To set the My Connections tab position:

1. From the **Tools** tab, click the **Manage Organization Properties** link to open the *Manage Organization Properties* page.

2. From the **Administrator Settings Section**, select one of the **My Connections Tab Location** options.

# OneSource

## ONESOURCE MEDICAL PRODUCT TRAINING

OneSource enables you to take advantage of HealthStream's partnerships with leading manufacturers of medical equipment and pharmaceuticals. These manufacturers have provided training courses on their products, which you can publish to your organization for assignment or as elective learning.

Before you can use a OneSource course, you must submit a request to the manufacturer. This can be done directly from the HLC. If the manufacturer accepts the request, you can publish the course to your organization. You will be informed of the manufacturer's decision by e-mail, regardless of the decision. If a course that you are interested in is not offered through OneSource, you can request that it be added to the available course list.

You can access OneSource by clicking the **OneSource** link on the Services page (the *OneSource Administrator* role is required).

## COURSE AVAILABILITY

Courses are available for the duration of the contract between HealthStream and the manufacturer. Users will have uninterrupted access to courses while the contract is in effect. Courses will no longer be available after the contract expires or is canceled.

## CHECKING ANNOUNCEMENTS

### To check product announcements:

1. Click the **Services** tab to open the services page.
2. Click the **OneSource** link to open the OneSource landing page.
3. Click the **Announcements** button to open the announcements panel.
  - Click the **Prev** and **Next** buttons to move through new course announcements.

## THE ONESOURCE REQUEST MANAGER

The OneSource Request Manager enables you to manage course requests. Clicking a manufacturer name from the **Manufacturers** list on the left-hand side of the page displays the courses that the manufacturer offers. Courses that only have the **Hide** button next to them are already available and active in your system.

## REQUESTING AN AVAILABLE COURSE

You will be notified by e-mail whether your request is accepted or declined. Be sure that your e-mail address in the system is correct. (See [Managing Your Administrator Profile](#).)

A request expires if the manufacturer does not take action within 15 days after submission. If a request expires, you can request the course again or contact the manufacturer directly to make the course available to your facility.

### To request an available course:

1. Click the **Services** tab to open the Services page.
2. Click the **OneSource** link to open the OneSource landing page.
3. Click the **Getting Started** button to open the OneSource Request Manager.
4. Click the course manufacturer's name in the **Manufacturers** list to display the courses that it offers.
  - The full list of manufacturers may not be displayed. Click the **More...** link to view the complete list.
  - If the list of courses is long, it might be presented over several pages. Use the **Previous**, **Next**, and page number links [ << < [Previous](#) 1 2 3 [Next](#) >> ] to move from page to page. You can change the number of courses that appear on the page by changing the selected value in the **Results per page** list.
5. Click the **Request** button next to the course that you want to request.

## REQUESTING AN UNAVAILABLE COURSE

If you are interested in a course that does not appear in OneSource, you can request that it be added (there is no guarantee that the course you request can be added to OneSource). It can take up to eight months for HealthStream to reach a distribution agreement with the manufacturer.

### To request an unavailable course:

1. Click the **Services** tab to open the Services page.
2. Click the **OneSource** link to open the OneSource landing page.
3. Click the **Getting Started** button to open the OneSource Request Manager.
4. Click the **Request a Course not found** link to open the *New Request* form.
5. Fill out the necessary form fields.
  - An asterisk (\*) indicates that a field is required.
  - Be sure that the **Requestor's Information** section is correct.
6. Click **Save** to submit the request.

## ACCEPTING AN OFFER

When a manufacturer accepts a request, you must then accept the offer and publish the course to make it available in your system.

### ➤ To accept a manufacturer's offer and publish a course:

1. Click the **Services** tab to open the Services page.
2. Click the **OneSource** link to open the OneSource landing page.
3. Click the **Getting Started** button to open the OneSource Request Manager.
4. Click the course manufacturer's name in the **Manufacturers** list to display the courses that it offers.
  - The full list of manufacturers may not be displayed. Click the **More...** link to view the complete list.
  - If the list of courses is long, it might be presented over several pages. Use the **Previous**, **Next**, and page number links [ << < [Previous](#) 1 2 3 [Next](#) >> ] to move from page to page. You can change the number of courses that appear on the page by changing the selected value in the **Results per page** list.
5. Click the **Accept** button next to the course to accept the offer and open the publishing window.
6. Review (and, if necessary, change) the selected publish settings.
  - The Advanced Publish mode is not available.
7. Click the **Publish** button.

## COURSE REQUEST SUMMARY

The Course Request Summary displays the status of requests submitted over the last 30 days.

A request expires if the manufacturer does not take action within 15 days after submission. If a request expires, you can request the course again or contact the manufacturer directly to make the course available to your facility.

### ➤ To view the Course Request Summary:

1. Click the **Services** tab to open the Services page.
2. Click the **OneSource** link to open the OneSource landing page.
3. Click the **Getting Started** button to open the OneSource Request Manager.
4. Click the **Course Status Summary** link on the left-hand side of the page to open the Course Request Summary.

## CANCELING REQUESTS

➤ **To cancel a pending course request:**

1. Click the **Services** tab to open the Services page.
2. Click the **OneSource** link to open the OneSource landing page.
3. Click the **Getting Started** button to open the OneSource Request Manager.
4. Click the course manufacturer's name in the **Manufacturers** list to display the courses that it offers.
  - The full list of manufacturers may not be displayed. Click the **More...** link to view the complete list.
  - If the list of courses is long, it might be presented over several pages. Use the **Previous**, **Next**, and page number links [ << < [Previous](#) 1 2 3 [Next](#) >> >> ] to move from page to page. You can change the number of courses that appear on the page by changing the selected value in the **Results per page** list.
5. Click the **Cancel** button next to the course to cancel the pending request.

## HIDING COURSES

Hiding a course does not remove it from the system; it merely hides it from view. Any administrator with OneSource access can hide and unhide courses. Hidden courses are hidden from all administrators, not just the one who hid it. If a course has been assigned, it cannot be hidden.

A message on the manufacturer's course list will inform you if any of those courses are hidden.

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**Courses for Abbott Point of Care** ➔ Abbott Point of Care has 1 hidden course(s)

Results per page:  2 Record(s)

➤ **To hide a course:**

1. Click the **Services** tab to open the Services page.
2. Click the **OneSource** link to open the OneSource landing page.
3. Click the **Getting Started** button to open the OneSource Request Manager.
4. Click the course manufacturer's name in the **Manufacturers** list to display the courses that it offers.
  - The full list of manufacturers may not be displayed. Click the **More...** link to view the complete list.

- If the list of courses is long, it might be presented over several pages. Use the **Previous**, **Next**, and page number links [ << < [Previous](#) 1 2 3 [Next](#) >> ] to move from page to page. You can change the number of courses that appear on the page by changing the selected value in the **Results per page** list.
5. Click the **Hide** button to hide the course.

## UNHIDING COURSES

Any administrator with OneSource access can hide and unhide courses. Unhiding a course returns it to the course list.

### **To unhide a course:**

1. Click the **Services** tab to open the Services page.
2. Click the **OneSource** link to open the OneSource landing page.
3. Click the **Getting Started** button to open the OneSource Request Manager.
4. Click the **Hidden Courses** link to open the **Hidden Courses** list.
5. Click the **Unhide** button next to the course that you want to unhide.



# Options

## ACQUIRING A STUDENT

Acquiring a student is an optional feature that can be enabled by customer request. This feature allows organizations with multiple facilities within their hierarchy to copy a student record from one institution to another. The student can then have access to both accounts with a single login (User ID and password).

Students who have been acquired by another institution can:

- Log into both institutions using a single login (user ID and password). When logging in, the student is presented with the *Select Affiliation* page and can choose the desired institution to log on to.
- Toggle from one institution login to another by clicking the **Student** link at the top of any page to return to the *Select Affiliation* page.

### To acquire a student:

1. On the **People** tab, click **Acquire a Student**. The *Acquire a Student* page appears.
2. Enter the desired student search criteria.
3. Click **Search**. A list of students matching the search criteria appears.
4. Click the name link of the student you wish to acquire. The *Manage a Student* page appears.
5. Edit general information as needed.
6. Click **Supervisor/Manager** if you wish to identify a supervisor/manager for the student.
7. In the **Hire/re-hire Date** box, change the student's hire/re-hire date, if desired.
8. In the **Review Month/Day** box, change the student's review month and day, if desired.
9. In the **Department** list, select the student's department.
10. In the **Job Title** list, select the student's job title.
11. In the **Active Date** box, change the student's active date, if desired.
12. In the **Student Notes** text area, enter any notes to the student, if desired.
13. In the **Roles** box, the *Student* role is selected by default.
14. Click **Save**.

**Note:** *Acquired students remain active at their original institution. If your intent is to move a student so they are active at a different institution, make sure their record at the original institution is set to inactive.*

★ **Tips**

- Click [  ] to select a date.

## ACQUIRING AN ADMINISTRATOR

Acquiring an administrator allows organizations with multiple facilities within their hierarchy to copy an administrator record from one institution to another. This allows the administrator to use a single login to access both institutions.

Administrators who have been acquired by another institution can:

- Log in to both institutions using a single login (user ID and password). When logging in, the administrator is presented with the *Select Affiliation* page and can choose the desired institution to log into.
- Be designated to different administrator roles for different institutions.
- Toggle from one institution login to another by clicking the **Administrator** link at the top of any page to return to the *Select Affiliation* page.

➡ **To acquire an administrator:**

1. On the **People** tab, click **Acquire an Administrator**. The *Acquire an Administrator* search page appears.
2. Enter desired administrator search criteria.
3. Click **Search**. A list of administrators matching the search criteria appears.
4. Click the name link of the administrator you wish to acquire. The *Manage an Administrator* page appears.
5. Edit general information, as needed.
6. In the **Roles** box, select the desired administrator role(s).
7. In the **Affiliations** box, click **Entire Institution** or **Departments**. If you select **Departments**, select the desired department(s).
8. Click **Save**.

★ **Tips**

- If you need to acquire an administrator who will also need student access to the new institution, you will be able to select the **Grant Student Access** link after the administrator record has been saved.

## INSTITUTION-SPECIFIC ASSIGNMENTS

If your institution is part of a larger hierarchy, you can have a feature enabled that allows you to determine if an assigned course, equivalent, or curriculum can satisfy more than one institution's assignment for students who have been acquired by another institution. When enabled, you can specify that assigned courses, equivalents, or curricula must be completed for your institution specifically. Otherwise, the same course, equivalent, or curriculum completed at either institution will satisfy assignment requirements for both.

If courses, equivalents, or curricula are marked as institution-specific, the Institution-specific **Assigned Learning** area appears on the student's *My Learning* page. This area displays courses, equivalents, and curricula that must be completed at the other institution at which the student is active.

### ➔ To designate an institution-specific assignment:

1. Create a group assignment or individual assignment.
2. Prior to saving the assignment, select the check box to the right of each selected course, equivalent, or curriculum for which you want to require an institution-specific completion.
3. Click **Save**. Students receiving the assignment will now see the Institution-specific **Assigned Learning** area on their *My Learning* pages, which will include all courses, equivalents, and curricula selected as required institution-specific completion.

**Note:** *If a student completes a course, equivalent, or curriculum that satisfies more than one institution assignment (institution-specific completion was not required), the completion is recorded for both or all institutions and appears on completion reports for each. If a course, equivalent, or curriculum is marked Institution-specific Completion Required, a completion occurring at another institution will not satisfy the institution-specific requirement and will not appear on that institution's completion reports.*

With the highlight feature, administrators can create a highlight, or splash page, displaying a customized message for students and administrators upon logging in. Highlights are managed at the Enterprise level. They can be made visible to all students or to all administrators within an Institution or Organization level.

**Note:** *Highlights made visible at the institution level override highlights at the organization level. They will also override HealthStream-posted highlights, such as downtime notices (HealthStream-posted highlights will not be visible).*

Highlights are created with the WYSIWYG editor and can include text, images, and links.

## ADDING A HIGHLIGHT MESSAGE

### ➔ To add a highlight message:

1. On the **Tools** tab of the Enterprise login, click **Add a Highlight**. The *Add a Highlight* page appears.
2. In the **Highlight Label** box, enter the highlight label.
3. In the **Icon URL** box, enter an icon URL if you wish to include a graphic image to the highlight message. Images must be stored on the Internet. **Note:** *If an icon URL is added to a highlight, the image will remain on-page after the highlight is viewed.*
4. Create the highlight text within the WYSIWYG editor. You can include text, images, and links.
5. Leave the **Make this highlight available in the system** check box selected to activate the highlight.
6. Click **Save**.
7. Click **Manage Affiliations**. The *Manage Affiliations* page appears.

8. Click **Add Affiliation**. The *Find Affiliation(s)* page appears.
9. Select the check boxes to the left of the affiliations to which you want to publish the highlight.
10. Click **Select**. The *Affiliation Editor* page appears.
11. The **Make this highlight available in the system for the selected affiliation** check box is selected by default. Clear this box if you do not want this highlight to be available to the selected affiliation.
12. Click **Student** or **Administrator** to indicate the highlight target.
13. Select the **Share with subsidiary affiliations** check box if you want this highlight to be shared with subsidiary institutions.
14. Select the **Send users to this highlight on login** check box to make the highlight visible to the target audience.
15. Select the **Allow users to opt out of seeing this highlight on login** check box if you want the system to present the target audience with a check box that will allow them to choose whether they want to skip the highlight on subsequent logins. If the audience chooses to skip the highlight, the system will place a link on the page to allow the audience to view the highlight at any time.
16. Click **Save**.

## SEARCHING FOR A HIGHLIGHT MESSAGE

### To search for a highlight message:

1. On the **Tools** tab of the Enterprise login, click **Manage Highlights**. The *Search Highlights* page appears.
2. Search for the highlight by entering the highlight name or click search to reveal a list of all highlights.
3. Click the desired highlight name. The *Edit a Highlight* page appears.

## EDITING A HIGHLIGHT MESSAGE

### To edit a highlight message:

1. From the **Tools** menu, select **Manage Highlights**. Search for the highlight message that you want to edit.
2. From the search results, click the name of the desired highlight message. The *Edit a Highlight* page appears.

The highlight label, icon URL and text can be edited from the *Edit a Highlight* page.

## EDITING AFFILIATIONS TO WHICH THE HIGHLIGHT HAS BEEN ASSOCIATED

1. On the *Edit a Highlight* page, click **Manage Affiliations**. The *Manage Affiliations* page appears.

2. Add or delete affiliations as desired.
3. Click **Save**.

### **EDITING TARGET AUDIENCE AND OTHER DISPLAY FEATURES**

1. Click the affiliation name link. The *Affiliation Editor* page appears.
2. Edit display features as desired.
3. Click **Save**.

## **USING HEALTHSTREAM SERVICES TO REPORT TO CE BROKER**

Some customers are creating courses for which they offer CE credit, and need to have that credit reported through CE Broker (Florida providers only). Those customers may choose to contract with HealthStream to provide reporting services to CE Broker.

### **To utilize HealthStream Services to report to CE Broker:**

1. Register with CE Broker as an accredited provider.
2. Work with CE Broker to have HealthStream authorized as a Parent Provider.
3. Create CE courses.
4. In the **Course Identifier** box, enter 20- followed by the course identifier number issued by CE Broker. (You can find the **Course Identifier** box on the *Course Properties* page under **Additional Course Properties**.) **Note:** Only 20- followed by the CE Broker-issued course identifier number should be added. Do not include extra characters or spaces. Entering extraneous characters may result in submissions not being recognized by CE Broker.
5. In the **Provider Number** box, enter 50- followed by the provider number issued by CE Broker. (You can find the **Provider Number** box on the *Accredited/Approved Provider* page.) **Note:** Only 50- followed by the CE Broker-issued provider number should be added. Do not include extra characters or spaces. Entering extraneous characters may result in submissions not being recognized by CE Broker.
6. Notify HealthStream that you wish to purchase the CE Broker reporting service.
7. Provide HealthStream with an e-mail address or FTP site.

CE Broker data transmission is executed every Monday at 6:00 a.m. to include all completions up to the prior Sunday at 11:59 p.m. Once HealthStream receives a report from CE Broker, an extract report will be sent to you via FTP or e-mail.

### **UPON RECEIPT OF AN EXTRACT REPORT**

Review report to confirm or refute errors.

- If no errors are detected, process is ended.

- If errors are confirmed, address errors with CE Broker. (See Sample CE Broker Extract Report.xls.)

### **TO VALIDATE THE 20- NUMBER (COURSE IDENTIFIER)**

Run a Completion Data Export report.

### **TO VALIDATE THE 50- NUMBER (PROVIDER NUMBER)**

1. Click **Manage Accrediting/Approving Bodies**.
2. Search for and select the accrediting/approving body in question.
3. Click **View Accredited/Approved Providers**.
4. Select the accredited/approved provider in question.
5. Review/edit the 50- provider number.
6. Click **Save**.

## **CHECKING SYSTEM REQUIREMENTS**

If you are having problems with the system, you may first run the System Check before contacting your support service.

### **To run the system check:**

On the **My Profile** tab, click **Check System Requirements**. The system will automatically test your system and

report if there are any incompatibilities or deficiencies, as noted by the icon [  ].

## **JOB FUNCTIONS OVERVIEW**

Job functions are a list of optional student demographic criteria that can be added to the system. Job functions provide another criterion for student searching and sorting in addition to the standard search and custom fields. Job functions are maintained at the Enterprise level of an organizational hierarchy and can be used to create profile student groups at any level of the hierarchy, including the Enterprise level.

Students can have an unlimited number of job functions. Job functions give enterprise administrators another criterion for creating student groups in addition to job categories. When job title mapping is not standardized across an organization, determining like audiences for enterprise-wide assignments using job category-driven profile groups may not reach everyone in the intended audience. Job functions can be useful in situations where job title mapping may not work.

HealthStream can enable the job functions feature in your organization by request. Once enabled, an enterprise administrator must manually enter their desired job functions list. Once entered, a job function import file can be uploaded that will match student user ID to the desired job function(s). Each job function associated with a student will also have a job function effective date. The job function import file allows administrators to add or delete job functions from a student record.

Once the job functions feature is enabled, an additional field is created on the Add a Group Assignment and Add an Individual Assignment pages, allowing assignment due dates that are relative (x days before/after) to the job function effective date.

### UTILIZING JOB FUNCTIONS

- The job functions feature is enabled by request.
- The customer organization must decide what job functions will be used and/or what each job function represents (for example, secondary job title, job code, etc.).
- Once the job functions feature is enabled, an enterprise administrator must manually create the organization's list of job functions.
- Ongoing maintenance of job functions can be facilitated via a data import file. Job functions can be added or deleted from the student record.
- Job functions appear at all levels of the enterprise.
- Students can have an unlimited number of job functions.
- Job functions can be utilized along with other criteria to create profile student groups, make assignments, and run reports.

## MANAGING ORGANIZATION PROPERTIES

The *Manage Organization Properties* page is an optional feature that is enabled by customer request. This feature allows administrator access to top-level settings that can be altered at the enterprise level of an organization's system. These organization-wide properties are inherited by every institution in the organization's hierarchy; they cannot be set for institutions or any other level in the hierarchy.

When the *Manage Organization Properties* page is edited, the name of the administrator who made the edits and the time the edits were made are recorded at the bottom of the page.

### To manage organization properties:

1. Log in as an enterprise administrator.
2. On the **Tools** tab, click **Manage Organization Properties**. The *Organization Management* page appears with your organization name at the top.

The *Organization Management* page is divided into three sections. You can adjust the settings within any section that you wish to alter from the default.

### EDITING THE LOGIN PAGE DISPLAY

These optional settings control the behavior of the login page for all users within the organization.

1. Select the **Mask User ID** check box if you wish for the user's entry into the **User ID** field to be masked in the same way that the **Password** field entry is masked with bullets. This option will prevent some browser's auto-complete function from filling in the **User ID** field with another user's ID, which can be helpful on shared computers and terminals.

2. Select the **Password Reminder** check box if you wish for the **Password Reminder** link to appear on the login page.
3. In the **Login Page – Bottom Text** field, enter text that will appear beneath the **User ID** and **Password** fields (within the gray login box).
4. In the **Link Text** field, enter text if you wish to create a hyperlink that appears to the right of the login form on the login page. The text entered here will display as the text for the link. For example you might elect to use this to provide a link to your website homepage or internal support page.
5. In the **Link URL** field, enter the web address to which the Link Text will direct when clicked. The link URL must begin with *http://*.
6. In the **Login Instructions** field, enter text to appear under the header login instructions to the right of the login form box and below the link text.

### **EDITING THE LOGIN AND SESSION SETTINGS**

These settings control the behavior of a user's authentication into your site and their session. Each option has a default value which can be changed.

- The **Student Session Timeout** setting determines when a student will be automatically logged out of the system after a period of inactivity. When a student is actively using the system, this setting will not affect their experience. The default timeout for students is 30 minutes and can be set from 5 minutes to 8 hours.
- The **Admin Session Timeout** setting determines when an administrator will be automatically logged out of the administrator application after a period of inactivity. When an administrator is actively using the system, this setting will not affect their experience. When an administrator is logged in as a student, the Student Session Timeout applies. The default timeout for administrators is 2 hours and can be set from 5 minutes to 8 hours.
- The **Password Regular Expression** field allows you to create a regular expression that ensures users enter a valid password. By default this is blank, meaning any password is permitted. This feature will allow you to require passwords that, for example:
  - Have a specific length, such as a 12-character minimum or a maximum number.
  - Contain letters and/or numbers and/or special characters.
  - Do not contain certain characters.
- The **Password Description** field is used in conjunction with regular expressions. Text here only appears when the **Password Regular Expression** field is used and a user enters an incorrectly formatted password. An alert message on the page will inform the user their password is incorrectly formatted and instruct them on how to format it.

- The **Password Expiration** setting determines when the user's current password expires. At that time the user will be prompted to enter a new password. By default, passwords do not expire. Expiration can be set from 14 days to 365 days.
- The **Password History Size** setting works in conjunction with the **Password Expiration** setting. This setting determines the number of distinct passwords a user must use before reverting back to a previous password.

**Example:** A student's initial password is *America*. With a password history setting of 3, once the password expiration date arrives, the student will be prompted to enter a new password. They cannot reuse *America* as his or her password until prompted for a fifth time. (*America*, password #2, and password #3 are remembered. Once they enter password #4, *America* is released and can be used on the fifth prompt for a new password.)

- The **Login Lockout Attempts** setting indicates how many failed login attempts will result in a user being locked out of the system.
- The **Login Lockout Duration** setting determines how long a user is locked out of the system, should they exceed the **Login Lockout Attempts** limit set above. During the lockout period, the user will be unable to log in and will see a message on the login page explaining when they may try again.
- The **Logout Destination URL** field determines where a user will be directed upon logging off. If this field is left blank, the user is redirected to the login page.

### EDITING ADMINISTRATOR SETTING

These settings affect the system appearance and behavior for administrators.

1. In the **Administrator Footer Message** field, you may enter a text message that will appear at the bottom of each page when a user is logged in as an administrator.
2. Select an assignment start date default using the provided radio buttons. This setting controls the default value that appears in the **Start Date** field when an administrator creates an assignment. **Note:** *When the start date of an assignment arrives, the **Effective Date**, **Start Date**, and **Due Date** settings cannot be edited. This is done to ensure the integrity of assignment report data (as editing these dates will directly impact assignment-based report data).*
  - **Tomorrow's Date:** The **Start Date** field defaults to the next calendar date, relative to the current date.
  - **Today's Date:** The **Start Date** field defaults to the current date.
  - **Blank:** Administrator must enter a start date: The **Start Date** field is blank but requires an entry.
3. Select the **Report Security** check box if you wish for all e-mail recipients of scheduled reports to have a system account and be authenticated (logged in) to view a report.

If this check box is selected, the following process will occur:

1. When an individual receives an e-mail notification that a report is available and clicks the link to visit the report, the system verifies that this user is currently logged on.
2. If the individual is currently logged on, the report is immediately available.
3. If the individual is not currently logged on, the system will require the user to log on to the system. Once the user logs on, the report can be viewed by relaunching the e-mail link.

**Note:** This setting does not apply to the Completion Data Export report. This report is delivered via a .zip file and can be configured to password-protect the .zip file itself.

★ **Tips**

- The logo that appears at the top of the login page can be changed by contacting HealthStream Customer Service.

## RESETTING PASSWORDS

The optional Password Reset feature is enabled by customer request. This feature allows students and administrators to reset their account's password without administrator assistance.

In order for the Password Reset feature to function, the following must be true:

- The organization must have enabled the Self-Password Management and Self-User Management features for all applicable student and administrator roles. Without these features, the user will not have access to the **Forgot Your Password?** link that begins the password reset process. To enable these features, contact your HealthStream support service.
- The user must have an e-mail address associated with his/her account.
- The e-mail address associated with the account must be unique. The Password Reset feature will not function for that student if the e-mail address is on file for more than one user account.

🔄 **To reset a password:**

1. Click the **Forgot Your Password?** link on the login screen. The *Password Reset* page appears. **Note:** This link will only appear if the appropriate features are enabled for the student and/or administrator role.
2. Enter either your user ID or e-mail address for your account.
3. Click **Submit**. The system e-mails the user a confirmation of the password reset request. This e-mail includes instructions and a link to complete the password reset process. **Note:** The user must have a unique e-mail address on file in order to receive the e-mail. If the user does not have an e-mail address on file, or if the submitted e-mail address is associated with more than one user account, an error message will display and instruct the user to contact an administrator for assistance.
4. Click the link provided in the e-mail. The *Reset Your Password* page appears.
5. In the **New Password** box, enter a new password.
6. In the **Confirm New Password** box, enter the new password again.

7. Click **Submit**. A success message will display. **Note:** *The system verifies that the new password meets the length, complexity, and re-use settings for the organization. If the rules for this organization are not met, an error message will display and the user must create a new password.*
8. Click **Login Now**. You are returned to the login page, where you can enter the user ID and new password.

## SETTING THE STUDENT DEFAULT LANDING PAGE

You can specify which page students first see upon logging on to the system.

### To specify the student default landing page:

1. From the **Tools** tab, click the **Manage Organization Properties** link to open the *Manage Organization Properties* page.
2. From the **Administrator Settings Section**, select one of the **Student Default Landing Page** options.



# Reports

## REPORTS OVERVIEW

Reports are listed on the **Reports** tab and are divided into four groups based on the interface tabs that they most closely represent. The four groups are **People**, **Education**, **Courses**, and **Tools**.

Reports open in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of the page.

### ★ Tips

- You may press Alt+R to access the Reports tab via your computer keyboard.
- When you export a report, leading zeroes are handled differently by different export formats. If User IDs, departments, job titles, etc., contain leading zeroes, they **will not** be included in CSV format, but they **will** be included in Excel format.

## REPORT SECURITY

When report security is enabled, anyone who receives a link to a report is required to log on to the system before viewing the report.

## REPORT VIEWER

The *Report Viewer* appears whenever a report is generated. Using the Report Viewer you have the following options:

- Save the report locally to your computer or network drive.
- Print the report.
- Copy the report web address (URL) and share (for example, via e-mail).

## REQUEST MANAGER

Request Manager allows you to view requests and scheduled tasks.

**Requests** include the status of report submissions and course publishing that process in the background.

**Scheduled tasks** include reports that have been scheduled to run at a specific time. You can manage reports that you have previously scheduled; this includes the ability to generate any scheduled report on-demand.

### Requests

## REQUESTS

A *Request* is a process that has been initiated by an administrator and requires time for the system to process. Rather than requiring the administrator to wait for the process to finish before allowing him or her to continue working,

the process is passed over to Request Manager for processing. The administrator is then free to continue using the system. Request Manager allows you to view all requests that you have submitted, along with their statuses.

Requests include:

- Saving a group assignment.
- Publishing a course.
- Registering more than 50 students for a class.

The time it takes for a request to finish processing depends on the type of request, the amount of data being processed, and the current demands from other users. For example, publishing a course to several institutions within an organization may take longer than a course published to a single institution. Requests remain visible in Request Manager for two weeks. Not all requests succeed. In certain situations, a request may fail. Information as to why the request failed is accessible in Request Manager.

## VIEWING THE STATUS OF A REQUEST

### To view the status of a request

1. Click the **Reports** tab.
2. Click **Manage Requests**. The *Manage Scheduled Reports and Tasks* page displays a list of all requests submitted by the administrator logged in, including the Request Name, Status (Completed, Failed, or Pending), Type, Last Updated, and Expires.
3. Select a request from the list to view the details for the selected request.
  - If the request is a course publish or class registration, a **Results** text area will detail information about the request (including if it failed and, if so, why).
  - If the request is a scheduled report, a link to **Scheduled Task Info** appears.

Requests cannot be edited or resubmitted from *Request Manager*.

## DELETING A REQUEST

Requests can be deleted from the list in Request Manager. (This does not undo the actual request that was processed successfully by the system.)

### To delete a request

1. On the *Manage Scheduled Reports and Tasks* page, select the check box that precedes the request(s) that you wish to delete.
2. Click **Delete Selected**. The requests are permanently deleted from Request Manager.

## Scheduled Tasks

## SCHEDULED TASKS

A Scheduled Task is a request that has been configured and set to be processed at a specific time. This includes reports that have been scheduled. You can view scheduled reports, edit their schedule, run the report and delete scheduled reports that are no longer needed.

While the actual schedule of a scheduled report can be edited, the configuration of the report cannot be modified.

## SCHEDULING A REPORT

Most reports can be scheduled to run at a specified interval, with an e-mail notification sent to desired recipients. Refer to the description of each report to see which reports can (and cannot) be scheduled.

Scheduled reports remain visible under Scheduled Tasks until deleted by an administrator.

### To schedule a report

1. Configure the report and click **Continue** to generate it.
2. The report opens in a new browser window. Confirm that you have received the desired results. The report configuration page remains open in the previous browser window.
3. Return to the report configuration window. A **Schedule this Report** link appears on the report configuration screen.
4. Click **Schedule this Report**. The *Scheduling* page appears.
5. In the **Request Name** box, the request name defaults to the name of the report and date and time it was created. (You may want to change to a simpler or more familiar name. For example, J. Doe's Quarterly Rpt – Dept 13579.).
6. In the **E-mail Address** box, change the address that appears or add additional addresses separated by semicolons. The default e-mail address is that of the administrator currently logged on. By default, e-mail recipients of reports are not required to have an account or login in order to view reports for which they are listed as recipients. If you wish to require recipients to log on to access reports, you can enable the **Report Security** option.
7. In the **Report Format** list, select the desired format.
8. Choose how frequently the report will run (**Daily**, **Weekly**, **Monthly**, or **Quarterly**).
  - If you choose **Weekly**, select the day or days of the week on which you want the report to run.
  - If you choose **Monthly** or **Quarterly**, select whether you want the report to run on the first or last day of the month or quarter, or enter the specific day of the month or quarter in the appropriate box. Quarters are defined as calendar quarters.
9. In the **Schedule Start Date** and **Schedule End Date** boxes, enter the duration of the scheduled report. The default duration is 30 days.

10. Click **Save**. The report will be accessible from the *Request Manager* under *Scheduled Tasks* at the interval determined by the schedule selected above. Report data remain available within the Request Manager for 14 days.

To edit or delete a scheduled report, see [Editing a Scheduled Task](#) and [Deleting a Scheduled Task](#).

★ **Tips**

- You can also click the calendar icon to select the dates.

## VIEWING A SCHEDULED TASK

➡ **To view a scheduled task**

1. Click the **Reports** tab.
2. Click **Manage Requests**.
3. Click **Scheduled Tasks** to view a list of all scheduled tasks submitted by the administrator logged in, including the Schedule Name, Next Run date, and Last Updated date and time.
4. Select a task from the list to view the details for the selected scheduled task.
5. In addition to the schedule information, a list of the times that this schedule has been run appears at the bottom of the page. These can be removed from the list by selecting the check box preceding the item and clicking **Delete Selected Requests**. This will not delete the scheduled task itself, just the selected record of when it was run.

The **View** link appearing next to each request is always based on the same report configuration, thus opens the same report. When **Run Now** is clicked (see [Running a Scheduled Task On-Demand](#)) the **View** link is grayed-out until the report is available to be viewed.

## RUNNING A SCHEDULED TASK ON-DEMAND

➡ **To run a scheduled task on-demand**

1. View the task you wish to run.
2. With the scheduled task displayed on page, click **Run Now**. The request is submitted to Request Manager and is listed at the bottom half of the page with a status of *Submitted*.
3. Refresh your Web browser to update the status of the report.
4. When the report status is **Completed**, the **View** link is enabled.
5. Click **View** to view the report.
6. All e-mail recipients specified will receive an e-mail notification that the report is available.

## EDITING A SCHEDULED TASK

### To edit a scheduled task

1. View the task you wish to edit.
2. Click **Edit** to view the details of the selected scheduled task in editable fields.
3. Make the desired edits:
  - You can change the name.
  - You can edit the e-mail address, or add more addresses. Be sure to separate addresses with a semicolon.
  - You can change the report format if alternate formats are available.
  - You can edit the report schedule to be daily, one or week days weekly, a specific day monthly or a specific date quarterly.
  - You can change the schedule's start and end dates.
4. Click **Save**. The scheduled report's schedule has been changed.
5. You may now click **Return to Schedule Manager** to view the scheduled task (in a non-edit mode), or click **Return to Scheduled Tasks** to return to your list of scheduled tasks.

### Tips

- You can also click the calendar icon to select a date.

## DELETING A SCHEDULED TASK

### To delete a scheduled task

1. View the task you wish to delete.
2. Delete the task in one of the following ways:
  - Select the check box to the left of the request name that you wish to delete and click **Delete Selected**.
  - Click the request name to review the report schedule detail before you delete it. The system displays the request information, including the report name, format, and schedule. Click **Delete Schedule**.

Any existing links to schedule reports that were delivered via e-mail will remain functional.

## PEOPLE REPORTS

The following reports are available from the People Reports section of the Reports tab. These reports generally support features and information relative to the People tab.

## DISCIPLINE LISTING REPORT

The *Discipline Listing* report lists all licensure disciplines used in the system. This listing is not configurable. It is available by default for administrators and students (under the **My Profile** tab).

### To create the report

1. On the **Reports** tab, click **Discipline Listing**.

## EXPIRING CERTIFICATION REPORT

The Expiring Certification report returns a list of students whose certification expires within a specified date range. The report will return results for one certifying body at a time. The Expiring Certification report can be scheduled.

### To run the Expiring Certification Report:

1. From the **Reports** tab, click the **Expiring Certification** link to open the criteria selection page.
2. Specify a date range for the report, either by entering dates in the **From** and **Through** boxes, or by selecting a date range from the list under the **From** and **Through** boxes.

- You can use the date selection tool [  ] to select the dates for the **From** and **Through** boxes.
- The *Next 24 Months* and *Next 48 Months* options include the current month.
- The *Past 24 Calendar Months* and *Past 48 Calendar Months* options do not include the current month.

3. Select the students to include in the report. You can run the report for all students in the system, or restrict it to certain students or student groups.

- Select the **Report on All Students** check box to run the report for all students, then select the **Active**, **Inactive**, or **Both** option to return active, inactive, or both active and inactive students, respectively.
- To run the report for certain student groups, click the **Select a Student Group** link to search for and select student groups.
- To run the report for certain students, click the **Search for Students** link to search for and select students.

4. Select a certifying body from the **Select Certifying Body** list.
5. From the **Certification** list, select the check box next to the certifications you want to include in the report.
6. Select **Include Data** options if you want to include students with no certification data or whose certification date is blank in the system.

- Select the **Include certifications with no expiration date** check box if you want to include students who hold the specified certifications, but whose record lacks an expiration date.
- Select the **Include students with no certification information** check box if you want to include students who do not have any certification information in the system.

7. If you want to remove user ID, certifying body, certification number, state/province, or student status columns from the report, click the **Show Additional Options** link and clear the check box next to the appropriate **Display Options** item.
8. To sort the report by expiration date, student name, user ID, certification, job title, or department, click the **Show Additional Options** link and select a **Sort By** option.
9. To change the sort direction (ascending or descending), click the **Show Additional Options** link and select a **Sort Direction** option.
10. Click the **Continue** button to run the report.

## EXPIRING LICENSE REPORT

The *Expiring License* report lists students whose license(s) are expired or about to expire. The report includes all students for the administrator's affiliation (for example, institution or allocated departments).

Data for this report is pulled from the **License/Discipline Information - Expiration Date** field entered by the student. The license expiration date is not a required field for license/discipline information.

### To create the report

1. On the **Reports** tab, click **Expiring License**. The *Expiring License Report* page appears.
2. In the **Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the dates in the **From** and **Through** boxes. The default is **Today**.
3. In the **Disciplines** box, select the check boxes next to the individual disciplines that you would like to include on the report, or select all disciplines by selecting the **Select All** check box.
4. In **Display Options**, select the Include **User ID** check box if you want to include user IDs on the report.
5. In **Sort By**, click **Name**, **User ID**, **Discipline**, or **Expiration Date**.
6. In **Sort Direction**, select **Ascending** or **Descending**.
7. Click **Continue**. The report appears in a new window.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select the date.

## INSTRUCTOR RESUME REPORT

The Instructor Resume report creates either a standard or professional resume with information about a selected instructor, including all classes taught (as tracked in the system) within a given date range.

### To create the report

1. On the **Reports** tab, click **Instructor Resume**. The *Instructor Resume* page appears.
2. Click **Select an Instructor** to search for an instructor. The *Select Instructor* search page appears. Any administrator with the ability to register students for a class or schedule a class (or both) is recognized by the system as an instructor. You will be able to search among these administrators (as well as those with a specific Instructor role).
3. In the **Last**, **First**, and **Middle** boxes, enter the name(s) of the instructor(s) for whom you want to search.
4. In the **User ID(s)** box, enter the user ID(s) of the instructor(s) for whom you want to search.
5. Click **Search**. The results appear in the **Search Results** box. Clicking **Search** without entering a search term will return all instructors in the system.
6. In the **Search Results** box, click the name of the instructor that you want to use for the report. You are returned to the Instructor Resume page with the name of the instructor that you selected next to Instructor.
7. In **Classes Taught**, in the **From** and **Through** boxes, enter the dates during which you want to search. The date range defaults with dates for the past two years.
8. In **Presentation Style**, select **Standard** or **Professional**. Standard produces a basic resume using alternating row colors for contrast. Professional creates a more formal resume with a cleaner look and a more stylistic typeface, ideal for inclusion with class packets.
9. In **Display Options**, select Include **Course IDs**, **Include Class Locations**, or **Include Comments**.
10. Click **Continue**. The resume appears in a new window.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select the date.

## ROLE FEATURES REPORT

The *Role Features* report displays the system features that are active for a selected role. Printing reports for different roles will allow you to compare and contrast roles and aid in planning new roles.

New roles are created by contacting your system Support Service. Once you determine your requirements, call or write for further assistance.

For a definition of features, see [Definition of Features in the Role Features Report](#).

### To create the report

1. On the **Reports** tab, click **Role Features**. The *Role Features* page appears.
2. In the **Role** list, select an existing administrator role.
3. Click **Continue**. The report appears in a new window.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

## ROLE UTILIZATION REPORT

The *Role Utilization* report lists all administrators at an affiliation (e.g. institution, department, branch of a hierarchy). The report includes each administrator's name, role(s) and e-mail address.

### To create the report

1. On the **Reports** tab, click **Role Utilization**. The *Role Utilization* page appears.
2. In **Affiliation**, the currently selected affiliation appears. If you wish to change it, click **Select an Affiliation...** to search for one or more affiliations in the organizational hierarchy. For more information on selecting an affiliation, see *Searching for Affiliations for a Report*. You are returned to the *Role Utilization* page and the affiliation that you selected appears next to **Affiliation**.
3. In **Role Type**, select **Administrator** or **Student**.
4. In the **Role** box, select one or more check boxes next to the desired roles.
5. In **Display Options**, select the **Include subsidiary institutions in search**, **Include User ID**, and/or **Include E-mail** check boxes. Note: Use caution when including the user ID on this report as it can present a security risk.
6. In **Group By**, select **Last Name** (default) or **Role Name**.
7. Click **Continue**. The report appears in a new window.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the *Schedule This Report* link found at the top right of page.

## STUDENT AND GROUP TRANSCRIPT REPORT

The *Student and Group Transcript* report generates one or more student transcripts with the option to include active and inactive students.

 **To run this report**

1. On the **Reports** tab, click **Student and Group Transcript Report**. The *Student and Group Transcript* page appears.
2. In **Report View**, click **Completion Date** or **Completion Name (Alphabetical)**.
3. In the **Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the dates in the **From** and **Through** boxes. The default is **Last 12 Months**.
4. In **Students**, select the **Report on All Active Students** check box if you want the report to include all active students, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. See *Selecting a Student Group for a Report* and *Searching for Students for a Report*. If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must select and create a profile student group.
5. In **Completions To Include**, click **All**, **Assigned only**, **Elective only**, or **Learning Events only**.
6. Click **Show Additional Options** if you wish to further define your report configuration; otherwise, proceed to step 11. If you choose the add additional criteria, the *Student and Group Transcript* report page refreshes to include additional fields.
7. In **Student Demographics**, select the check boxes next to the desired options:
  - **Include Student User ID**
  - **Include Job Title**
  - **Include Job Category**
  - **Include Department**
  - **Include Hire/Re-hire Date**
  - **Include Active Date**
  - **Include Review Date**
8. In **Transcript Data Options**, select the check boxes next to the desired options:
  - **Include Estimated Time (selected by default)**
  - **Include Time with Completion Date**

- **Include Course Score**
  - **Include Learning Event Comments (selected by default)**
  - **Include Failed Courses**
9. In **Learning Events**, select the **Include Administrator-entered** and/or **Include Student-entered** check boxes. Both are selected by default. Student-entered learning event capability is an optional feature that can be enabled by request. If you do not have student-entered learning events enabled at your organization, ignore the student-entered option on the report configuration.
10. In **Sort Students By**, select **Student Name** or **Department**.
11. Click **Continue**. The report will open in a secondary window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- This report is also accessible by clicking My Transcript from the left-hand navigation tree of a student's General Information page.
- You can also click the calendar icon to select the date.

## STUDENT ASSIGNMENT COMPLETION REPORT

The Student Assignment Completion report generates the student detail layer of the Assignment Completion Drill-Through report for one or more students.

### ➡ To create the report

1. On the **Reports** tab, click **Student Assignment Completion**. The *Student Assignment Completion* page appears.
2. Click Search for Students to select one or more students for the report. See Searching for Students for a Report for more information. If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group.
3. In **Score Not Yet Due As**, select **Not Yet Due**, **Completed On Time**, **Delinquent**, or **Not Scored**. See Scoring Not Yet Due Students in Assignment-based Reports for more detail.
4. In the **Due Date Range** box, select the range of due dates of the courses you want to use in the report. You can select the date range from the list, or enter the dates in the **From** and **Through** boxes. The

report will look for instances of the selected courses with due dates within this range, inclusive of the specified dates. The default is **Last 12 Months**.

5. In **Presentation**, select **Standard Report** or **Data Tables Only (no headers)**. Standard Report includes report headers. Data Tables Only (no headers) includes the tabled data and is suitable for use in spreadsheet and database applications.
6. In **Display Options**, select the **Include User ID** and/or **Include Job Title** check boxes.
7. Click **Continue**. The report appears in a new window.

#### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- This report is also accessible by clicking **Student Assignment Rpt** from the left-hand navigation tree of a student's *General Information* page.
- You can also click the calendar icon to select the date.

#### Related Topics

- [Scheduling a Report](#)

## STUDENT GROUP REPORT

The *Student Group* report displays all students in a student group, with various sort options.

Student groups can only contain active students. When a student becomes inactive, the student is dropped from any individual student groups to which they belonged and no longer appear in profile student groups.

#### ➡ To create the report

1. On the **Reports** tab, click **Student Group**. The *Student Group* page appears.
2. Click **Select a Student Group** to select a student group for the report. See *Selecting a Student Group for a Report*.
3. In **Display Options**, select the **Include Profile Student Group Criteria** and/or **Include User ID** check boxes.
4. In **Sort By**, select **Last Name (default)**, **User ID**, **Dept. Name**, **Dept. Code**, or **Job Title**.
5. Click **Continue**. The report appears in a new window.

#### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

## STUDENT IMPORT RESULTS REPORT

The Student Import Results report displays import results for customer-supplied data imports. This report should be run (or scheduled to run) on a regular basis following routine data imports to check for exceptions and discrepancies.

### To create the report

1. On the **Reports** tab, click **Student Import Results**. The *Student Import Results* page appears.
2. In the **Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the dates in the **From** and **Through** boxes.
3. Click **Continue**. The report appears in a new window.

### INTERPRETING THE REPORT

- **Import Status Summary** shows the number of successfully imported student records and the number of failed students, if any.

- **Import Action Summary** shows the number of students added, student records updated, job titles added, and custom field values added to drop-down custom fields.

**Import Error Detail** itemizes each error, or exception, with a description. Use this information to check the source of your data file that was sent to HealthStream for import.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select the date.

## STUDENT LISTING REPORT

The *Student Listing* report displays all students based on selected criteria.

### To create the report

1. On the **Reports** tab, click **Student Listing**. The *Student Listing* page appears.
2. Click **Select Student Criteria** to select the students for the report. The *Search Students* page appears.
3. Enter search criteria.
4. Click **Search**. You are returned to the *Student Listing* page where the phrase **Student Criteria Selected** now appears next to **Student Criteria**. If you search for and select specific students for the

report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included.

5. In **Display Options**, select the **Include User ID** check box if you want to include the students' user IDs in the report.
6. In **Sort By**, select **Student Name (default)**, **User ID**, **Job Title**, **Job Category Name**, or **Department**.
7. Click **Continue**. The report appears in a new window.

#### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page. See *Scheduling a Report*.

## COURSE REPORTS

The following reports are available from the Courses Reports section of the Reports tab. These reports generally support features and information relative to the Courses tab.

### ANNOTATIONS REPORT

The *Annotations* report provides a view of annotations for one or more courses. You can view active annotations, inactive annotations, or both. The report shows all annotations whether they are institution-wide, department-specific or job category specific.

#### ➡ To create the report

1. On the **Reports** tab, click **Annotations**. The *Course Annotations* page appears.
2. Click **Select Courses** to select one or more courses to appear on the report. Only courses that can be annotated can be selected. See *Searching for Courses for a Report*.
3. In **Annotations to Include**, select **Active**, **Inactive**, or **Both**.
4. Click **Continue**. The report appears in a new window.

#### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

### CE CREDIT COURSES REPORT

The CE Credit Courses report displays courses that offer CE credit. This report can be scheduled.

➔ **To run the CE Credit Courses report:**

1. From the **Reports** tab, click the **CE Credit Courses** link (in the **Course Reports** section) to open the *CE Credit Courses* page.
2. Select a date range.
  - If you want to view courses whose expiration date falls within a specific date range, click the **Expiration Date Range** option button and select a predefined date range (*Today, Past 48 Calendar Months*, etc.) from the date range list.
  - If you want to view courses whose creation date falls within a specific date range, click the **Course Creation Date Range** option button and enter dates in the **From** and **Through** boxes.
3. Select either basic or advanced filter options.
  - The basic filter options are displayed by default. These are accrediting body/course provider/credit name display/certificate template combinations. Select the check box next to the options that you want to include on the report. Select or clear the **All** check box to select or clear all of the basic option check boxes.
  - If you want to limit the report to a single accrediting body, credit display name, course provider, or certificate template, click the **Show Advanced Options** link to display the advanced filter options. Then click the option button next to the option name (**Accrediting Body, Credit Display Name**, etc.) and choose a value from the corresponding list.
4. The courses that appear on the report are grouped by accrediting body. If you want a page break to be inserted between groups, select the **Include Page Break after each group** check box.
5. Click the **Continue** button to open the report in a new browser window.

After you run the report, you can export it as a .csv file, which can be opened in a spreadsheet application like Microsoft Excel.

To download the report:

6. Select an export format from the **Export Format** list at the top of the page.
7. Click the **Export** icon [  ]. Depending on your browser version and the export format that you chose, either
  - the report will open in the selected format in new browser window, which you can save by selecting **Save As** from your browser's **File** menu; or
  - a *Save File* dialog will prompt you for a location on your computer to which to save the export file.

## COURSE DEVELOPMENT STATUS REPORT

The *Course Development Status* report checks the status of courses with any or all selected development status options. By default, this report includes all courses, with the option to not include courses that are live (published and active) in the system.

### To create the report

1. On the **Reports** tab, click **Course Development Status**. The *Course Development Status* page appears.
2. In **Course Creation Date**, in the **From** and **Through** boxes, enter the dates during which you want to search. The default is **Last 12 Months**.
3. In **Status**, select the **Select All** check box if you want to include all statuses in the report or select the check boxes to the left of the individual statuses you want to appear in the report.
4. In **Display Options**, select the **Include Courses that have been Published and are Active in the HLC (default)** and/or **Include User ID of Administrators who have updated course status** check boxes.
5. In **Sort By**, select **Course Name (default)**, **Original Author (name)**, or **Created on Date**.
6. Click **Continue**. The report appears in a new window.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## COURSE LISTING REPORT

The *Course Listing* report displays a printable list of all courses active in the system, with the option to filter courses that contain specific types of learning activities.

### To create the report

1. On the **Reports** tab, click **Course Listing**. The *Course Listing* page appears.
2. In **Include courses that contain the following learning activity types**, all learning activity types are selected by default. Clear any of these check boxes to filter the report, but at least one must be selected.
3. In **Display Options**, select the **Display Course Details** check box if you wish to see the details of the course, including description and CE information.

4. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## EVALUATION STRUCTURE REPORT

The *Evaluation Structure* report displays the entire contents of a course's evaluation, including settings and questions, to review the composition and structure of the evaluation. This report does not include student responses or scores.

### 🔄 To create the report

1. On the **Reports** tab, click **Evaluation Structure**. The *Evaluation Structure* page appears.
2. Click **Select a Course** to search for the course that contains the evaluation. (Only those courses that contain an evaluation will be searchable.) See *Searching for Courses for a Report* for more information.
3. Click **Select Evaluation** to search for the evaluation within the course for which you are requesting the report. You may only select one evaluation per report. The Test Edition Selector page appears.
4. Select the evaluation you want to use in the navigation tree to the left.
5. Click **Continue**. You are returned to the *Evaluation Structure* page with the evaluation that you selected next to **Evaluation**.
6. Click **Continue**. The report appears in a new window.

## EXPIRING COURSES REPORT

The *Expiring Courses* report displays a list of courses that are set to expire between the next 30 days to the next 365 days. This includes administrator-developed courses to which an inactivation date has been added on the course properties page, as well as any third party content that has a contract and expiration date.

### 🔄 To create the report

1. On the **Reports** tab, click **Expiring Courses**. The *Expiring Courses* page appears.
2. In **Date Range**, select **30 days**, **60 days**, **90 days**, **180 days**, or **1 Year**.
3. In **Sort By**, select **Course Name** or **Expiration Date**.
4. Click **Continue**. The report appears in a new window.

★ **Tips**

• This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

## TEST STRUCTURE REPORT

The *Test Structure* report displays the entire contents of a course's test, including settings, questions, answers and rationale, to review the composition and structure of the test. This report does not include student responses or scores.

➡ **To create the report**

1. On the **Reports** tab, click **Test Structure**. The *Test Structure* page appears.
2. Click **Select Course** to search for the course that contains the test. Only those courses that contain a test will be searchable. See *Searching for Courses for a Report* for more information.
3. Click **Select Test** to select the test within the course for which you are requesting the report. You may only select one test per report. The *Test Edition Selector* page appears.
4. Select the test you want to use in the navigation tree to the left.
5. Click **Continue**. You are returned to the *Test Structure* page with the test that you selected next to **Test**.

Click **Continue**. The report appears in a new window.

## EDUCATION REPORTS

The following reports are available from the **Education Reports** section of the **Reports** tab. These reports generally support features and information relative to the **Education** tab.

### Assigned Learning Report

The Assigned Learning Report displays learning items currently assigned to a group of students. Only current group assignments are included on the report (i.e., the assignment end date has not passed). Individual assignments are not included on the report.

This report can be scheduled. See [Scheduling a Report](#) for more information.

#### To run the Assigned Learning Report:

1. Click the **Reports** tab to open the Reports page.

2. Click the **Assigned Learning** link (in the **Education Reports** section) to open the Assigned Learning page.
3. In the **Learning items to include** section, select the check box next to the learning item types that you want to appear on the report.
4. Select an option from the **Show assignments made to** section to display a list of items in the box below. For example, if you select *Departments*, then a list of departments will be displayed.
5. Select the check box next to the list items that you want to include on the report.
6. Select a **Group by** option.
7. Click the **Continue** button to run the report and open it in a new browser window.

#### To print the report:

Click the **Print** button to open a Print dialog. Now you can select your print settings and print the report.

#### To export the report:

1. Click the **Export** button to open a list of format options.
2. Click a format option to open a Save File dialog.
  - If you select PDF, a PDF version of the transcript will open in a new browser window.
3. Save the file to your computer.

## ASSIGNMENT COMPLETION - DRILL-THROUGH REPORT

The *Assignment Completion Drill-Through* report tracks student status toward the completion of assigned learning. This report relies on assignment data but is not constrained to a specific assignment. Therefore assignments must not be deleted unless that report data are no longer needed.

The administrator may select specific courses, curricula, equivalents, and students to report on through the search feature. All assigned course, curriculum, or equivalent instances that meet the report criteria will be included, regardless of which assignment(s) the learning may be associated with, or an assignment may be selected (as a short cut) that will return the courses, curricula, equivalents, and student group(s) associated with that assignment.

### REPORT METHODS

This report offers two methods for analyzing data: **Status Method** (based on a date range when courses are due) and **Completion Method** (based on a date range in which completions may have occurred). To help distinguish which method was used for a report, the **Description** option allows you to include a text description on the summary level of the report.

The **Status Method** displays all courses, curricula, or equivalents (among those selected) that have due dates in the specified date range. Courses, curricula, or equivalents that have a completion that falls outside of the due date range will be included in the report as long as the due date is within the range.

The **Completion Method** first displays all assigned courses, curricula, or equivalents (among those selected) that were completed during the specified completion date range. If there is not a completion of the course, curriculum, or equivalent for a student, the report displays all incomplete assignment instances and their statuses.

In summary, the two report methods offer two different reports. One report is based on assignment due dates. The other report is based on completions during a specified completion date range and, if there is no completion, the student's assignment status.

A description of each method is always included in the report on the *Summary* page and the *Completion Grid*.

## REPORT FOCUS

Both report methods offer three perspectives of the data: Courses, Curricula, or Equivalents focus, Departments focus, and Completion Grid Only focus.

- **Courses, Curricula, or Equivalents** focus allows you to view student status, beginning with a summary of the learning option selected. From there you can drill through to progressive levels of detail: **Status by Department, Learning Detail (single department), and Student Detail**. From any layer of the report you can also access the *Completion Grid*.
- **Departments** focus allows you to view student statuses, beginning with a summary of the departments in which the students reside. From there you can drill through progressive levels of detail: **Department Detail (single department) and Student Detail**. From any layer of the report you can also access the *Completion Grid*.
- **The Completion Grid Only** focus displays a full size table of courses, curricula, equivalents, and students with statuses and dates at the learning/student intersections. It consists of one level; a singular table of data. Though not a drill through report, it remains here for convenience. When a **Courses, Curricula, or Equivalents** focus or **Departments** focus report is created, you can return to the configuration page and select the *Completion Grid* (and vice versa).

## NOTE ON STATUS METHOD

If a course, curriculum, or equivalent is included in multiple assignments and the respective due dates fall within the due date range, some or all students will appear on the report for each assignment instance that falls within that date range. For example, a student may have assigned learning within an enterprise assignment and the same assigned learning within an institution assignment, each with different due dates. If both assignment instances fall within the due date range of the assignment completion report request, both will appear for that student on the report.

Example: A student has received an enterprise assignment for Sample Simulation Fire Safety (assignment instance A) with a due date of 12/31/08. The local institution administrator assigns the same course with a due date of 11/30/08 (instance B). The student completes instance A on 12/15/08. The student would appear on one line of the report for the 11/30/08 due date with the 12/15/08 completion noted as completed late. The next line for the due date of 12/31/08 with his 12/15/08 completion (assignment instance B) would be noted as completed on time.

## IMPORTANT OPTIONS TO CONSIDER

The following are important options that should be considered when generating the report:

**Assignment criteria option:** In addition to searching for individual courses curricula, or equivalents, you can select a single assignment's learning and students. The courses, curricula, equivalents, and student group(s) appearing in an assignment will populate the courses, curricula, equivalents, and students section of your report criteria. You will still need to specify the due date range. The assignment's due date is not inserted in the report configuration.

**Group by Department:** When the **Courses, Curricula, or Equivalents** focus or **Completion Grid Only** focus is selected, the *Summary* page of the report shows each course, curriculum, or equivalent with a list of each department where students have an assignment of the learning. **Course, Curriculum, or Equivalent Detail** and **Completion Grid** layers are also grouped by department when this is selected.

**Detailed Department summary:** When the **Departments** focus is selected, the *Summary* page of the report shows the courses, curricula, or equivalents each department has (from the selected learning).

**Include Status by Department Layer:** When the **Courses, Curricula, or Equivalents** focus is selected, the **Status by Department Layer** appears as the second layer of the report. From there, the **Course, Curriculum, or Equivalent Detail** layers feature data for a single department. When this option is deselected, the **Course, Curriculum, or Equivalent Status** layer is excluded from the report and the **Course, Curriculum, or Equivalent Detail** layer appears as the second layer of the report. The **Course, Curriculum, or Equivalent Detail** layer displays all students assigned the selected learning, regardless of their departments. (This layer can also be grouped by department.)

## LEARNING EVENTS

A learning event can satisfy a past due or delinquent course assignment. The completion status will reflect the completion date of the learning event relative to the assignment due date.

For example: A course due date was June 30. The student is past due but can still complete the course (the due date is displayed in red on the *My Learning* page). A learning event is entered with a completion date after June 30. The course assignment will be satisfied by the learning event, and the assignment status on assignment reports will be listed as **Completed Late**. If the learning event completion date is prior to June 30, the assignment status will be listed as **Completed On Time**.

### To create the report

1. On the **Reports** tab, click **Assignment Completion – Drill-Through**. The *Assignment Completion – Drill-Through* page appears.
2. In **Report Method**, select **Status Method – based on Due Date Range** or **Completion Method – based on Completion Date Range**. The **Due Date Range** boxes will update to reflect your selection.
3. In **Report Focus**, click **Courses, Curricula, or Equivalents, Departments, or Completion Grid Only**.
4. In the **Due Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the months in the **From** and **Through** boxes. The default is **Last 12 Months**.
5. In **Learning**, select the **Report on All Assignments for Students Selected** check box if you want the report to include all available learning in the system that are assigned to the selected students, click **Select an Assignment** to search for and include all learning items within a specified assignment, or click **Search for Courses, Curricula, or Equivalents** to search for learning items. (See *Selecting an Assignment for a Report and Searching for Courses, Curricula, or Equivalents for a Report* for more information about these processes.) You are returned to the *Assignment Completion – Drill-Through* page with the learning items that you selected in the **Learning** box. *Note: If you select an assignment and there are learning activities and students associated with that assignment, then the learning activities appear in the Learning box and the associated students appear in the Students box.*

6. In **Students**, select the **Report on All Active Students** check box if you want the report to include all active students within the system, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. (See *Selecting a Student Group for a Report* and *Searching for Students for a Report* for more information about these processes). You are returned to the *Assignment Completion – Drill-Through* page with the student groups or students that you selected in the Students box. Note that:
  - Inactive students do not have assignments and are therefore not included in this report.
  - If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group.
7. In **Display Options**, select the **Group by Department** check box if you want the report to group the data by department (applies only to *Courses, Curricula, or Equivalent* focus and *Completion Grid Only* focus).
8. Click **Show Additional Options** if you wish to further define your report configuration; otherwise, proceed to step 14. If you choose to add additional criteria, the *Assignment Completion – Drill-Through* report page refreshes to include additional fields.
9. In **Display Options**, select the **Include Student User ID, Include Student Department, Include Job Title**, and/or **Include Status by Department Layer** check boxes. User ID and job title are displayed on the Student Detail layer (department is always displayed on this layer) and all three can be included as additional columns in the completion grid. The **Include Status by Department Layer** check box is selected by default. When cleared, clicking a learning item on the *Course, Curriculum, or Equivalent Summary* layer of the report leads directly to the *Course, Curriculum, or Equivalent Details* layer which displays all students selected for the report with an assignment of the selected learning (instead of students in a single department).
10. In **Score Not Yet Due As**, select **Not Yet Due** (default), **Completed On Time, Delinquent, or Not Scored**. The report will contain the students' scores in the header. See *Scoring Not Yet Due Students in Assignments-based Reports*.
11. In **Display Criteria**, select **Summary** (default) or **Detailed Appendix**. This determines whether the report includes a detailed appendix of the report criteria. This information appears at the bottom of the report.
12. In **Sort Detail Pages By**, select **Name** (default) or **Status**. If you select **Status**, the **Course, Curriculum, or Equivalent Detail, Department Detail, and Student Detail** layers display students and learning by status first, then by their names.
13. In **Sort Order**, select **Ascending** (default) or **Descending**. If you do not click **Show Additional Options**, the default settings (noted above) are used.

Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.
- Because the report opens in a new window, you can return to the report configuration page and edit your report criteria to create another report. Or, you can quickly switch between the various focus options to create variations of the report.
- The **Unique Students Involved** statistic refers to the number of unique students selected in the **Students** section of the criteria selection page.

## ASSIGNMENT COMPLETION REPORT - SCHEDULABLE

The *Assignment Completion - Schedulable* report tracks student status toward the completion of assigned learning. This report relies on assignment data but is not constrained to a specific assignment.

The administrator may select specific courses, curricula, equivalents, and students to report on through the search feature, or an assignment may be selected (as a short-cut) that will return the courses, curricula, equivalents, and student group(s) associated with that assignment. All assigned course, curriculum, or equivalent instances that meet the report criteria will be included, regardless of which assignment(s) they may be associated with.

This report has been designed for improved compatibility with Microsoft Excel and compatible applications. Excel (2007 and earlier) has a maximum limit of 65,000 rows and CSV files exported from this report may exceed this limit.

### **SORTING OPTIONS**

This report offers three sorting options. Because reports open in a new window, you can easily return to the report user interface, change the sorting option, and regenerate the report using the same settings.

- **Department, Student, Item:** Data are sorted first by department, then students in each department and each course, curriculum, or equivalent per student (based on report criteria).
- **Department, Item, Student:** Data are sorted first by department, then courses, curricula, or equivalents (based on report criteria) assigned to students in each department, and then each student assigned the course, curriculum, or equivalent.
- **Item, Department, Student:** Data are sorted first by courses, curricula, or equivalents (based on report criteria), then departments where the learning item was assigned, then students in the department assigned the course, curriculum, or equivalent.

### **IMPORTANT OPTIONS:**

- **Due Date Range:** The report will look for instances of the selected learning with due dates in this range. This range is inclusive of the **From** and **Through** dates.
- **Assignment Criteria option:** In addition to searching for individual courses, curricula, or equivalents, you can select a single assignment's learning items and students. The learning and student group(s) appearing in an assignment

will populate the learning items and students section of your report criteria. You will still need to specify the due date range. The assignment's due date is not automatically inserted in the report configuration.

• **Format Options:** The report can include page breaks (default) for easier viewing and printing from your browser, or it can exclude page breaks, which results in the report being exported directly in CSV format.

## LEARNING EVENTS

A learning event can satisfy a past due or delinquent course assignment. The completion status will reflect the completion date of the learning event relative to the assignment due date.

For example: A course due date was June 30. The student is past due but can still complete the course (the due date is displayed in red on the *My Learning* page). A learning event is entered with a completion date after June 30. The course assignment will be satisfied by the learning event, and the assignment status on assignment reports will be listed as **Completed Late**. If the learning event completion date is prior to June 30, the assignment status will be listed as **Completed On Time**.

### To create the report

1. On the **Reports** tab, click **Assignment Completion - Schedulable**. The *Assignment Completion - Schedulable* page appears.
2. In the **Sort By** list, select how you want the report data sorted.
3. In the **Due Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the months in the **From** and **Through** boxes. The default is **Current Year**.
4. In **Learning**, select the **Select All** check box if you want the report to include all available learning items in the system, click **Select an Assignment** to search for and include all learning items within a specified assignment, or click **Search for Courses, Curriculum, or Equivalent**s to search for learning items. See *Selecting an Assignment for a Report* and *Searching for Courses, Curriculum, or Equivalent*s for a Report.
5. In **Students**, select the **Select All** check box if you want the report to include all active students in the system, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. See *Selecting a Student Group for a Report* and *Searching for Students for a Report* later in this document. Note that:
  - Inactive students do not have assignments and are therefore not included in this report.
  - If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group.
6. In **Display Options**, select the **Include Student User ID** check box if you want to include the students' user IDs in the report.
7. In **Format Options**, select **Include Page Breaks** (for printing from your browser) or **Do Not Include Page Breaks** (provides direct compatibility with Excel).

8. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.
- Because the report opens in a new window, once you close the window (or switch windows) you can edit your report criteria and create another report. Or, you can quickly switch between different **Sort By** options to create variations of the report.

## CHECKLIST TASK ANALYSIS REPORT

The Checklist Task Analysis report displays the number of students who have completed the checklist, the number of tasks on the checklist, and the total number of checklist attempts. For each checklist task, the number and percentage of times that the task was passed, failed, or skipped is also displayed.

### ➡ To run the Checklist Task Analysis report:

1. From the **Education Reports** section of the **Reports** tab, click the **Checklist Task Analysis** link to open the criteria selection page.
2. Click the **Select a Course** link to open the *Browse for a Course* page.
3. Search for the course that contains the checklist for which you want to run the report.
4. From the search results, click the course name to select it and return to the criteria selection page.
5. Select a course version from the **Course Version** list.
6. Click the **Select a Checklist** link to open the *Checklist Override Selector* page.
7. From the left-hand pane, click a checklist name to select it.
8. Click the **Continue** button to return to the criteria selection page.
9. Specify a completion date range.
  - Select the option button next to the predefined range list and select a predefined date range, or
  - Select the option button next to the **From** box and enter dates in the **From** and **Through** boxes.
10. Click the **Continue** button to run the report.

## CLASS CONTACTS REPORT

The *Class Contacts* report creates a list of instructors and registered students (with option to include waitlisted students) for a specific class, including their contact information. This report is useful for notifying participants of any changes to a scheduled class. This can also be used for generating a list of waitlisted students (only) so that you can remove them from the roster and reschedule them for another class or to contact them about their options.

Contact information, such as phone number, will only be visible if the personal address and phone information has been added in the *My Profile* section of the student record. Instructor information will appear if the instructor has entered business address information in the administrator record.

### To create the report

1. On the **Reports** tab, click **Class Contacts**. The *Class Contacts* page appears.
2. Click **Select a Class** to select a class for the report. The *Search for Classes* page appears.
3. Enter desired search criteria. You may or may not, depending on your organizational hierarchy, be able to search additional affiliations by clicking **Search Affiliations**. (See *Searching for Affiliations for a Report* for more information.) You are returned to the *Search for Classes* page with the affiliation(s) that you selected in the **Class Affiliation** box. You may also filter your search by **Grading Status: Any, Grading Complete (Hidden), or Grading Not Complete (Visible)**. Selecting the **Grading Complete for This Class** check box when grading a class automatically moves the class to **Hidden** status.
4. Click **Search**. A list of all classes meeting your specified search criteria will appear.
5. Click the name link of the desired class. You are returned to the *Class Contacts* page with the class that you selected next to **Class Name**.
6. In **Class Status**, select **Registered Only, Wait List Only, or All Students**.
7. In **Display Options**, select the **Include User ID, Include Department, Include Supervisor Name, Include Email**, and/or **Include Instructors** check boxes.
8. In **Sort By**, select **Student Last Name, Department Code, or Department Name**.
9. Click **Continue**. The report appears in a new window.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

## **CLASS GRADING STATUS BY ADMINISTRATOR REPORT**

The *Class Grading Status by Administrator* report audits the status of classes to determine if grading has been completed - a crucial requirement for blended learning courses (students cannot complete a course until their class is graded).

### To create the report

1. On the **Reports** tab, click **Class Grading Status by Administrator**. The *Class Grading Status by Administrator* page appears.
2. Click **Select a Class Scheduler** to select one or more class schedulers (administrators). The *Select Administrator(s)* page appears.
3. Enter search criteria, such as name, user ID or department affiliation.
4. Click **Search**. A listing of administrators matching the search criteria appears.
5. Select the check boxes to the left of the administrator name(s) you wish to use in the report or click **Check All Current Search Results** if you want to use all of the administrators.
6. Click **Continue**. You are returned to the *Class Grading Status by Administrator* page with the administrator(s) that you selected in the **Administrator** box.
7. In the **Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the months in the **From** and **Through** boxes. The default is **Last 60 Days**.
8. In **Class Type**, select **All Class Types**, **Classroom**, or **Virtual Classroom**.
9. In **Grading Status**, select **All**, **Grading Complete**, or **Grading Not Complete**.
10. Click **Continue**. The report appears in a new window.

#### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## CLASS GRADING STATUS BY COURSE REPORT

The Class Grading Status by Course report audits the status of classes to determine if grading has been completed - a crucial requirement for blended learning courses (students cannot complete a course until their class is graded). This report is based on one or more selected class learning activities (and all of its associated scheduled classes).

#### ➡ To create the report

1. On the **Reports** tab, click **Class Grading Status by Course**. The *Class Grading Status by Course* page appears.
2. Click *Select a Course* to select a course for the report. The *Browse for a Course* page appears.
3. Conduct a course search. You can search alphabetically, by category, or whole word or partial word + wildcard.

4. Click **Search**. The system returns a listing of all courses that match your search criteria.
5. Click the name link of the desired course. You are returned to the *Class Grading Status by Course* page with the name of the course that you selected next to **Course**. All class learning activities for this course will appear in the **Class Learning Activities** box. Select one or more learning activities to include in the report.
6. In the **Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the months in the **From** and **Through** boxes. The default is **Last 60 Days**.
7. In **Grading Status**, select **All**, **Grading Complete**, or **Grading Not Complete**.
8. Click **Continue**. The report appears in a new window.

★ **Tips**

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## CLASS REGISTRATION STATUS REPORT

The *Class Registration Status* report checks whether or not students have registered for a class. The report shows all selected students, whether or not they are enrolled in the course, whether or not they are registered (or waitlisted) for a class, who registered the student, and the class start date.

➡ **To create the report**

1. On the **Reports** tab, click **Class Registration Status**. The *Class Registration Status* page appears.
2. Click **Select a Course** to select a course for the report. You will be able to search courses that contain either a live or virtual class. The *Browse for a Course* page appears.
3. Conduct a course search. You can search alphabetically, by category, or whole word or partial word + wildcard.
4. Click **Search**. The system returns a listing of all courses that match your search criteria.
5. Click the name link of the desired course. You are returned to the *Class Registration Status* page with the name of the course that you selected next to **Course**.
6. Click **Select a Class Template (learning activity) from the course**. The *Browse for Course Learning Activities* page appears.
7. Click the name link of the desired class template. You are returned to the *Class Registration Status* page with the name of the class template that you selected next to **Class Template**.

8. In **Students**, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. See *Selecting a Student Group for a Report* and *Searching for Students for a Report*. Note that:

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If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group.

9. In **Creation Date Range**, in the **From** and **Through** boxes, enter the dates during which you want to search.

10. In **Classes to Include**, select **First Session Start Date within Range (classes in which the first session start date falls within the date range)** or **Any Session Start Date within Range (multi-session classes falls within the date range)**.

11. In **Students to Include**, select **All Students**, **Registered Students Only**, or **Registered & Waitlisted Students** (for example, exclude non-registered students).

12. In **Display Options**, select the **Include User ID**, **Include Job Title**, and/or **Group by Department** check boxes.

13. In **Sort By**, select **Last Name**, **Enrollment Status**, **Registration Status**, or **Class Start Date**.

14. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

- You can also click the calendar icon to select dates.

## CLASS ROSTER AND SIGN-IN SHEET

The *Class Roster and Sign-In Sheet* report creates a roster for a class - whether already scheduled or not previously scheduled - including space for student signatures. The report features option to print portrait or landscape - for extra width.

### ➡ Creating a Roster for an Existing Class Scheduled in the system:

#### TO CREATE A ROSTER FOR AN EXISTING CLASS SCHEDULED IN THE SYSTEM

1. On the **Reports** tab, click **Class Roster and Sign-In Sheet**. The *Class Roster and Sign-In Sheet* page appears.

2. Click **Select a Class**. The *Search for Classes* page appears.

3. Enter desired search criteria. You may or may not, depending on your organizational hierarchy, be able to search additional affiliations by clicking **Search Affiliations**. (See Searching for Affiliations for a Report for more information.) You are returned to the *Search for Classes* page with the affiliation(s) that you selected in the **Class Affiliation** box. You may also filter your search by **Grading Status: Any, Grading Complete (Hidden), or Grading Not Complete (Visible)**. Selecting the **Grading Complete for This Class** check box when grading a class automatically moves the class to **Hidden** status.
4. Click **Search**. A list of all classes meeting your specified search criteria will appear.
5. Click the name link of the desired class. You are returned to the *Class Roster and Sign-In Sheet* page with the class that you selected next to **Class Title**.
6. In the **Printed Comments** box, enter any comments that you would like to appear on the sign-in sheet.
7. In **Print Orientation**, select **Portrait 8.5 x 11 in** or **Landscape 11 x 8.5in**.
8. In **Display Options**, select the **Include User ID, Include Job Title, and/or Include Department** check boxes. Note: Easy Scan customers can also select to include a barcode for scanning the roster sheet.
9. In **Sort By**, select **Last Name, Department Name, or User ID**.
10. Click **Continue**. The report appears in a new window.

#### **CREATING A ROSTER FOR A CLASS THAT WAS NOT PREVIOUSLY SCHEDULED**

1. On the **Reports** tab, click **Class Roster and Sign-In Sheet**. The *Class Roster and Sign-In Sheet* page appears.
2. Click **Edit Summary Information** to add the class information. The page refreshes to include the summary information. The information added here for this roster is not saved.
3. In the **Class Title** box, enter a title for the class.
4. In the **Start Date** and **End Date** boxes, enter the start and end dates for the class.
5. In the **Start Time** and **End Time** boxes, enter the starting and ending times for the class.
6. In the **Building** box, enter the name of the building in which the class takes place.
7. In the **Instructor(s)** box, enter the name(s) of the instructor(s) for the class.
8. In **Students**, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. See Selecting a Student Group for a Report and Searching for Students for a Report for more information.
9. In the **Printed Comments** box, enter any comments that you would like to appear on the sign-in sheet.
10. In **Print Orientation**, select **Portrait 8.5 x 11 in** or **Landscape 11 x 8.5in**.

11. In **Display Options**, select the **Include User ID**, **Include Job Title**, and/or **Include Department** check boxes. Note: Easy Scan customers can also select to include a barcode for scanning the roster sheet.

12. In **Sort By**, select **Last Name**, **Department Name**, or **User ID**.

Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- This report can be accessed directly from Class Management screens (Education tab) for any class that has students registered in it.
- You can also click the calendar icon to select dates.

## COMPLETION DATA EXPORT REPORT

The *Completion Data Export* report allows an administrator to export system data into Microsoft Access. Then it can then be used to create custom queries and reports from a selected date range (up to 92 days).

Note: Microsoft Access is an independent application and requires the user to have a solid understanding of its functionality. The HLC does not provide support for MS Access. The Completion Data Export report is functional with Microsoft Access 2003 and newer.

### ➡ To create the report

1. On the **Reports** tab, click **Completion Data Export**. The *Completion Data Export* page appears.
2. In the **Completion Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the months in the boxes. The default is **Last Quarter**.
3. In **Data To Include**, select the **Course CE Credit Tables**, **Class Tables (live and virtual)**, and/or **Student Tables (completed students)** check boxes. The **Course Tables** check box always remains selected by default.
4. Select the **Enable Password for Zip File** check box if you wish to password protect the .zip file output. When this check box is selected, the **Zip Password** and **Confirm Zip Password** fields appear.
5. Enter an identical password into the **Zip Password** and **Confirm Zip Password** fields. The password you enter will be required to open the .zip file output from your completion data export. The password is case-sensitive. If the report is scheduled, the same password will be required to open the .zip file each time the report is generated. Only the .zip file is password protected. Once the .zip file is opened, the .mdb file (MS Access) contained within is not password protected.

6. Click **Continue**. The following page appears, with a message indicating the report request will be submitted to Request Manager for processing. The **Request Manager** link is accessed from the **Reports** tab. See *Scheduling a Report* for more information.
7. In the **Request Name** box, change the name of the request, if desired. The default name is that of the report: **Completion Data Export**.
8. In the **E-mail Address** box, change the address that appears or add additional addresses separated by semicolons. The default e-mail address is that of the administrator currently logged on.
9. Click **Continue**. The following page displays a message confirming the request has been submitted successfully. A link to the report will be e-mailed to the address provided in the **E-mail Address** box. (The report is also accessible from Request Manager for 14 days after it has been created.)

### TO SAVE THE REPORT FROM REQUEST MANAGER

1. On the **Reports** tab, click **Request Manager**. The *Request Manager* page appears.
2. Ensure that the status of the report is **Complete**.
3. Click **View**. The *File Download* window appears.
4. Click **Open** to launch the file, or click **Save** to save the file and open it at a later time.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## COURSE ACTIVITY REPORT

The *Course Activity* report provides data about the number of completions by month for specified courses within a specified timeframe. The report also provides a statistical summary of completions, including total completions, highest completion month and the monthly completion average.

If there is more than one month with the same number of highest course completions, the first month will appear in the report statistics.

### ➡ To create the report

1. On the **Reports** tab, click **Course Activity**. The *Course Activity* page appears.
2. In **Report Focus**, select **Courses** or **Departments**.

- **Courses** focus lists selected courses and associated completion statistics.
  - **Departments** focus lists selected departments and course completion totals for selected courses. When generated at the Enterprise level, **Departments** focus is replaced by **Affiliations**, allowing the administrator to search the hierarchy or select all affiliations within the hierarchy.
3. In **Start Date**, select the range of dates that you want to use in the report. You can select the date range from the list, or specify how many months back you want the report to begin collecting data. The report will generate 12 months of completion data beginning with the selected start date.
  4. In **Courses**, select the **Report on All Courses** check box if you want the report to include all available courses, click **Select Courses from an Assignment** to search for and include all courses within a specified assignment, or click **Search for Courses** to search for and select specific courses. See *Selecting Courses from an Assignment for a Report* and *Searching for Courses for a Report* for more information.
  5. In **Departments**, select the **Select All** check box if you want the report to use all departments or select the check boxes to the left of each individual department you want included in the report.
  6. Click **Show Additional Options** to view the following additional report options:
    - In **Report Criteria**, select **Summary** (default) or **Detailed Appendix**.
    - In **Completions to Include**, select **Only Completions that occurred within this Institution** (default) or **All Completions**.
    - In **Completion Types**, select **All Courses** (default), **Assigned only**, or **Elective Learning only**.
    - In **Students**, select **All Students** (default), **Active Students only**, or **Inactive Students only**.
    - In **Sort by**, select **Name** (default) or **Total Completions (Descending)**.
  7. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- Because the report opens in a new window, you can return to the report configuration page and edit your report criteria to create another report. Or, you can quickly switch between the various focus options to create variations of the report.
- The **Unique Students Included** statistic refers to the unique students included in the departments that were selected.

## COURSE CERTIFICATES REPORT

The Course Certificates report generates certificates of completion or CE certificates associated with a course, including the option to narrow the date range for course completions.

### To create the report

1. On the **Reports** tab, click **Course Certificates**. The *Course Certificates* page appears.
2. Click **Select a Course** to select the course for the report. The *Browse for a Course* page appears.
3. Conduct a course search. You can search alphabetically, by category, or whole word or partial word + wildcard.
4. Click **Search**. The system returns a listing of all courses that match your search criteria.
5. Click the name link of the desired course. You are returned to the *Course Certificates* page with the name of the course that you selected next to **Course**.
6. In **Date Range**, in the **From** and **Through** boxes, enter the start and end dates for the course.
7. In **Certificates**, select **Certificates of Completion** or **CE Certificates**.
8. Click **Continue**. The report appears in a new window. A page break is automatically inserted between certificates for more convenient printing.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## COURSE COMPLETION REPORT - DRILL-THROUGH

The *Course Completion – Drill-Through* report lists students who have either completed or not completed any of the selected learning items, or lists all students regardless of their completion status. This includes any assigned or elective instances of the selected learning items. The data can be based upon all completion types or filtered to assigned completions or elective completions.

The report cannot show students who are incomplete for assigned learning. To report on students who are incomplete for assignments, use the *Assignment Completion* or *Delinquent/Past Due* reports.

Since this report is not directly associated with assignments (as the *Assignment Completion* reports are), there is no reference to **Completed On-Time**, **Completed Late**, or **Delinquent**. It can be used by institutions who choose not to use assignments or it can be advantageous to look at a department or student group to see at a glance who has completed a particular learning item within a given time period. Learning events are not included in this report unless they are used to satisfy a course in the course catalog.

### To create the report

1. On the **Reports** tab, click **Course Completion Drill-Through**. The *Course Completion Drill-Through* page appears.

2. In **Students to Include**, select **All Selected Students**, **Students with Completions only**, or **Incomplete Students only**.
3. In **Learning to Include**, select **All Learning**, **Assigned Learning only**, or **Elective Learning only**. When you select **Assigned Learning only** or **Elective Learning only**, the **Students to Include** setting is set to **Students with Completions only**.
4. In the **Completion Date Range** list, select the range of dates that you want to use in the report, or enter the months in the **From** and **Through** boxes. The default is **Last 12 Months**. The report will look for instances of the selected learning items that were completed within this range.
5. In **Learning**, select the **Report on All Learning** check box if you want the report to include all available learning items, click **Select an Assignment** to search for and include all learning items within a specified assignment, or click **Search for Courses, Curricula, or Equivalents** to search for and select specific learning items. (See *Selecting an Assignment for a Report* and *Searching for Courses, Curricula, or Equivalents for a Report* for more information about these processes.) You are returned to the *Course Completion – Drill-Through* page with the learning items that you selected in the **Learning** box. If you select an assignment and there are learning items and students associated with that assignment, then the learning items appear in the **Learning** box and the associated students appear in the **Students** box.
6. In **Students**, select the **Report on All Active Students** check box if you want the report to include all active students, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. (See *Selecting a Student Group for a Report* and *Searching for Students for a Report* for more information related to these processes.) You are returned to the *Course Completion – Drill-Through* page with the students that you selected in the **Students** box. Note that:
  - You may include inactive students by using search criteria. However, inactive students cannot belong to a student group.
  - If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group.
7. In **Report Size**, select **Complete Report** or **Summary Only**. The summary produces the top-level page of the report only.
8. In **Presentation**, select **Standard Report** or **Data Tables Only**. **Standard Report** includes report headers. **Data Tables Only** includes the tabled data and is suitable for use in spreadsheet and database applications.
9. In **Display Criteria**, select **Summary** or **Detailed Appendix**.
10. In **Display Options**, select the **Include Student User ID** check box if you want to include the user ID in the report.
11. In **Sort Department Detail By**, select **Student Name**, **Job Title**, or **Completion Date**.

12. In the **Sort Course Detail By**, select **Student Name** or **Completion Date**.

13. Click Continue. The report appears in a new window.

### ★ Tips

- You can also click the calendar icon to select dates.
- Because the report opens in a new window, after you close the window you can edit your report criteria and create another report.
- The **Unique Students Selected** statistic refers to the number of unique students that were selected in the **Student** section of the criteria selection page.

## COURSE COMPLETION REPORT - SCHEDULABLE

The *Course Completion – Schedulable* report lists students who have completed any of the selected learning items or lists all students regardless of their completion status. This includes any assigned or elective instances of the selected learning items. The data can be based upon all completion types or filtered to assigned or elective completions.

The report cannot show students who are incomplete for assigned learning items. To report on students who are incomplete for assignments, use the *Assignment Completion* or *Delinquent/Past Due* reports.

Since this report is not directly associated with assignments (as the *Assignment Completion* reports are), there is no reference to **Completed On-Time**, **Completed Late**, or **Delinquent**. It can be used by institutions who choose not to use assignments or it can be advantageous to look at a department or student group to see at a glance who has completed a particular learning item(s) within a given time period. Learning events are not included in this report unless they are used to satisfy a course in the course catalog.

### ➡ To create the report

1. On the **Reports** tab, click **Course Completion - Schedulable**. The *Course Completion - Schedulable* page appears.
2. In the **Report Order** list, select the order in which you want the data to appear in the report.
3. In **Students to Include**, select **All Selected Students**, **Students with completions only**, or **Incomplete Students only**.
4. In **Completion Types**, select **All Courses**, **Assigned Learning only**, or **Elective Learning only**. When you select **Assigned Learning only** or **Elective Learning only**, the **Students to Include** setting is set to **Show only those with completions**.
5. In the **Completion Date Range** list, select the range of dates that you want to use in the report, or enter the months in the **From** and **Through** boxes. The default is **Current Year**. The report will look for instances of the selected courses that were completed within this range.
6. In **Courses**, select the **Report on All Courses** check box if you want the report to include all available courses, click **Select Courses and Students from an Assignment** to search for and include all courses within a specified assignment, or click **Search for Courses** to search for and select specific courses. See

Selecting Courses and Students from an Assignment for a Report and Searching for Courses for a Report for more information.

7. In **Students**, select the **Report on All Active Students** check box if you want the report to include all active students, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. See *Selecting a Student Group for a Report and Searching for Students for a Report* for more information. Note that:
  - You may include inactive students by using search criteria. However, inactive students cannot belong to a student group.
  - If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must select and create a profile student group.
8. In **Display Options**, select the **Include Student User ID** check box if you want to include the user ID in the report.
9. In **Format Options**, select **Include Page Break** after each group if you want a page break between groups.
10. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- Because the report opens in a new window, after you close the window you can edit your report criteria and create another report.
- You can also click the calendar icon to select dates.

## DELINQUENT/PAST DUE - DRILL-THROUGH REPORT

The *Delinquent/Past Due - Drill-Through* report finds students who are delinquent or past due for assigned learning. The administrator selects the courses, curricula, equivalents, students, and due date range. Students who are found with a due date within the date range but with no corresponding completion will be displayed on the report with their due date. If a completion has been recorded subsequent to the due date, the completion date will be provided as information for the reader.

This report is tied to assignments; therefore, an assignment is required to create a context for the report.

Delinquent implies that a student cannot complete the learning item after the due date. Past Due implies that a student can complete the learning item after the due date. This is dependent upon the type of assignment and how it has been configured.

This report offers three sorting options. Because reports open in a new window, you can easily return to the report user interface, change the **Sort By** option, and regenerate the report using the same settings.

### REPORT OPTIONS

- **Score Completed Late As:** For students who complete a learning item after the due date, you have the option of how they will be scored on the report.
- **Completed On Time:** Students are not included in the report.
- **Delinquent:** Students will be included among delinquent students.
- **Show Detailed Department Summary:** When the Departments focus is selected, the *Summary* page of the report shows the delinquent learning items each department has (from the selected learning).
- **Sort Course Detail By:** When the **Courses, Curricula, or Equivalents Detail** focus is selected, the Course Details page can be sorted by user ID or department.
- **Due Date Range:** The report will look for instances of the selected learning with due dates within this range. This range is inclusive of the **From** and **Through** dates.
- **Assignment Criteria option:** In addition to searching for individual courses, curricula, or equivalents, you can select a single assignment's learning items and students. The learning items and student group(s) appearing in an assignment will populate the **Learning** and **Students** section of your report criteria. You will still need to specify the due date range. The assignment's due date is not automatically inserted in the report criteria.

### To create the report

1. On the **Reports** tab, click **Delinquent/Past Due Drill-Through**. The *Delinquent/Past Due Drill-Through* page appears.
2. In **Report Focus**, select **Courses** or **Departments**.
3. In **Score Completed Late As**, select **Completed On Time** or **Delinquent**.
4. In **Due Date Range**, in the **From** and **Through** boxes, enter the dates for which you want to generate the report. The report will look for instances of the selected courses with due dates within this range.
5. In **Items**, click **Select an Assignment** to search for and include all items within a specified assignment, or click **Search for Courses, Curricula, or Equivalents** to search the catalog. See *Selecting an Assignment for a Report* and *Searching for Courses, Curricula, or Equivalents for a Report* for more information about these processes. If you select an assignment and there are learning items and students associated with that assignment, then the learning items appear in the **Items** box and the associated students appear in the **Students** box.
6. In **Students**, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. See *Selecting a Student Group for a Report* and *Searching for Students for a Report*.
7. In **Presentation**, select **Standard Report** or **Data Tables Only (no headers)**. **Standard Report** includes report headers. **Data Tables Only (no headers)** includes the tabled data and is suitable for use in spreadsheet and database applications.
8. In **Display Criteria**, select **Summary** or **Detailed Appendix**.

9. In **Display Options**, select the **Show User ID**, **Show Department**, and/or **Show Job Title** check boxes.
10. In **Sort Course Detail By**, select **User ID** or **Department**.
11. In **Sort Order**, select **Ascending** or **Descending**.
12. Click Continue. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.
- Because the report opens in a new window, after you close the window you can edit your report criteria and create another report, or you can quickly switch between **Courses** focus and **Departments** focus to create variations of the report.

## DELINQUENT/PAST DUE - SCHEDULABLE REPORT

The *Delinquent/Past Due - Schedulable* report finds students who are delinquent or past due for assigned learning. The administrator selects the courses, curricula, equivalent, students, and due date range. Students who are found with a due date within the date range but with no corresponding completion will be displayed on the report with their due date. If a completion has been recorded subsequent to the due date, the completion date will be provided as information for the reader.

This report is tied to assignments; therefore, an assignment is required to create a context for the report. (Learning events are not included in this report as they are not assigned.)

**Delinquent** implies that a student cannot complete the learning item after the due date. **Past Due** implies that a student can complete the learning item after the due date. This is dependent upon the type of assignment and how it has been configured.

### SORTING OPTIONS

This report offers several sorting options. Because reports open in a new window, you can easily return to the report user interface, change the **Sort By** option, and regenerate the report using the same settings.

- **Department, Manager, Student, Item:** Data is sorted first by department, then by manager, then by students in each department and each learning item per student (based on report criteria).
- **Manager, Department, Student, Item:** Data is sorted first by manager, then by department, then by students in each department and each learning item per student (based on report criteria).
- **Item, Manager, Department, Student:** Data is sorted first by learning items (based on report criteria), then by manager, then by department, and then each student assigned the learning item.
- **Item, Department, Manager, Student:** Data is sorted first by learning item (based on report criteria), then departments where the learning item was assigned, then by manager, then by student.

### IMPORTANT OPTIONS

- **Due Date Range:** The report will look for instances of the selected learning with due dates within this range. This range is inclusive of the **From** and **Through** dates.
- **Assignment Criteria option:** In addition to searching for individual courses, curricula, or equivalents, you can select a single assignment's learning items and students. The learning items and student group(s) appearing in an assignment will populate the **Learning** and **Students** section of your report criteria. You will still need to specify the due date range. The assignment's due date is not automatically inserted in the report criteria.

### **To create the report**

1. On the **Reports** tab, click **Delinquent/Past Due - Schedulable**. The *Delinquent/Past Due - Schedulable* page appears.
2. In the **Sort By** list, select how you want the report data sorted.
3. In the **Due Date Range** list, select the range of due dates of the forms you want to use in the report, or enter the dates in the **From** and **Through** boxes. The default date range is **Current Year**.
4. In **Items**, click **Select an Assignment** to search for and include all items within a specified assignment, or click **Search for Courses, Curricula, or Equivalents** to search the catalog. See *Selecting an Assignment for a Report* and *Searching for Courses, Curricula, or Equivalents for a Report* for more information about these processes. If you select an assignment and there are learning items and students associated with that assignment, then the learning items appear in the **Items** box and the associated students appear in the **Students** box.
5. In **Students**, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. See *Selecting a Student Group for a Report* and *Searching for Students for a Report*.
6. In **Display Options**, select the **Include User ID** check box if you want to include the user ID in the report.
7. In **Format Options**, select **Include Page Breaks** or **Do Not Include Page Breaks (Excel-Compatible)**.
8. Click **Continue**. The report appears in a new window.

### **Tips**

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page. See *Scheduling a Report*.
- You can also click the calendar icon to select dates.

- Because the report opens in a new window, after you close the window you can edit your report criteria and create another report, or you can quickly switch between **Courses** focus and **Departments** focus to create variations of the report.

## ENTERPRISE ASSIGNMENT COMPLETION REPORT

The *Enterprise Assignment Completion* report provides high-level completion statistics for courses, curricula, and equivalents delivered to students using the Enterprise Assignment feature. To access this report, you must be logged on at a level above the institution level (for example, the Enterprise Level). You can click each learning item on the report to view the status of each affiliation relative to that item.

### ➔ To create the report

1. On the **Reports** tab, click **Enterprise Assignment Completion**. The *Enterprise Assignment Completion* page appears.
2. In the **Due Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the months in the **From** and **Through** boxes. The default is **Last 12 Months**.
3. In **Affiliations**, click **Search the Hierarchy...** to search for one or more affiliations in the organizational hierarchy. See *Searching for Affiliations for a Report*. You are returned to the *Enterprise Assignment Completion* page with the affiliations that you selected in the **Affiliations** box.
4. In **Learning**, select the **Report on All Assigned Learning to Students Selected** check box if you want the report to include all available courses, curricula, and equivalents from this level of the system that are assigned to the selected students, click **Select an Assignment** to search for and include all courses within a specified assignment, or click **Search for Courses, Curricula, or Equivalents** to search for and select specific courses. See *Selecting an Assignment for a Report* and *Searching for Courses, Curricula, or Equivalents for a Report* for more information about these processes. You are returned to the **Enterprise Assignment Completion** page with the learning items that you selected in the **Learning** box. If you select an assignment and there are learning activities and students associated with that assignment, then the learning activities appear in the **Items** box and the associated students appear in the **Students** box.
5. In **Students**, select the **Report on All Active Students** in the **Selected Affiliations** check box if you want the report to include all active students, click **Select Enterprise Student Groups** to search for and include a student group, or click **Search for Students** to search for and select specific students. See *Selecting a Student Group for a Report* and *Searching for Students for a Report* for more information. You are returned to the **Enterprise Assignment Completion** page with the student groups or students that you selected in the **Students** box. Note that:
  - Inactive students do not have assignments and are therefore not included in this report.
  - If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must select and create a profile student group.

6. In **Score Not Yet Due As**, select **Not Yet Due** (default), **Completed On-Time**, **Delinquent**, or **Not Assigned**. The report will contain the students' scores in the header. See *Scoring Not Yet Due Students in Assignments-based Reports*.
7. In **Presentation**, select **Standard Report** or **Data Tables Only (no headers)**. **Standard Report** includes report headers. **Data Tables Only (no headers)** includes the tabled data and is suitable for use in spreadsheet and database applications.
8. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.
- Because the report opens in a new window, you can return to the report configuration page and edit your report criteria to create another report. Or, you can quickly switch between the various focus options to create variations of the report.

## ENTERPRISE COURSE ACTIVITY REPORT

The *Enterprise Course Activity* report provides data about the number of completions by month for specified courses within a specified time frame. The report also provides a statistical summary of completions, including total completions, highest completion month and the monthly completion average.

If there is more than one month with the same number of highest course completions, the first month will appear in the report statistics.

### 🔄 To create the report

1. On the **Reports** tab, click **Enterprise Course Activity**. The *Enterprise Course Activity* page appears.
2. In **Report Focus**, click **Courses** or **Affiliations**. **Courses** focus lists selected courses and associated completion statistics. **Affiliations** focus lists selected affiliations (for example, institutions) and course completion totals for selected courses. When generated at the institution level, affiliations focus is replaced by departments, allowing the administrator to view statistics at the department level.
3. In **Start Date: 12 months beginning**, select the range of dates that you want to use in the report. You can specify the date range from the lists for month and year, or specify how many months back you want the report to begin collecting data by entering the number of months in the **Months Ago** box. The report will generate 12 months of completion data beginning with the specified start date.
4. In **Courses**, select the **Report on All Courses** check box if you want the report to include all available courses, click **Select Courses from an Assignment** to search for and include all courses within a specified enterprise assignment, or click **Search for Courses** to search for and select specific courses. See

Selecting Courses from an Assignment for a Report and Searching for Courses for a Report for more information. You are returned to the *Enterprise Course Activity* page with the courses that you selected in the **Courses** box.

5. In **Affiliations**, click **Search the Hierarchy...** to search for one or more affiliations in the organizational hierarchy. See Searching for Affiliations for a Report. You are returned to the *Enterprise Course Activity* page with the affiliations that you selected in the **Affiliations** box.
6. Click **Show Additional Options** if you wish to further define your report configuration; otherwise, proceed to step 11. If you choose to add additional criteria, the *Enterprise Course Activity* page refreshes to include additional fields.
7. In **Report Criteria**, select **Summary** (default) or **Detailed Appendix**.
8. In **Completion Types**, select **All Courses** (default), **Assigned only**, or **Elective and Enrolled only**.
9. In **Students**, select **All Students** (default), **Active Students only**, or **Inactive Students only**.
10. In **Sort by**, select **Name** (default) or **Total Completions (Descending)**.
11. Click **Continue**. The report appears in a new window.

#### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- Because the report opens in a new window, you can return to the report configuration page and edit your report criteria to create another report. Or, you can quickly switch between the various focus options to create variations of the report.

## ENTERPRISE COURSE COMPLETION REPORT

The *Enterprise Course Completion* report provides completion counts for courses, curricula, and equivalents that students have completed at the selected affiliations. To access this report, you must be logged on at a level above the institution level (for example, the Enterprise Level).

#### ➔ To create the report

1. On the **Reports** tab, click **Enterprise Course Completion**. The *Enterprise Course Completion* page appears.
2. In **Students To Include**, select **Active** (default selection), **Inactive**, or both **Active** and **Inactive**.
3. In the **Completion Date Range**, enter the dates in the **From** and **Through** boxes.
4. In **Affiliations**, click **Search Affiliations** to search for one or more affiliations in the organizational hierarchy. See Searching for Affiliations for a Report. You are returned to the *Enterprise Course Completion* page with the affiliations that you selected in the **Affiliations** box.

5. In **Learning**, click **Select Courses, Curricula, or Equivalents** to search for and select specific courses. See Searching for Courses, Curricula, or Equivalents for a Report. You are returned to the *Enterprise Course Completion* page with the affiliations that you selected in the **Learning** box.
6. In **Group By**, select **Institution** (default selection) or **Learning. Institution** lists institutions first with the corresponding learning items. **Learning** lists each course, curriculum, or equivalent with the corresponding affiliations.
7. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.
- Because the report opens in a new window, you can return to the report configuration page and edit your report criteria to create another report. Or, you can quickly switch between the various focus options to create variations of the report.

## EVALUATION SCORES BY COURSE REPORT

The *Evaluation Scores* report provides a view of aggregate data from evaluations completed by students. Data include evaluation item answers, counts and percentages. Student identities are not exposed, preserving anonymity of evaluation responses. Specific evaluations within a course can be selected, as well as evaluations where override permissions exist. While all question types are selected by default, specific question types can be selected to narrow the report results. Free-text questions are summarized on the main report page, and a drill-down feature allows for viewing of response detail. Question group names will be visible in the report.

If only one student has responded, the report will not be generated.

All questions delivered within an evaluation are mandatory.

### 🔄 To create the report

1. On the **Reports** tab, click **Evaluation Scores by Course**. The *Evaluation Scores by Course Report* page appears.
2. Click **Select a Course** to select the course for the report. The *Browse for a Course* page appears. Available courses include those that were published at your affiliation and courses created at a higher level and were published to your affiliation. Only courses that contain one or more evaluations will be returned in search results.
3. Conduct a course search. You can search alphabetically, by category, or whole word or partial word + wildcard.
4. Click **Search**. The system returns a listing of all courses that match your search criteria.

5. Click the name link of the desired course. You are returned to the *Evaluation Scores by Course Report* page with the name of the course that you selected next to **Course**.
6. In the **Course Version** list, select the course version. The default is the active version. Because an evaluation may be different or even missing between course versions, this report does not span across course versions.
7. If there is more than one evaluation learning activity within the course, click **Select an Evaluation** to select the evaluation and, if applicable, the evaluation override on which to report. If the course contains one evaluation and no overrides, the system will automatically select the available evaluation. The *Evaluation Override Selector* page appears.
8. Select the evaluation you want to use in the navigation tree to the left.
9. Click **Continue**. You are returned to the *Evaluation Scores by Course Report* page with the test that you selected next to **Evaluation Name**.
10. In the **Completion Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the dates in the **From** and **Through** boxes. The default is **Last 12 Months**. If a student completes the same evaluation more than once within the completion date range, each completed evaluation will be included in the report.
11. Click **Show Additional Options** to view the following additional report options:
  - In **Evaluations to Include**, select **Course Completions Only** or **All Completed Evaluations**. **Course Completions Only** returns evaluation data from only students who have completed the selected course is selected. **All Completed Evaluations** includes evaluation data from students who have completed the evaluation, but not the course.
  - In **Questions to Include**, all questions are selected by default. Clear any of these check boxes to filter the report, but at least one must be selected.
  - In **Disciplines to Include**, all disciplines are selected by default; even students who do not have a license will be included in the report. Clear any of these check boxes to filter the report, but at least one must be selected.
  - In **Display Options**, select the **Include Responses from Inactive Students** check box if you want to include responses from inactive students as well as active students. Do not select this box if you want to include responses from active students only. *Note: The report will include evaluation data from all students within the selected institution even if they completed the evaluation at another institution within the organization. If a student is now affiliated with the reporting institution and meets the selected discipline and active/inactive student criteria, his or her evaluation responses will be included.*
  - In **Sort Responses By**, select **Presentation Order** (default) or **Percent of Students Responding**. **Presentation Order** shows predefined responses in the order in which they were presented to the student. **Percent of Students Responding** shows predefined responses in order according to the number of times each was selected, from most to least.
12. Click **Continue**. The report appears in a new window. If there is only one unique student in the report results, you will be prompted to expand your report criteria to preserve student anonymity.

If the evaluation questions or responses include images, the images will be rendered in the report. If the image cannot be rendered, it will display with the broken image icon (red X). Also, editing a question or answer will reset the question's report calculations to zero in this version of the course. Consider creating an *Evaluation Scores by Courses Report* before proceeding if you wish to preserve that data.

★ **Tips**

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## FAILED COURSES REPORT

The Failed Courses report provides a view of all students who have failed selected courses.

➡ **To create the report**

1. On the **Reports** tab, click **Failed Courses**. The *Failed Courses* page appears.
2. In **Report Focus**, select **Courses** or **Departments**. If you select **Courses**, students are listed per course. If you select **Departments**, students are listed by department with their respective courses.
3. In **Failed Date Range**, in the **From** and **Through** boxes, enter the dates for which you want to generate the report. The report will look for all instances of failures that occurred within this date range for the courses selected.
4. In **Courses**, click **Select Courses and Students from an Assignment** to search for and include all courses within a specified assignment, or click **Search for Courses** to search for and select specific courses. See *Selecting Courses and Students from an Assignment for a Report* and *Searching for Courses for a Report* for more information about these processes.
5. In **Students**, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. See *Selecting a Student Group for a Report* and *Searching for Students for a Report* or more information about these processes.. You may include inactive students by using search criteria. However, inactive students cannot belong to a student group.
6. In **Presentation**, select **Standard Report** or **Data Tables Only (no headers)**. **Standard Report** includes report headers. **Data Tables Only (no headers)** includes the tabled data and is suitable for use in spreadsheet and database applications.
7. In **Display Criteria**, select **Summary** or **Detailed Appendix**.
8. In **Display Options**, select the **Include User ID** check boxes if you want to include the user ID on the report.
9. Click **Continue**. The report appears in a new window.

### ★ Tips

- You can also click the calendar icon to select dates.

## INSTRUCTOR CLASS SCHEDULE REPORT

The Instructor Class Schedule report allows you to view the schedule of classes for a specific instructor.

### ➔ To create the report

1. On the **Reports** tab, click **Instructor Class Schedule**. The *Instructor Schedule* page appears.
2. Click **Select an Instructor** to select an instructor for the report. The *Select Instructor* page appears.
3. In the **Last**, **First**, and **Middle** boxes, enter the name(s) of the instructor(s) for whom you want to search.
4. In the **User ID(s)** box, enter the user ID(s) of the instructor(s) for whom you want to search.
5. Click **Search**. The results appear in the **Search Results** box. Clicking **Search** without entering a search term will return all instructors in the system.
6. In the **Search Results** box, click the name of the instructor that you want to use for the report. You are returned to the *Instructor Schedule* page with the name of the instructor that you selected next to **Instructor**.
7. In **Date Range**, in the **From** and **Through** boxes, enter the dates for which you want to generate the report. The default date range is today's date through the next 60 days.
8. In **Class Type**, select **All Types**, **Live Class Only**, or **Virtual Class Only**.
9. In **Sort By**, click **Class Name**, **Course Name**, or **Class Start Date**.
10. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## LEARNING PROGRESS REPORT

The *Learning Progress* report tracks student progress toward the completion of enrolled and assigned courses, curricula, and equivalents. The report includes details to the level of learning activities within courses.

The administrator selects a course, curriculum or equivalent, the enrollment dates, and students or student groups. Students who have been assigned a learning item but have not enrolled in it will not appear on the report. Enrollment occurs when a student clicks on the name of a course, curriculum or equivalent on the *My Learning* page. Enrollment for courses or equivalents within a curriculum occurs when the student clicks the **Enroll** button from the *Curriculum*

*Details* page. Enrollment for the courses in an equivalent occurs when a student clicks the **Enroll** button for the course from the *Equivalent Details* page.

### **To create the report**

1. On the **Reports** tab, click **Learning Progress**. The *Learning Progress* page appears.
2. Click **Select a Course, Curriculum, or Equivalent**. The *Learning Progress Report Browse* page appears.
3. Search for the desired item by typing the item name, or browse for the item using the **Alphabetical** or **Category** search. The check boxes for **Course, Curriculum, and Equivalent** are selected by default. Clear the check box for items to be excluded from the search.
4. Click **Search**. A list of items matching your search criteria appears.
5. Select the link for a course, curriculum, or equivalent to be used in the report. The system returns you to the *Learning Progress* page. The selected item appears on at the top of the page in the **Name** box.
6. In the **Enrollment Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the dates in the **From** and **Through** boxes. The default is the last 12 months.
7. In **Students**, select the **Report on All Active Students** check box if you want the report to include all active students, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. See *Selecting a Student Group for a Report and Searching for Students for a Report* for more information on these processes. If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group.
8. Click **Show Additional Options** to view the following additional report options:
  - In **Status**, select any or all of the **Not Yet Started In Progress, Completed, and Failed** check boxes. All boxes are selected by default.
  - In **Display Options**, select any or all of the **Include Student ID, Include Student Department, Include Job Title, and Include Inactive Students** check boxes. User ID and job title are displayed on the Student Detail layer (department is always displayed on this layer). All boxes are selected by default.
9. Click **Continue**. The report appears in a new window.

### **Tips**

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## NO-SHOW REPORT

The No-Show report allows you to view students who were graded as No-Show for a selected class.

### To create the report

1. On the **Reports** tab, click **No-Show**. The *No-Show* page appears.
2. Click **Select a Class**. The *Search for Classes* page appears.
3. Enter desired search criteria. You may or may not, depending on your organizational hierarchy, be able to search additional affiliations by clicking **Search Affiliations** (see Searching for Affiliations for a Report). You are returned to the *Search for Classes* page with the affiliation(s) that you selected in the **Class Affiliation** box. You may also filter your search by **Grading Status**. Note that selecting the **Grading Complete for This Class** check box when grading a class automatically moves the class to **Hidden** status.
4. Click **Search**. A list of all classes meeting your specified search criteria will appear.
5. Click the name link of the desired class. You are returned to the *No-Show* page with the class that you selected next to **Class Name**.
6. In **Display Options**, select **Include Inactive Students** or **Include User ID**.
7. In **Sort By**, select **Student Name**, **Department**, **Job Title**, or **User ID**.
8. Click **Continue**. The report appears in a new window.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

## TEST QUESTION ANALYSIS REPORT

The *Test Question Analysis* report allows viewing of aggregate responses to test questions in courses. The report displays the number of responses and the percentages of each response, providing a tool for analyzing course content presentation and test effectiveness. Individual student responses are not revealed in the report.

### To create the report

1. On the **Reports** tab, click **Test Question Analysis**. The *Test Question Analysis* page appears.

2. Click **Select a Course** to search for the course that contains the test upon which you wish to report. The *Browse for a Course* page appears. Available courses include those that were published at your affiliation and courses created at a higher level and were published to your affiliation. Only courses that contain one or more tests will be returned in search results.
3. Conduct a course search. You can search alphabetically, by category, or whole word or partial word + wildcard.
4. Click **Search**. The system returns a listing of all courses that match your search criteria.
5. Click the name link of the desired course. You are returned to the *Test Question Analysis* page with the name of the course that you selected next to **Course**.
6. In the **Course Version** list, select the course version. The default is the active version. Because a test may be different or even missing between course versions, this report does not span across course versions.
7. If there is more than one test within the course, click **Select a Test** to select the test and, if applicable, the test override on which to report. The *Test Override Selector* page appears.
8. Select the test you want to use in the navigation tree to the left.
9. Click **Continue**. You are returned to the *Test Question Analysis* page with the test that you selected next to **Test Name**.
10. In the **Completion Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the dates in the **From** and **Through** boxes. The default is **Last 12 Months**.
11. In **Sort Responses By**, select **Presentation Order** (default) or **Percent of Students Responding**. **Presentation Order** displays results in order as questions appear on the test. **Percent of Students Responding** displays results in order of percentage, from highest to lowest.
12. Click **Continue**. The report appears in a new window.

If the test questions or responses include images, the images will render in the report. If the image cannot render, it will display with the broken image icon (red X). If you wish to display an Alt Tag for an image in the report, that information must be added to the image itself within the test question or response. See the [Rad Editor End User Manual](#) for more information.

Editing a test question or answer will reset the question's report calculations to zero in this version of the course. Consider creating a *Test Question Analysis* report before proceeding if you wish to preserve that data.

#### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## TEST SCORES REPORT

The Test Scores report displays student test scores. You can also view test questions and students' answers. This report can be scheduled. See [Scheduling a Report](#) for more information about scheduling reports.

## RUNNING THE REPORT

### To run the Test Scores report:

1. Click the **Reports** tab to open the Reports page.
2. Click the **Test Scores Report** link to open the criteria selection page.
3. Select a course or test to include on the report.
  - 3.1. Click the **Select a Course** or **Select a Test** link to open The Browse for a Course or Browse for a Test page.
  - 3.2. Type a keyword in the text box.
  - 3.3. Click the **Search** button.
  - 3.4. From the search results, click a course or test name to select it and return to the criteria selection page.
    - If you search for a test, the version number of the course with which it is associated appears in the **Version** column.
    - If you select a course, all of the tests in that course will be listed on the criteria selection page. If you want to exclude one of the listed tests, clear the check box next to its name.
    - If you select a course, the report will display information for the *latest version* only.
4. Select students to include on the report. If you need to run the report for all active students, select the **Report on All Active Students** check box. Otherwise,
  - 4.1. Click the **Select a Student Group** or **Search for Students** link to open the Search Student Groups or Search Student(s) page.
  - 4.2. Enter search criteria.
  - 4.3. Click the **Search** button.
  - 4.4. From the search results, select the check box next to the students or student groups that you want to include on the report.

- 4.5. Click the **Select** button to select the students or student groups and return to the criteria selection page.
  - If you selected student groups, they will be listed on the criteria selection page. If you want to exclude one of the listed groups, clear the check box next to its name.
5. Select a date range for the report.
  - You can select a predefined date range from a list or enter dates in the **From** and **Through** boxes to define a custom date range.
  - Click the calendar icon [  ] to open the date picker tool.
  - If you select a predefined date range, be sure that the button in front of the list is selected. It should look like this:  . If the button is not selected, click it to select it.
  - If you define a custom date range, be sure that the button in front of the **From** box is selected. It should look like this:  . If the button is not selected, click it to select it.
6. Click the **Continue** button to open the report in a new browser window.

A summary of all the tests included in the report appears at the top of the page. Below the summary are details for each test, including each student who took the test and his or her score. You can click a test name in the summary section to go directly to that test's details. Students who took the test more than once during the report date range can appear multiple times. There can be differences in **Min. Score to Pass** and **Attempts Allowed** columns because the report includes data from all versions of the test.

If you are using Internet Explorer 7 or earlier, report text may not align properly.

## WORKING WITH THE REPORT

### ➔ To view the settings that you used to run the report:

Click the **View Report Settings** link at the top of the page.

### ➔ To view a student's answers:

Click a student's name to open a page that displays the test questions and the student's answers. If the student took the test more than once during the report's date range, you can click the number in the **Attempt Number** column to see the answers that he or she gave for that test attempt.

- Click the **Hide Correct Answers** button to hide the correct answers.
- Click the **Hide Test Images** button to hide images.
- Click the **Return to Summary** button to return to the main Test Scores report page.

### ➔ To print the report:

1. Click the **Print** button to open a print dialog.
2. If necessary, adjust the print settings.
3. Click **Print**.

### To export the report:

Exporting is not supported in Internet Explorer 7 and earlier.

1. Click the **Export** button to open an options panel, which displays the available formats.
2. Click a format name.
3. When you are prompted to open or save the export file, click **Open** or **Save** as needed.

## TOP 10 COMPLETIONS

The *Top 10 Completions* report provides a view of the top 10 courses, curricula, or equivalents completed within the specified month and year.

The top ten completions returned includes completions from inactive students. Students who have been acquired from one institution to another are counted only once.

### To create the report

1. On the **Reports** tab, click **Top 10 Completions**. The *Top 10 Completions* page appears.
2. In the **Period** list, select the time frame for which you want to generate data in the report. You can select any month or all months.
3. In the **Year** list, select the year for which you want to generate the report. Choices include 2003 through the current year.
4. In the **Learning to Include** list, select the types of learning items to be included in the report: **Courses**, **Curricula**, and/or **Equivalents**. By default, **Courses** is selected.

Click **Continue**. The report appears in a new window.

## TRAINING HOURS SUMMARY REPORT

The *Training Hours Summary* report allows you to view cumulative training hours per month based on a selected range of months for specified courses and students at the administrator's institution. Training hours are based upon the estimated completion times that have been assigned to HealthStream or third-party content, as well as the estimated completion times entered for each learning activity within an administrator-developed course. (See Adding a Learning Activity.)

The estimated completion times factored into the *Training Hours Summary* report are only those estimations for completed learning activities. If, for example, a student successfully completes a course with three learning activities by meeting the minimum passing score on a pre-test, only the estimated time associated with the pre-test will be recorded.

Not all previously-completed courses are included estimated completion times. Also, administrator-developed courses to which estimated completion times were not applied to learning activities cannot be calculated for students who have already completed the courses. Editing learning activities to include estimated completion times and re-publishing the courses will not update course completions.

### To create the report

1. On the **Reports** tab, click **Training Hours Summary**. The *Training Hours Summary* page appears.
2. In the **Group and Sort** list, select **Department/Month** (default) or **Month/Department**.
3. In the **Completion Month Range** list, select the range of months that you want to use in the report. You can select the month range from the list, or enter the months in the **From** and **Through** boxes. The default is **Year To Date**. If the current month is selected, then data through the previous day will be presented in the report.
4. In **Courses**, select the **Report on All Courses** check box if you want the report to include all available courses, click **Select Courses and Students from an Assignment** to search for and include all courses within a specified assignment, or click **Search for Courses** to search for and select specific courses. See *Selecting Courses and Students from an Assignment for a Report* and *Searching for Courses for a Report*.
5. In **Students**, select the **Report on All Students** check box if you want the report to include all students, click **Select a Student Group** to search for and include a student group, or click **Search for Students** to search for and select specific students. See *Selecting a Student Group for a Report* and *Searching for Students for a Report*.
6. Click **Show Additional Options** to view the following additional report option:
  - In **Completions to Include**, select either **Only completions that occurred within this Affiliation** (default) or **All Completions**. If you select **Only completions that occurred within this Affiliation**, then the report will not show any course completions or times for a student who completed courses at another institution in your organization. If you select **All Completions**, then all course completion times appear in the report, even for a student who completed courses at another institution in your organization.
7. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

## UPCOMING CLASSES REPORT

The *Upcoming Classes* report allows you to view a schedule of upcoming classes (regardless of instructor). Classes can be displayed by upcoming date, or grouped first by course name.

### To create the report

1. On the **Reports** tabs, click **Upcoming Classes**. The *Upcoming Classes* page appears.
2. In **Affiliation**, the currently selected affiliation appears. If you wish to change it, click **Select an Affiliation...** to search for one or more affiliations in the organizational hierarchy. See *Searching for Affiliations for a Report*. You are returned to the *Upcoming Classes* page and the affiliation that you selected appears next to **Affiliation**.
3. In **Date Range**, in the **From** and **Through** boxes, enter the dates for which you want to generate the report. The default date range is today's date through the next 7 days.
4. In **Class Types**, select **All Types**, **Live Classes**, or **Virtual Classes**.
5. In **Class Registrations**, select **Show All**, **Classes with Spaces Available Only**, or **Full Classes Only**.
6. In **Display Options**, select the **Group by Course** check box if you want to group the report data by courses. If you do not select the box, then the report will show classes by date first, and then sort by class name.
7. Click **Continue**. The report appears in a new window.

If a class begins on the **Through** date and ends after the **Through** date, it will be included in the report. Multi-session classes will be displayed with a link. Clicking the link will display all class dates.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## MOC PROGRESS REPORT

The MOC Progress report provides information on students' progress in a selected Maintenance of Competency (MOC) curriculum. This report can be scheduled.

### To run the MOC Progress report:

1. From the **Reports**, tab, click the **MOC Progress** link (under the *Education Reports* heading) to open the criteria selection page.
2. Select a report method option.
  - Selecting the *Students Behind Schedule* option will return students who have overdue learning items in the curriculum.

- Selecting the *Students Approaching the End of a Learning Schedule* option will return students who are approaching the end of their current MOC curriculum schedule with incomplete courses.
3. Select the MOC curriculum for which you want to run the report.
    - 3.1. Click the **Search for MOC Curriculum** link to open the *Browse for an MOC Curriculum* page.
    - 3.2. Search for the curricula for which you want to run the report. You can search by keyword, by category, or alphabetically.
    - 3.3. From the search results, select the check box next to the curricula that you want to include on the report.
    - 3.4. Click the **Select** button to select the curricula and return to the criteria selection page.
  4. Select students or [student groups](#) to include on the report.
    - If you want to include all active students, select the **Report on All Active Students** check box.
    - Click the **Select a Student Group** link to search for student groups.
    - Click the **Search for Students** link to search for students.
    - Student searches allow you to search for inactive students; however, inactive students cannot belong to a student group.
    - If you select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group.
  5. Select a **Sort By** option.
  6. Select a **Sort Direction** option.
  7. If you selected the *Students Approaching the End of a Learning Schedule* report method option, you can specify a date range for the report, either by selecting a predefined range from a list, or by typing dates in the **From** and **Through** boxes. This defines the range in which the current assignment period ends.
  8. Click the **Continue** button to run the report.

## TOOLS REPORTS

The following reports are available from the Tools Reports section of the Reports tab. These reports generally support features and information relative to the Tools tab.

### DAILY BUILDING SCHEDULE REPORT

The *Daily Building Schedule* report allows you to view all the scheduled classes and, if desired, equipment for a selected date for a specific building.

#### To create the report

1. On the **Reports** tab, click **Daily Building Schedule**. The *Daily Building Schedule* page appears.
2. In the **Date** box, enter the date for the report. The report will look for all classes scheduled for that date.
3. Click **Select a Building** to select a building to be included in this report. The *Search Buildings/Resources* page appears.
4. Enter search criteria. If desired, you can limit the search to the institution to which you are logged in by clicking the **Search This Institution Only** check box.
5. Click **Search**. All buildings meeting the entered search criteria appear at the bottom of the page, including the building name, associated institution, the date the building was last updated, and by whom it was updated.
6. Select the check box to the left of the building you want to include in the report.
7. Click **Continue**. You are returned to the *Daily Building Schedule* page with the building that you selected next to **Building**.
8. In **Display Options**, clear the **Include Equipment** check box if you do not want the report data to include equipment used in the class.
9. In **Sort By**, select **Start Time**, **Room Name**, or **Class Name**.
10. Click **Continue**. The report appears in a new window.

#### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

### DAILY EQUIPMENT SCHEDULE REPORT

The Daily Equipment Schedule report allows you to view all the scheduled resources for a selected date for a specific building.

 **To create the report**

1. On the **Reports** tab, click **Daily Equipment Schedule**. The *Daily Equipment Schedule* page appears.
2. In the **Date** box, enter the date for the report. The report will look for all classes scheduled for that date.
3. Click **Select a Building** to select a building to be included in this report. The *Search Buildings/Resources* page appears.
4. Enter search criteria. If desired, you can limit the search to the institution to which you are logged in by selecting the **Search This Institution Only** check box.
5. Click **Search**. All buildings meeting the entered search criteria appear at the bottom of the page, including the building name, associated institution, the date the building was last updated, and by whom it was updated.
6. Select the check box to the left of the building you want to include in the report.
7. Click **Continue**. You are returned to the *Daily Equipment Schedule* page with the building that you selected next to **Building**.
8. In **Display Options**, select the **Include Resource Notes/Special instructions**, **Include Resource Required Accessories**, and/or **Include Resource Optional Accessories** check boxes.
9. In **Sort By**, select **Class Session Start Time**, **Class Name**, or **Room Name**.
10. Click **Continue**. The report appears in a new window.

 **Tips**

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## DAILY ROOM SCHEDULE REPORT

The Daily Room Schedule report allows you to view all the scheduled classes for a selected date for a specific room.

 **To create the report**

1. On the **Reports** tab, click **Daily Room Schedule**. The *Daily Room Schedule* page appears.
2. In the **Date** box, enter the date for the report. The report will look for all classes scheduled for that date.
3. Click **Select a Room** to select a room to be included in this report. The *Browse for Resource* page appears.

4. Enter search criteria.
5. Click **Search**. All resources meeting the entered search criteria appear at the bottom of the page.
6. Click the name of the resource you want to include in the report. You are returned to the *Daily Room Schedule* page with the resource that you selected next to **Room**.
7. In **Display Options**, select the **Include Class Equipment** check box if you want the report data to include equipment used in the class.
8. In **Sort By**, select **Start Time** or **Class Name**.
9. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.
- You can also click the calendar icon to select dates.

## DEPARTMENT LISTING

The *Department Listing* report allows you to view all departments.

### 🔄 To create the report

1. On the **Reports** tab, click **Department Listing**. The *Department Listing* page appears.
2. In **Sort By**, select **Department Code** or **Department Name**.
3. Click **Continue**. The report appears in a new window.

### ★ Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

## DEPARTMENT UTILIZATION REPORT

The *Department Utilization* report allows you to view how selected departments are associated with annotations, assignments, profile student groups, students, and administrators.

If you're unable to delete a department, this report will show you where the department is still in use. A department must be disassociated with all of these items before it can be deleted. A department cannot be deleted if:

- A course, curriculum, or equivalent has been published specifically to the department.

- A course has override permissions granted to the department (even if no overrides exist).
- The department has at least one course override.

 **To create the report**

1. On the **Reports** tab, click **Department Utilization**. The *Department Utilization* page appears.
2. In the **Department** list, select a department for the report.
3. In **Administrators**, clear the **Include Department-Specific Administrators** check box if you do not want the report data to include department administrators.
4. In **Students**, clear the **Include Students in selected Job Title**, **Include User ID**, and/or **Include Department** check boxes for those options you do not want the report data to include.
5. In **Students to Include**, select **All**, **Active Only**, or **Inactive Only**. The default is **All**.
6. In **Sort Students By**, select **Student Name**, **User ID**, or **Job Title**. The default is **Student Name**.
7. Clear the **Include Assignments for Selected Department** check box if you do not want to include assignments for the selected department in the report. If you select this check box, then in **Assignment to Include**, select **All**, **Visible Only**, or **Hidden Only**. The default is **All**.
8. In **Student Group Options**, clear the **Include Student Groups with Selected Department** check box if you do not want to include student groups in the report with the selected department.
9. In **Student Group to Include**, select **All**, **Visible Only**, or **Hidden Only**. The default is **All**.
10. In **Learning**, clear the **Include Courses, Curricula or Equivalents Published to Selected Department** check box if you do not want the report data to include courses published to the selected department.
11. In **Annotations**, clear the **Include Annotations made for Selected Department** check box if you want the report data to include annotations that were made for the selected department.
12. In **Classes**, clear the **Include Classes with Selected Department** check box if you want the report data to include courses, curricula, or equivalents that are published to the selected department.
13. In **Forms**, clear the **Include Forms with Selected Department** check box if you do not want the report data to include forms that were created for the selected department. (This setting applies to uses of the HCC only.)
14. Click **Continue**. The report appears in a new window.

 **Tips**

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

## JOB TITLE IMPORT RESULTS REPORT

### To create the report

1. On the **Reports** tab, click **Job Titles Import Results**. The *Job Titles Import Results* page appears.
2. In the **Date Range** list, select the range of dates that you want to use in the report. You can select the date range from the list, or enter the dates in the boxes. The default is **Yesterday**.
3. Click **Continue**. The report appears in a new window.

### Tips

- You can also click the calendar icon to select dates.

## JOB TITLE LISTING

The Job Title Listing report allows you to view all job titles.

### To create the report

1. On the **Reports** tab, click **Job Title Listing**. The *Job Title Listing* page appears.
2. In **Sort By**, select **Job Category**, **Job Code**, or **Job Title**.
3. Click **Continue**. The report appears in a new window.

### Tips

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page.

### Related Topics

- [Scheduling a Report](#)

## JOB TITLE UTILIZATION

The *Job Utilization* report allows you to view how selected job titles are associated with annotations, assignments, profile student groups, students, and administrators.

If you're unable to delete a job title, this report will show you where the department is still in use. A job title must be disassociated with all of these items before it can be deleted.

### To create the report

1. On the **Reports** tab, click **Job Title Utilization**. The *Job Title Utilization* page appears.
2. In the **Job Title** list, select a job title for the report.
3. In **Students**, clear the **Include Students in selected Job Title** check box if you do not want to include students with the selected job title, clear the **Show Department** check box if you do not want the department to appear in the report, and/or clear the **Include User ID** check box if you want to include the students' user IDs in the report. The **Include Students in selected Job Title** and **Show Department** check boxes are selected by default.
4. In **Students to Include**, select **All**, **Active**, or **Inactive**. The default is **All**.
5. In **Sort Students By**, select **Last Name**, **User ID**, **Dept Name**, or **Dept Code**. The default is **Last Name**.
6. In **Assignments Options**, clear the **Include Assignment for Selected Job Title** check box if you do not want to include the assignments for the selected job titles.
7. In **Assignments to Include**, select **All**, **Visible**, or **Hidden**. The default is **All**.
8. In **Student Groups Options**, clear the **Include Student Group with Selected Job Title** check box if you do not want to include the student groups with the selected job titles.
9. In **Student Groups to Include**, select **All**, **Visible**, or **Hidden**. The default is **All**.
10. In **Form Options**, clear the **Include Form with selected Job Title** check box if you do not want to include forms that are associated with the selected job title. (This setting applies to uses of the HCC only.)
11. Click **Continue**. The report appears in a new window.

★ **Tips**

- This report can be scheduled. This report opens in a new window. Once you close the window (or return to the configuration page of the report) you will be able to schedule the report using the **Schedule This Report** link found at the top right of page. See *Scheduling a Report*.

## ORGANIZATIONAL HIERARCHY

The Organizational Hierarchy report provides you with a view of the HLC hierarchy of your organization.

🔄 **To create the report**

1. On the **Reports** tab, click **Organizational Hierarchy**. The *Organizational Hierarchy* report appears, listing the **Name (Code)**, **Tier**, **City**, **State**, and **Time Zone** of the organizations within your hierarchy.

## LIVE EVENTS REPORTS

### EVENT EVALUATION SCORES BY INSTRUCTOR REPORT

The Event Evaluation Scores by Instructor report displays the evaluation scores received by a selected instructor at your organization. These are responses received from students who were graded in their instructor led event.

**To run the Event Evaluation Scores by Instructor report:**

1. Click the **Tools** tab to open the Tools page.
2. In the **Event Report** section, click the **Event Evaluation Scores by Instructor** link to open the report criteria selection page.
3. Select the instructor whose evaluation scores you want to see.
  - 3.1. Click the **Search for Instructors** link to open the Search for Instructor(s) page.
  - 3.2. Enter search criteria.
  - 3.3. Click the **Search** button.
  - 3.4. From the search results, click an instructor's name to select him or her and return to the report criteria selection page.
4. If you want to report on all events that the selected instructor led within a specified date range,
  - 4.1. Select the **Report on All Events in a Date Range** check box to display the **Event Date Range** section.
  - 4.2. Either select a predefined date range from the list, or use the **From** and **Through** boxes to specify a custom date range.
  - 4.3. Go to step 6.
5. If you want to report on specific events that the selected instructor led,
  - 5.1. Click the **Search for Events** link to open the Search for Events page.
  - 5.2. Enter search criteria.
  - 5.3. Click the **Search** button.
  - 5.4. From the search results, select the check box next to the events that you want to include on the report.
  - 5.5. Click the **Continue** button to select the events and return to the report criteria selection page.
6. If necessary, change the default **Display Responses from** setting.

7. If there is a **Show Additional Options** link on the page, click it to display additional criteria selection options.
8. If you want to include only certain types of questions on the report,
  - 8.1. In the **Questions to Include** section, clear the **Select All** check box.
  - 8.2. In the **Questions to Include** box, select the check box next to the question types that you want to include on the report.
9. If you want to include only certain disciplines on the report,
  - 9.1. In the **Disciplines to Include** section, clear the **All Students** check box.
  - 9.2. In the **Disciplines to Include** box, select the check box next to the student disciplines that you want to include on the report.
10. If you want to include responses from students who are currently inactive, select the **Include Responses from Inactive Students** check box.
11. If necessary, change the default **Sort Responses By** setting.
12. Click the **Continue** button to run the report and open it in a new browser window.

**To print the report:**

Click the **Print** button to open a Print dialog. Now you can select your print settings and print the report.

**To export the report:**

1. Click the **Export** button to open a list of format options.
2. Click a format option to open a Save File dialog.
  - If you select PDF, a PDF version of the transcript will open in a new browser window.
3. Save the file to your computer.

## **EVENT LISTING REPORT**

The Event Listing report displays a list of live events scheduled within a date range for selected instructors in your organization. The report also displays the number of available spaces and whether there are instructor candidates who are waiting for instructor approval to attend the event.

**To run the Event Listing Report:**

1. Click the **Tools** tab to open the Tools page.
2. In the **Event Reports** section, click the Event Listing link to open the report criteria selection page.
3. Select the instructors for whom you want to run the report.
  - 3.1. If you want to run the report for all instructors in the system, select the **Report on All Instructors** check box and go directly to step 4.
  - 3.2. Click the **Search for Instructors** link to open the Search for Instructor(s) page.
  - 3.3. Enter search criteria.
  - 3.4. Click the **Search** button.
  - 3.5. From the search results, select the check box next to the instructors for whom you want to run the report.
  - 3.6. Click the **Continue** button to select the instructors and return to the report criteria selection page.
4. In the **Date Range** section, use the **From** and **Through** boxes to specify a date range for which to run the report.
5. If necessary, change the default **Event Registrations** and **Group By** settings.
6. If you want to include events outside your organization with the selected instructor(s), select the **Include events outside my organization** check box.
7. Click the **Continue** button to run the report and open it in a new browser window.

**To print the report:**

Click the **Print** button to open a Print dialog. Now you can select your print settings and print the report.

**To export the report:**

1. Click the **Export** button to open a list of format options.
2. Click a format option to open a Save File dialog.
  - If you select PDF, a PDF version of the transcript will open in a new browser window.
3. Save the file to your computer.

## EVENT NO-SHOW

The Event No-Show Report displays a list of learners who have been marked as no-shows for selected Live Events (or all Live Events within a specified date range). Both submitted and non-submitted events can be included on the report.

### To run the Event No-Show report:

1. Click the **Tools** tab to open the Tools page.
2. In the **Event Reports** section, click the **Event No-Show** link to open the report criteria selection page.
3. If you want to report on all events within a specified date range,
  - 3.1. Select the **Report on All Events in a Date Range** check box to display the **Event Date Range** section.
  - 3.2. Either select a predefined date range from the list, or use the **From** and **Through** boxes to specify a custom date range.
  - 3.3. Go to step 5.
4. If you want to report on specific events,
  - 4.1. Click the **Search for Events** link to open the Search for Events page.
  - 4.2. Enter search criteria.
  - 4.3. Click the **Search** button.
  - 4.4. From the search results, select the check box next to the events that you want to include on the report.
  - 4.5. Click the **Continue** button to select the events and return to the report criteria selection page.
5. If necessary, change the default **Display Options** and **Sort By** settings.
6. Click the **Continue** button to run the report and open it in a new browser window.

### To print the report:

Click the **Print** button to open a Print dialog. Now you can select your print settings and print the report.

### To export the report:

1. Click the **Export** button to open a list of format options.
2. Click a format option to open a Save File dialog.
  - If you select PDF, a PDF version of the transcript will open in a new browser window.
3. Save the file to your computer.

## EVENT REGISTRATION STATUS REPORT

The Event Registration Status report displays the registration status of selected students for a selected event.

### To run the Event Registration Status report:

1. Click the **Reports** tab to open the Reports page.
2. Click the **Event Registration Status** link (in the **Live Event Reports** section) to open the Event Registration Status page.
3. Select an event.
  - 3.1. Click the **Select an Event** link to open the Search for Events page.
  - 3.2. Search for the event for which you want to run the report.
  - 3.3. From the search results, click an event name to select it and return to the Event Registration Status page.
4. Select the students whose registration status you want to check.
  - 4.1. Click the **Search for Students** link to open the Search Student(s) page.
  - 4.2. Search for students.
  - 4.3. From the search results, select the check box next to the students you want to include on the report.
  - 4.4. Click the **Continue** button to return to the Event Registration Status page.
5. If necessary, you can repeat step 4 until you have selected all the students whose registration status you want to check.
6. Select a **Students to Include** option.
7. Select an **Instructor Candidates to Include** option.

8. If you want to include additional student information (such as user ID, job title, or department) on the sign-in sheet, select the appropriate check boxes in the **Display Options** section.
9. Select a **Sort By** option.
10. Click the **Continue** button to run the report and open it in a new window.

## EVENT ROSTER AND SIGN-IN SHEET REPORT

The Event Roster and Sign-In Sheet report generates a roster/sign-in sheet for a selected event. If any instructor candidates have registered for the event, only those who have been approved by the instructor will appear on the sign-in sheet.

### To run the Event Roster and Sign-In Sheet report:

1. Click the **Reports** tab to open the Reports page.
2. Click the **Event Roster and Sign-In Sheet** link (in the **Live Event Reports** section) to open the Event Roster and Sign-In Sheet page.
3. Select an event.
  - 3.1. Click the **Select an Event** link to open the Search for Events page.
  - 3.2. Search for the event for which you want to run the report.
  - 3.3. From the search results, click an event name to select it and return to the Event Roster and Sign-In Sheet page.
4. If you want to add comments (such as instructions or other important information) to the sign-in sheet, type them in the **Printed Comments** box. They will appear at the top of the sign-in sheet.
5. Select a **Print Orientation** option.
6. If you want to include additional student information (such as user ID, job title, or department) on the sign-in sheet, select the appropriate check boxes in the **Display Options** section.
7. Select a **Sort By** option.
8. Click the **Continue** button to run the report and open it in a new window.

## ADDITIONAL PROCEDURES FOR CREATING REPORTS

### SELECTING COURSES FROM AN ASSIGNMENT FOR A REPORT

This option provides a quick and easy way to select courses for the report criteria. By default the report is not constrained to the selected assignment, thus all course activity within the specified date range is included. However,

by selecting the **Completion Type** option **Assigned Only**, you can limit the report to completions of the selected assigned courses.

### **To select courses from an assignment for a report**

1. Click **Select Courses from an Assignment**. The *Select Group Assignments* page appears. You may search for assignments using any of the following options (or combination thereof).
  - In the **Name** box, enter the name of the group assignment.
  - In **Assignment Visibility**, click **Visible**, **Hidden**, or **Both**. The system defaults to **Visible**.
  - In **Effective Date Range**, in the **From** and **Through** boxes, enter the dates to find assignment(s) with this effective date.
  - In **Start Date Range**, in the **From** and **Through** boxes, enter the dates to find assignment(s) with this start date.
  - In **End Date Range**, in the **From** and **Through** boxes, enter the dates to find assignment(s) with this end date.
2. Click **Search**. The results appear in the **Search Results** box. Clicking **Search** without entering a search term will return all group assignments with the selected visibility (visible, hidden, or both).
3. In the **Search Results** box, select the check box to the left of the desired group assignment name.
4. Click **Select**. The system returns to the report configuration page with the courses associated with the selected group assignments in the **Courses** box.
5. Clear the check boxes next to any courses that you do not wish to include in the report.

### **Tips**

- You can also click the calendar icon to select dates.

## **SEARCHING FOR COURSES FOR A REPORT**

### **To search for courses for a report**

1. Click **Search for Courses**. The *Browse for a Course* page appears.
2. Search for the desired course by typing the course name, or browse for courses using the **Alphabetical** or **Category** search.
3. Click **Search**. A list of courses matching your search criteria appears.
4. Select the check box(es) next to the course(s) that you want to use in the report.

5. Click **Select**. The system returns to the report configuration page with the courses associated with the selected group assignments in the **Courses** box.

★ **Tips**

- To report on all assigned courses, select the **Report on All Courses Assigned to Students Selected** check box on the report configuration page.

## SELECTING COURSES AND STUDENTS FROM AN ASSIGNMENT FOR A REPORT

This option provides a quick and easy way to select courses and students for the report criteria. The report is not constrained to the assignment, thus all assignments to the students that are due in the date range are included.

➡ **To select courses and students from an assignment for a report**

1. Click **Select Courses and Students from an Assignment**. The *Select Group Assignments* page appears. You may search for assignments using any of the following options (or combination thereof).
2. In the **Name** box, enter the name of the group assignment.
3. In **Assignment Visibility**, click **Visible**, **Hidden**, or **Both**. The system defaults to **Visible**.
4. In **Effective Date Range**, in the **From** and **Through** boxes, enter the dates to find assignment(s) with this effective date.
5. In **Start Date Range**, in the **From** and **Through** boxes, enter the dates to find assignment(s) with this start date.
6. In **End Date Range**, in the **From** and **Through** boxes, enter the dates to find assignment(s) with this end date.
7. Click **Search**. The results appear in the **Search Results** box. Clicking **Search** without entering a search term will return all group assignments with the selected visibility (visible, hidden, or both).
8. In the **Search Results** box, click the group assignment that contains the courses and student groups you want to use in the report. The system returns to the report configuration page with the courses associated with the selected group assignments in the **Courses** box and the associated students or student groups in the **Students** box.
9. Clear the check boxes next to any courses, students, or student groups that you do not wish to include in the report.

If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group. You may clear the check box preceding any previously selected student group name to remove it from your report criteria.

★ **Tips**

- You can also click the calendar icon to select dates.

## SELECTING AN ASSIGNMENT FOR A REPORT

This option provides a quick and easy way to select courses, curricula, equivalents, and students for the report criteria. The report is not constrained to the assignment, thus all assignments to the students that are due in the date range are included.

### To select an assignment for a report

1. Click **Select an Assignment**. The *Select Group Assignments* page appears. You may search for assignments using any of the following options (or combination thereof).
  - In the **Name** box, enter the name of the group assignment.
  - In **Assignment Visibility**, click **Visible**, **Hidden**, or **Both**. The system defaults to **Visible**.
  - In **Effective Date Range**, in the **From** and **Through** boxes, enter the dates to find assignment(s) with this effective date.
  - In **Start Date Range**, in the **From** and **Through** boxes, enter the dates to find assignment(s) with this start date.
  - In **End Date Range**, in the **From** and **Through** boxes, enter the dates to find assignment(s) with this end date.
2. Click **Search**. The results appear in the **Search Results** box. Clicking **Search** without entering a search term will return all group assignments with the selected visibility (visible, hidden, or both).
3. In the **Search Results** box, click the group assignment that contains the courses and student groups you want to use in the report. The system returns to the report configuration page with the courses associated with the selected group assignments in the **Learning** box and the associated students or student groups in the **Students** box.
4. Clear the check boxes next to any courses, students, or student groups that you do not wish to include in the report.

If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group. You may clear the check box preceding any previously selected student group name to remove it from your report criteria.

### Tips

- You can also click the calendar icon to select dates.

## SEARCHING FOR COURSES, CURRICULA, OR EQUIVALENTS FOR A REPORT

### To search for courses, curricula, or equivalents for a report

1. Click **Search for Courses, Curricula, or Equivalents**. The *Browse* page appears with the courses, curricula and equivalents check boxes selected by default. Clear the desired check boxes to limit your search.
2. Search for the desired course, curriculum, or equivalent by typing the name, or browse using the **Alphabetical** or **Category** search.
3. Click **Search**. A list of learning items matching your search criteria appears.
4. Select the check box(es) next to the course, curricula, or equivalents that you want to use in the report.
5. Click **Select**. The system returns to the report configuration page with the selected learning items in the **Learning** box.

★ **Tips**

- To report on all assignments, select the **Report on All Assignments for Students Selected** check box on the report configuration page.

## SELECTING A STUDENT GROUP FOR A REPORT

➡ **To select a student group for a report**

1. Click **Select a Student Group**. The *Search Student Groups* page appears. You may search for student groups using any of the following options (or combination thereof).
  - In the **Student Group Name** box, enter the name of the student group.
  - In **Student Group Visibility**, click **Visible**, **Hidden**, or **Both**. The system defaults to **Visible**.
  - In **Student Group Type**, click **Profile**, **Individual**, or **Both**. The system defaults to **Both**.
  - In **Creation Date Range**, in the **From** and **Through** boxes, enter the dates to find student groups with this creation date.
  - In **Administrator**, in the **Last Name**, **First Name**, and **User ID** boxes, enter the last name, first name, and user ID of the administrator that you want to select.
2. Click **Search**. The results appear in the **Search Results** box. Clicking **Search** without entering a search term will return all students of the selected visibility and type. You can also click the **Alphabetical** link to browse an alphabetical listing of the students.
3. In the **Search Results** box, select the student groups that you want to include in the report by selecting the check boxes to the left of the desired student groups.
4. Click **Continue**. The system returns to the report configuration page with the selected student groups in the **Students** box.

You can only select student groups that contain active students. If you search for and select specific students for the report and use the current report configuration for future scheduled reports, only those students selected in the original configuration will be included. To create a dynamic group of students for scheduled reports, you must create and select a profile student group. You may clear the check box preceding any previously selected student group name to remove it from your report criteria.

### ★ Tips

- You can also click the calendar icon to select dates.

## SEARCHING FOR STUDENTS FOR A REPORT

### ➡ To search for students for a report

1. Click **Search for Students**. The *Search Student(s)* page appears.
2. In the **Last**, **First**, and **Middle** boxes, enter the last, first, and middle names of the student that you want to select.
3. In the **User ID(s)** box, enter the student's user ID.
4. Select which departments, job titles, and job categories you want to search from the appropriate sections.
5. Select whether you want to search according to a student's hire month and date, rehire month and date, review month or day, or active date or month from the appropriate sections.
6. Click **Search**. The results appear in the **Search Results** box. Clicking **Search** without entering a search term will return all students in the system.
7. In the **Search Results** box, select the check boxes next to the students that you wish to include.
8. Click **Continue**. The system returns to the report configuration page with the selected students in the Students box.

### ★ Tips

- You can also click the calendar icon to select dates.

## HEALTHSTREAM ANALYTICS

### HEALTHSTREAM ANALYTICS TRAINING

If your organization has the HealthStream Analytics feature, the Viewer and Editor roles are enabled by default, and a self-instructional course for those roles is published to your organization's course library. The course can then be selected as elective learning from the Catalog tab, or assigned by an administrator. If your organization has not yet implemented HealthStream Analytics, you can view the self-instructional module by clicking [here](#).

If your organization purchases the Designer role, a self-instructional course will be published to your organization's course library, which can be assigned or selected in the same way as any other course.

## **SHOW ME HOW MODULES**

[Editing HealthStream Analytics Reports](#)

[Running, Exporting, and Printing HealthStream Analytics Reports](#)

## **DATA DICTIONARY FOR HEALTHSTREAM ANALYTICS**

The Data Dictionary for HealthStream Analytics contains descriptions of the views and data elements available in reports. Click [here](#) to open the Data Dictionary.

# Students

## ADDING STUDENTS

Students can be added automatically via your regularly-scheduled data import or manually by an administrator. It is recommended that they be added via import file whenever possible. If you have questions about data import, contact your support service.

### To manually add a student:

**Note:** Required fields are noted on-page with an asterisk (\*).

1. On the **People** tab, click **Add a Student**. The *Add a Student* page appears.
2. In the **Last Name**, **First Name**, and **Middle Name** boxes, enter the student's last, first, and middle names.
3. In the **User ID** box, enter the student's user ID, following your institution's procedure for assigning user IDs.
4. In the **Password** box, enter the student's password, following your institution's procedure for password creation. **Note:** Passwords are case-sensitive.
5. In the **Confirm Password** box, retype the password exactly as you did in the **Password** box.
6. In the **Password Reminder** box, enter a phrase that will help the student remember his or her password, if desired.
7. In the **E-mail** box, enter the student's e-mail address if desired. **Note:** For students to receive e-mail notifications, an e-mail address is required.
8. In the **Time Zone** list, select the time zone in which the student works. This value defaults to the institution's time zone. Entering the student's time zone allows the system to synchronize times for classroom and virtual class activities that span more than one time zone. **Note:** Students will see class times adjusted to their time zone. However, assigned courses are always due at 11:59 PM Eastern Time, regardless of the student's time zone.
9. Leave the **Allow this student to access the system** check box selected for active students.
10. Optionally, select the student's supervisor by clicking **Click here to select** beside the **Supervisor/Manager** label. This allows you to select any other student in this institution as the supervisor. **Note:** Your institution may request up to four custom fields be added for additional student demographic data. If added, the custom fields will appear in the **Manage a Student** area below **Supervisor/Manager**. They may appear as lists (required field) or text fields (optional field).
11. In the **Hire/Re-hire Date** box, enter the student's hire or rehire date.
12. In the **Review Month/Day** box, enter the month and day for student review, if desired.

13. In the **Department** list, select the student's department. Departments are sorted by department code (if used).
14. In the **Job Title** list, select the student's job title. Job titles are sorted by job code (if used).
15. In the **Active Date** box, note that the active date defaults to the hire/re-hire date that you entered, but may be adjusted to denote status changes such as department transfers or return from leave of absence.
16. In the **Student Notes** box, enter any notes to the student, if desired. Notes can be edited at any time.
17. In the **Roles** box, note that the *Student* role is selected by default.
18. Click **Save** to save the new student to the system or click **Save and Add Another** if you wish to add another student.

★ **Tips**

- Click [  ] to select the date.

## DESIGNATING SUPERVISORS/MANAGERS

If you wish to utilize the supervisor/manager notifications feature (when available), a supervisor/manager must be identified for your students. You can identify a student's supervisor or manager from the student profile. The Supervisor/manager can also be added through the data import file.

➔ **To manually designate a supervisor/manager:**

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Search for the student for whom you want to designate a supervisor/manager.
3. From the search results, click a student's name to open the *Manage a Student* page.
4. Click the **Click here to select** link (in the *Institution Information* section, next to the *Supervisor/Manager* label) to open the *Select Student Supervisor* page.
5. Search for the student whom you will designate as a supervisor/manager.
6. From the search results, click a student's name to select him or her as the supervisor/manager and return to the *Manage a Student* page.

## SEARCHING FOR STUDENTS

➔ **To search for a student:**

On the **People** tab, click **Manage Students**. The *Manage Students* page appears.

The *Manage Students* page is divided into two sections. The top half of the page enables searching active and/or inactive students by name or user ID. The bottom half of the page is made visible by clicking **Advanced Search** and is used to further define your search.

### PERFORMING A BASIC SEARCH

1. Enter the search criteria. You may search for students by last, first, and middle names, user ID(s), and status. There is no minimum number of characters you must enter into a search field. To narrow search results, simply enter more characters in a search field. You may also enter more than one user ID by separating each with a comma.
2. Click **Search**. The page refreshes, displaying matching search results.
3. Click the name link of the desired student.

### PERFORMING ADVANCED SEARCH

1. Click **Advanced Search** to reveal the bottom half of the search page. This section of the search page contains additional filters, which enable you to further refine your search. You can search for students within specific departments, job categories, job titles, and if available, custom fields. You can also search within specific date ranges. This page defaults to allow you to search through all departments, job categories, and job titles, and all custom filters, if available. If you want to search for a specific department, for example, simply clear the All Departments check box and select the desired check boxes within the Department box.
2. Click **Search**. The page refreshes, displaying matching search results.
3. Click the name link of the desired student.

#### ★ Tips

- Clicking the Recent Items icon displays a list of the ten most recently edited student records.

## VIEWING STUDENT INFORMATION

Administrators can view information about students from the *Manage a Student* page. To access this page, perform a student search.

You can view the following information from the Manage a Student page:

[Assignments](#)

[The To-Do List](#)

[Transcript](#)

[Assignment Report](#)

[Student Groups](#)

[License Information](#)

[Certification Information](#)

[Personal Address and Phone Number](#)

[Education Information](#)

## VIEWING A STUDENT'S ASSIGNMENTS

Administrators can view student assignment information.

### ➔ To view assignment information:

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Click **Assignments** in the left-hand navigation tree. The *View Student Assignments* page appears.
4. This page is divided into four columns: **Item Name**, **Item Type**, **Assignment Type** and **Options**.
5. To see details about an assignment, click the assignment name associated with the selected course, equivalent, or curriculum.
6. To exempt the student from a course that is part of a group assignment, click **Exempt** under the **Options** column.

## VIEWING A STUDENT'S TO-DO LIST

### ➔ To view a student's To-Do List:

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Click **My Learning** from the left-hand navigation tree. The *View Student Learning* page appears.

This view includes up to six sections:

- **Assigned Learning:** including name, due date and status, and last accessed date.
- **Elective Learning:** including name, enrolled by, status, and last accessed date.
- **Institution-Specific Assignments:** including name, institution, due date, and status.
- **Upcoming Classes:** including start date and time, class name, session, status, and options.
- **Choose a Class:** including course name and learning activity.
- **Upcoming Assignments:** including name, due date, status, and available date.

Note: Upcoming assignments are courses that are included in a recurring assignment, that are not yet available under **Assigned Learning** on the student's view of the *My Learning* page, as dictated by the recurrence date.

## VIEWING A STUDENT'S TRANSCRIPT

### To view a student's transcript:

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Click **My Transcript** in the left-hand navigation tree. The *Student Management* page appears. If the course includes continuing education (CE) credit for which the student qualified, the CE credit information will be displayed under the course information, including credit type, units, discipline, license number (if stored in the system) and state. The transcript includes five columns:
  - **Name:** linked to display CE credit information and certificates
  - **Estimated Time:** an estimation of the length of time taken to complete the course (if available) will appear in hrs:mins
  - **Score:** if an overall score was calculated for the course
  - **Completion Date:** the date of course completion
  - **Learning Event Comments:** if the completion was earned via a learning event
  - Administrator-entered or Student-entered notation for learning events. **Note:** *If the transcript includes learning events, the notation - ADMINISTRATOR-ENTERED or STUDENT-ENTERED - will appear to the right of the completion date. Comments entered by the administrator will also be visible beneath the learning event name.*
4. The transcript can be narrowed to a specific date range by selecting a date range from the **Date Range** list. The page will refresh to display the date range chosen.
5. The transcript can be customized and printed as a report by clicking **Customize and Print**.

**Note:** *The student-entered learning events feature is optional and may not be enabled at your institution.*

## PRINTING A STUDENT TRANSCRIPT

Administrators may print a student's transcript from the student's *General Information* page.

### To print a student's transcript:

1. Perform a student search.
2. Click the student's name from the search results. The student's *General Information* page appears.
3. Click the **My Transcript** link from the navigation tree on the left-hand side of the page. The student transcript appears, displaying completions for the last twelve months by default.

4. Click the **Customize & Print** link to further customize the transcript view and print the transcript. Clicking this link will direct you to the Student and Group Transcript report.

## VIEWING A STUDENT'S ASSIGNMENT REPORT

Administrators can view a student's assignment report.

### To view a student's assignment report:

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Click **Assignment Completion Report** from the left-hand navigation tree. The *Student Assignment Completion* page appears.
4. Set the parameters for the Student Assignment Completion report and click **Continue**. The report appears in a new window.

## VIEWING A STUDENT'S STUDENT GROUPS

### To view a student's student groups:

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Click **Student Groups** from the left-hand navigation tree. The *View Student Group Information* page appears, listing student groups to which the student belongs, including the student group name, type, status, and visibility.
4. To view student group details, click the name link of the student group. The *Edit a Student Group* page appears.

## VIEWING A STUDENT'S LICENSE INFORMATION

By default, students who are licensed healthcare professionals can store license and discipline information. Storing this information enables the system to issue appropriate CE credit for course completion.

### To view a student's license information:

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Click **Licenses** from the left-hand navigation tree. The *View Discipline/License Information* page appears.

## VIEWING CERTIFICATION INFORMATION

Students can record any certifications they have earned.

### ➔ To view a student's certification information:

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Click **Certifications** from the left-hand navigation tree. The *View Certifications* page appears.

## VIEWING A STUDENT'S PERSONAL ADDRESS AND PHONE NUMBER

If the student has entered personal address information from the student login, administrators can view this information.

### ➔ To view a student's personal address and phone information:

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Click **Personal Address & Phone** in the left-hand navigation tree. The *Manage Student Mailing Address* page appears.

## EDITING A STUDENT RECORD

Administrators can edit information on the student's general information page. However, if you routinely submit a data import file, it is recommended that all edits be uploaded via the import file. If you do not use an import file, you can manually edit student records as needed.

### ➔ To manually edit a student record:

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Make the desired changes.
4. Click **Save** to save the edits or click **Save and Add Another** if you wish to add another record.

**Note:** By default, you cannot edit a student's user ID. Also, passwords are always encrypted. You cannot view a student's password, but you can reset it.

## INACTIVATING/REACTIVATING A STUDENT

Students cannot be deleted once a student record is created. Students can, however, be inactivated in the system. Inactive students cannot access the system and they will not appear on reports. They will also be removed from all student groups and from classes for which they are registered. Individual assignments remain in place.

**Note:** Students should be inactivated and reactivated via data import file whenever an import file is used to manage student data. If your organization does not import student data, the inactivation and reactivation processes must be performed manually.

### MANUALLY INACTIVATING A STUDENT

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Clear the **Allow this student to access the system** check box.
4. Click **Save**. The student is now inactive in the system.

**Note:** If a student is also an administrator, inactivating the student record does not prevent administrator access to the system. To prevent administrator access, the administrator role must be deleted. All access (including administrator access) can be disabled for all roles when inactivations are facilitated via the data import file instead of inactivated manually.

### MANUALLY REACTIVATING A STUDENT

1. Perform a student search.
2. Click the name link of the desired student from the list of matching search results. The *Manage a Student* page appears.
3. Select the **Allow this student to access the system** check box.
4. Click **Save**. The student is now reactivated and can access the system. Once reactivated, the student is returned to profile student groups for which all criteria are met. The student is not automatically returned to any individual student groups, and is not reregistered for any classes.

#### ★ Tips

- When searching for a student to reactivate, you can use *Inactive* as a search criterion.

## ADDITIONAL STUDENT MANAGEMENT FUNCTIONS

From the *Manage a Student* page, administrators can promote a student to an administrator. From the administrator view of student assignments, administrators can add an individual assignment.

## ACTIVE DATE CHANGES

The purpose of the active date field on the student record is to provide a mechanism by which a student's assignments may be re-set based upon that date. The active date may be utilized to track student status changes including department changes, job title changes, or returns from leave of absence (LOA). It is important to note that all assignment due dates are re-calculated when the active date is changed. The active date can be changed via the data import file or be changed manually on the student's record by an administrator.

New assignment due dates are calculated when the student's designated active date is changed to a date subsequent to his or her hire/re-hire date and there are past due assignments on the *My Learning* page. If the active date is edited for a student record, all assignments will be adjusted based upon the newly entered active date. This action prevents students with status changes (for example, transferring to a new department) from becoming immediately delinquent.

**IMPORTANT:** When you edit a student's active date, any one-time assignments with a fixed due date will be removed from the *My Learning* page if the new active date falls after the assignment due date. Past due assignments from a one-time assignment with a fixed due date are removed from the *My Learning* page. All other assignment due dates are recalculated, and assignments considered past due prior to the edit of the active date will display newly calculated due dates that are subsequent to the active date.

**Note:** *The active date must be set to the hire/re-hire date or a date thereafter. When a student record is imported, the active date is defaulted to the hire/re-hire date unless the active date field is included in the data import. If a subsequent import is received for the same student reflecting a new hire/re-hire date with no active date field, the active date will default to that date.*

Any subsequent import that includes a hire/re-hire date but not an active date will not affect the manually-changed active date, as long as that date is after the hire/re-hire date. Import files that contain active dates will override manual active date changes.

## ADDING EDUCATION INFORMATION TO A STUDENT RECORD

To add education information to a student record:

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Specify the search criteria that you want to use.
3. Click the **Search** button.
4. From the search results, click a student's name to open the *Manage a Student* page.
5. From the left-hand navigation pane, click the **Education** link to open the *View Education* page.
6. Click the **Add Education** link to open the Add Education page.
7. Add the student's education information
  - An asterisk (\*) indicates required information.
  - To select a field of study, type two or more letters in the **Field of Study** box to display a list of fields that include the text that you typed. Then select a field from the list. If you select *Other*, you will be required to enter a field of study description.
  - If the student is still working towards his or her degree, select the **Degree in Progress** check box.

8. Click the **Save** button.

## EDITING A STUDENT'S EDUCATION INFORMATION

### To edit a student's education information:

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Specify the search criteria that you want to use.
3. Click the **Search** button.
4. From the search results, click a student's name to open the *Manage a Student* page.
5. From the left-hand navigation pane, click the **Education** link to open the *View Education* page.
6. Click a degree name to open the education editing screen.
7. Make any necessary edits.
8. Click the **Save** button.

## DELETING EDUCATION INFORMATION FROM A STUDENT RECORD

### To delete education information from a student record:

1. From the **People** tab, click the **Manage Students** link to open the *Manage Students* page.
2. Specify the search criteria that you want to use.
3. Click the **Search** button.
4. From the search results, click a student's name to open the *Manage a Student* page.
5. From the left-hand navigation pane, click the **Education** link to open the *View Education* page.
6. Click a degree name to open the education editing screen.
7. Click the **Delete** link.
8. When prompted to confirm the deletion, click **OK**.

# Student Groups

## STUDENT GROUPS

### STUDENT GROUPS OVERVIEW

Student groups allow administrators to create, edit, and manage defined groups of students. These groups are given a name, and then stored in the system and can be retrieved for purposes of creating assignments, making assignment exemptions, registering students for classes, and generating reports.

Two types of student groups can be created:

- **Profile:** A group of students in which students share common criteria. Students will auto-populate to a profile student group if they meet ALL group criteria, and will be auto-deleted if they no longer match every criterion of the profile.
- **Individual:** A group of students in which students have been selected for inclusion. Students must be added to or deleted from an individual student group by an administrator.

**Note:** Only active students may belong to a student group.

### SEARCHING FOR A STUDENT GROUP

#### ➔ To search for a student group:

1. On the **People** tab, click **Manage Student Groups**. The *Search Student Groups* page appears.
2. Enter search criteria as desired. Available criteria include student group name, visibility, group type, creation date range and administrator. You can also search alphabetically.
3. Click **Search**. A listing of student groups meeting your entered search criteria appear.

### VIEWING STUDENT GROUP ASSIGNMENTS

If assignments have been made to the student group, assignments can be viewed from the student group search.

#### ➔ To view assignments:

1. Search for the student group for which you want to view assignments.
2. From the search results, click **View Assignments** to the right of the desired student group name. **Note:** If no assignments have been made to the selected student group, **View Assignments** is disabled.
3. A listing of assignments made to that group appears, including assignment name, type, last updated date, and updated by (administrator).
4. Click the assignment name to access the assignment editor.

## EDITING STUDENT GROUP CRITERIA

**Note:** *Editing a student group may alter student assignments. For instance, if a student who did not previously meet all criteria for a profile student group prior to the edits now meets all criteria, he or she will now be included in the group and will receive assignments made to that group.*

### To edit student group criteria:

1. Search for the student group that you want to edit.
2. From the search results list, click the **Edit** link next to the group that you want to edit.
3. Make any desired changes on the *Edit a Student Group* page.
4. Click **Save**. The system will begin processing the student group in the background. You can leave the page or close your browser without affecting the process. If you remain on the page, you can check the processing progress by clicking the **Refresh** button to update the percent complete display. When processing is complete, you can view the students who meet the student group criteria.

## COPYING A STUDENT GROUP

Student groups can be copied and edited. This is helpful when you wish to use an existing student group as the basis for another group.

### To copy a student group:

1. Search for the student group that you want to copy.
2. From the search results, click **Copy** to the right of the desired student group name. A new student group appears titled *Copy of [original student group name]* in the *Copy a Student Group* page.
3. Make edits to the new student group (including renaming if desired).
  - You may add or delete students if the copy is an individual student group.
  - You may edit group criteria if the copy is a profile student group.
4. Click **Save**.

## DELETING A STUDENT GROUP

### To delete a student group:

1. Search for the student group that you want to delete.
2. From the search results, click **Delete** to the right of the desired student group name. A confirmation prompt appears.
3. Click **OK** to delete the student group.

**Note:** You cannot delete student groups to which assignments have been made.

## VIEWING MEMBERS OF A STUDENT GROUP

➡ **To view the members of a student group:**

1. Search for the group whose members you want to view.
2. From the search results page, click the name of the group to open the *View Students* page.

## INDIVIDUAL STUDENT GROUPS

### ADDING AN INDIVIDUAL STUDENT GROUP

➡ **To add an individual student group:**

1. On the **People** tab, click **Add a Student Group**. The *Add a Student Group* page appears.
2. In the **Student Group Name** box, enter the name of the new student group.
3. In **Student Group Type**, click **Individual**.
4. In the **Notes** text area, enter any notes regarding the new student group.
5. Select the **Hide this student group from search results** check box if you do not want the new student group to appear in your search of visible groups.
6. Click **Continue**. The *Select Students to Include* page appears.
7. Search for students to include using basic or advanced search functionality.
8. Select the check box to the left of the selected student's name and click **Continue** or click **Check All Current Search Results** to select all students returned by your search. The *View Students* page appears listing students who meet all student group criteria.

**Note:** Additional students can be added to the individual student group by clicking **Add More Students** and conducting a new search.

#### ★ **Tips**

- Click [  ] to use the Spell Check feature.

## CREATING ENTERPRISE-LEVEL INDIVIDUAL STUDENT GROUPS

➡ **To create an enterprise-level individual student group:**

1. From the **People** tab, click the **Add a Student Group** link to open the *Add a Student Group* page.

2. Complete the form. Required fields are indicated by an asterisk (\*).
  - Select the **Enterprise** option under **Student Group Level**.
  - Select the **Individual** option under **Student Group Type**.
3. Click **Continue** to open the *Select Students to Include* page.
4. Specify the criteria to use to search for students.
5. If necessary, specify the institutions in your hierarchy to include in the search.
  - 5.1. Click the **Manage Hierarchy** link to open the *Find affiliation(s)* page.
  - 5.2. Search for institutions by keyword, alphabetically, or by hierarchy tree.
  - 5.3. From the search results, select the check box next to the institutions you want to include in the student search.
  - 5.4. Click the **Select** button to return to the *Select Students to Include* page.
6. Click the **Search** button.
7. From the search results list, select the check box next to the students you want to add to the student group.
8. Click **Continue** to add the students and save the student group.

## ADDING STUDENTS TO AN INDIVIDUAL STUDENT GROUP

**Note:** *Editing a student group may alter assignments. For instance, if you add a student to an individual student group, he or she will now be included in the group and will receive assignments made to that group.*

### **To add students to an individual student group:**

1. Search for the individual student group to which you want to add students.
2. From the search results list, click the group name to open the *View Students* page.
3. Click **Add More Students**. The *Add More Students* page appears.
4. Enter the search criteria. You may search for students by last, first, and middle names, user ID(s), and status. There is no minimum number of characters you must enter into a search field. To narrow search results, simply enter more characters in a search field. You can enter more than one user ID by separating each with a comma. You may also click **Advanced Search** to display more search criteria.
5. Click **Search**. The students that match the search criteria appear in the search results box.

6. In the search results box, select the check boxes next to the students that you want to add or click **Check All Current Search Results** if you want to add all of the students.
7. Click **Continue**. You are returned to the *View Students* page. The students that you selected appear on the page.

**Note:** *Students can be added to an individual student group at any time.*

## DELETING STUDENTS FROM AN INDIVIDUAL STUDENT GROUP

➔ **To delete students from an individual student group:**

1. Search for the individual student group from which you want to delete students.
2. From the search results list, click the group name to open the *View Students* page.
3. Select the **Delete** check box to the right of the desired student.
4. Click **Save**. Assignments made to the student group will be removed from the student's *My Learning* page. Assigned learning that is in progress will become elective learning where the student can choose to complete the learning or un-enroll.

**Note:** *Students can be deleted from an individual student group at any time.*

## PROFILE STUDENT GROUPS

### ADDING A PROFILE STUDENT GROUP

➔ **To add a profile student group:**

1. On the **People** tab, click **Add a Student Group**. The *Add a Student Group* page appears.
2. In the **Student Group Name** box, enter the name of the new student group.
3. In **Student Group Type**, click **Profile**.
4. In the **Notes** text area, enter any notes regarding the new student group.
5. Select the **Hide this student group from search results** check box if you do not want the new student group to appear in your search of visible groups.
6. Click **Continue**. The *Select Students to Include* page appears.
7. Select student criteria based upon **Departments, Job Titles, Job Categories, Date Ranges**, or custom fields, if available. **Note:** *The default for the selection check boxes is All. To make specific selections, clear the **All** check box and select the desired box(es) within the selection window.*

8. Click **Save**. The system will begin processing the student group in the background. You can leave the page or close your browser without affecting the process. If you remain on the page, you can check the processing progress by clicking the **Refresh** button to update the percent complete display. When processing is complete, you can view the students who meet the student group criteria.

★ **Tips**



- Click [  ] to use the Spell Check feature.

## **SPECIFYING THE MEMBERSHIP CRITERIA FOR A PROFILE STUDENT GROUP**

By default, all of the options in the large criteria boxes (**Departments, Job Title**, etc.) are selected, and all of the date boxes are blank. Saving the group without changing these default membership criteria will create a group that includes all students in your institution.

Each of the large criteria boxes has a "select all" check box associated with it (**All Departments, All Job Titles**, etc.). Selecting or clearing these check boxes will select or clear all of the check boxes in the associated large criteria box. This is helpful when you only need to select a few options: you can clear the "select all" check box to clear all of the check boxes in the criterion box, and then select the options that you need.

If you do not need to use any of the options in a criterion box, leave all of the options inside it selected.

Be aware of how the criteria that you select work together to define the group's membership. As mentioned above, the default criteria selection includes all students. When you change any of the default criteria selections, you restrict the group's membership to students whose profile information matches the criteria that you specified. For example, if you select *Laboratory* and *Radiology* from the **Department** criterion box, then your student group will only contain students in the Laboratory and Radiology departments.

When you specify criteria in more than one box, date field, or list, then the student group will only contain students whose profile information matches the criteria in ALL of those boxes, date fields, or lists. For example, if you select *Finance* and *Radiology* from the **Department** criterion box, and *Radiology Assistant* from the **Job Title** box, then the student group will contain only students whose department is Finance or Radiology, AND whose job title is Radiology Assistant. Since there are probably not any radiology assistants in the Accounting department, your student group will probably not contain anyone from Accounting.

If you create a profile student group and find that it does not contain all the students that you think it should, or if you believe that some students have been included who should not have been, check the membership criteria and make sure that they are not too narrow or too wide.

## **CREATING AN ENTERPRISE-LEVEL PROFILE STUDENT GROUP**

Only enterprise administrators can create enterprise-level student groups.

### **To create an enterprise-level student group:**

1. Log on to the system at the enterprise level, if you are not there already.
  - 1.1. Click the institution name link at the top of the page to open the Hierarchy Selector.
  - 1.2. Click the top (enterprise-level) organization name link to log on at the enterprise level.

2. Click the **People** tab to open the People page.
3. Click the **Add a Student Group** link to open the Add a Student Group page.
4. Type a name for the group in the **Student Group Name** box. You cannot use the same name as an existing profile student group.
5. If there are Student Group Level options available, select *Enterprise*.
6. From the Student Group Type options, select *Profile*.
7. If needed, type notes in the **Notes** box.
8. If you want the student group to be hidden from routine search results, select the **Hide this student group from search results** check box. See Hiding Student Groups for more information about hidden student groups.
9. Click the **Continue** button to open the Select Students to Include page.
10. By default, students from all institutions in your organization are included. If needed, you can restrict membership to specific institutions.
  - 10.1. Click the **Select Institutions** link to open the Search Institutions page, which displays the institutions in your organization.
  - 10.2. Select the check box next to the institutions that you want to include.
  - 10.3. Click the **Select** button to return to the Select Students to Include page.
11. By default, students from all departments in the selected institutions are included. If needed, you can restrict membership to specific departments at specific institutions.
  - 11.1. Click the **Select Departments** link to open the Search Department page.
    - 11.2. Search for the departments that you want to include.
      - To search by code, type a department code in the **Code** box and click the **Search** button.
      - To search by name, type a department name in the **Name** box and click the **Search** button.
      - To search alphabetically, click a letter in the **Alphabetical Search** section to display a list of departments whose name begins with that letter (click **#** to display a list of departments whose name begins with a number).
    - 11.3. From the search results, select the check box next to the departments that you want to include.
    - 11.4. Click the **Select** button to return to the Select Students to Include page.

12. By default, all job titles in the selected institutions are included. If needed, you can restrict membership to students with specific job titles at specific institutions.

12.1. Click the **Select Job Titles** link to open the Search Job Titles page.

12.2. Search for the job titles that you want to include.

- To search by code, type a job title code in the **Code** box and click the **Search** button.
- To search by name, type a job title name in the **Name** box and click the **Search** button.
- To search alphabetically, click a letter in the **Alphabetical Search** section to display a list of job titles whose name begins with that letter (click **#** to display a list of job titles whose name begins with a number).

12.3. From the search results, select the check box next to the job titles that you want to include.

12.4. Click the **Select** button to return to the Select Students to Include page.

13. By default, all custom fields in the selected institutions are selected. If needed, you can limit your search to specific custom fields and values at specific institutions.

13.1. Click the **Select Custom Fields** link to open the Search Custom Fields page, which displays the institutions in your organization and the custom fields in use at each one. Clicking the expand button  next to a custom field name displays its possible values.

13.2. Select the check box next to a custom field value to restrict your search to students whose profile contains the selected value.

13.3. Click the **Select** button to return to the Select Students to Include page.

14. By default, all job categories are included. If necessary, you can restrict membership in the student group to those students with specific job categories.

14.1. Clear the **All Job Categories** check box to deselect the items in the **Job Category** box.

14.2. Select the check box next to the job categories that you want to include in the student group.

15. Specify other membership criteria (certification, hire/re-hire date) as needed.

16. Click the **Save** button to create the student group and open the View Students page. The system will begin processing the student group in the background. You can leave the page or close your browser without affecting the process. If you remain on the page, you can check the processing progress by clicking the **Refresh** button to update the percent complete display. When processing is complete, you can view the students who meet the student group criteria.

## EXCLUDING STUDENTS FROM A PROFILE STUDENT GROUP

**Note:** Editing a student group may alter assignments. For instance, if a student who did not previously meet all criteria for a profile student group prior to the edits now meets all criteria, he or she will now be included in the group and will receive assignments made to that group.

### ➡ To exclude students from a profile student group:

1. Search for the profile student group from which you want to exclude student.
2. From the search results list, click the name of the student group to open the *View Students* page.
3. Select the **Exclude** check box to the right of the student you want to exclude.
4. Click **Save**.

**Note:** Students' can be excluded from a profile student group at any time.

## REMOVING EXCLUSIONS FROM STUDENTS' IN A PROFILE STUDENT GROUP

### ➡ To remove exclusions from students' in a profile student group:

1. Search for the profile student group from which you want to remove exclusions.
2. From the search results page, click the name of the student group to open the *View Students* page.
3. Clear the **Exclude** check box to the right of the student you want to restore to the group.
4. Click **Save**.

**Note:** Exclusions can be removed from students in an profile student group at any time.

## CERTIFICATION-BASED STUDENT GROUPS

### CERTIFICATION-BASED STUDENT GROUPS

Certification-based student groups are profile student groups, all of whose members hold the same certification from the same certifying body. Only students who have their certification information entered into the system can belong to certification-based student groups. Students can manage their own certification information through the Certification Management feature. Administrators can manage a student's certification information from the *Manage a Student* page. Certification information can also be managed through a data import file.

## CREATING CERTIFICATION BASED STUDENT GROUPS

### ➡ To create a certification-based student group:

1. From the **People** tab, click the **Add a Student Group** link to open the *Add a Student Group* page.

2. Enter information about the student group.
  - An asterisk (\*) indicates a required field.
  - Select the *Profile* student group type option.
3. Click the **Continue** button to open the *Select Students to Include* page.
4. Select a certifying body from the **Select a Certifying Body** list to display the **Select a Certification** list.
5. Select a certification from the **Select a Certification** list.
6. Specify any other necessary membership criteria.
7. Click the **Save** button. The system will begin processing the student group in the background. You can leave the page or close your browser without affecting the process. If you remain on the page, you can check the processing progress by clicking the **Refresh** button to update the *percent complete* display. When processing is complete, you can view the students who meet the student group criteria.

# AAP NRP, 7th Edition

## THE HEALTHSTREAM LEARNING CENTER™ (HLC) FOR THE AMERICAN ACADEMY OF PEDIATRICS NEONATAL RESUSCITATION PROGRAM® (NRP)®, 7TH EDITION

What do you want to do?

[I want to schedule an instructor-led event.](#)

[I want to schedule a series of instructor-led events.](#)

[I want to edit an instructor-led event.](#)

[I want to delete an instructor-led event.](#)

I want to register students for an instructor-led event.

[I want to drop students from an instructor-led event.](#)

[I want to approve or deny an instructor candidate who has registered for my instructor-led event.](#)

[I want to grade an instructor-led event and submit the grades to the AAP.](#)

[I want to manage event resources.](#)

[I want a guide for providers who will take their curriculum through HealthStream Connect™, and don't have access to online help.](#)

[I want to view the online help for students.](#)

To browse help topics, click the **AAP NRP, 7th Edition** folder in the table of contents on the left side of the window.

## INSTRUCTOR-LED EVENTS

The Event Calendar

### THE EVENT CALENDAR

The Event Calendar displays scheduled instructor-led events.

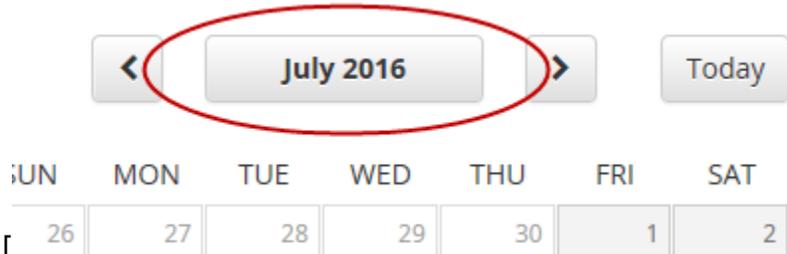
**To access the Event Calendar:**

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.

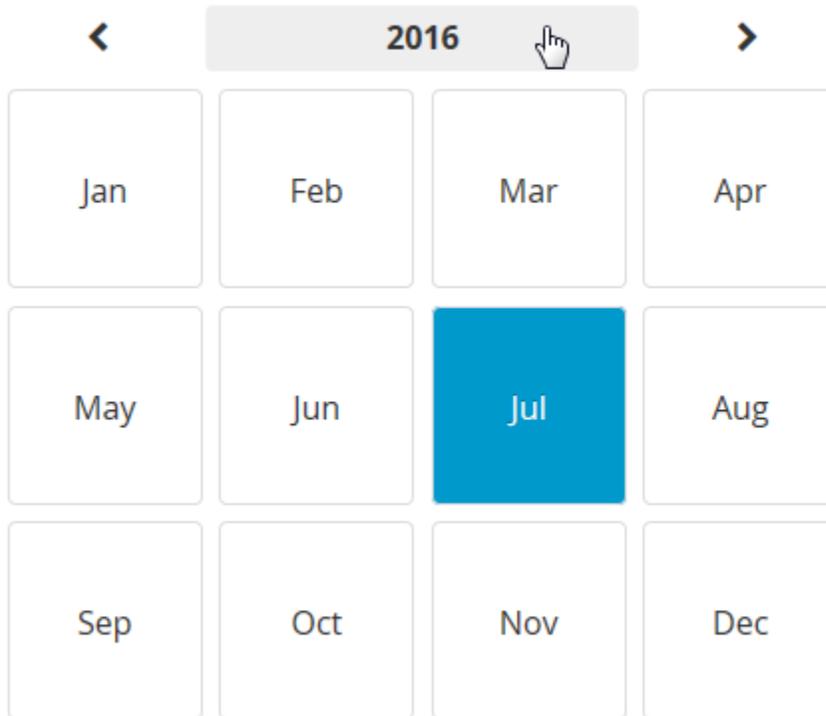
You can use the event calendar filters and search feature to locate instructor-led events.

## CHANGING THE YEAR

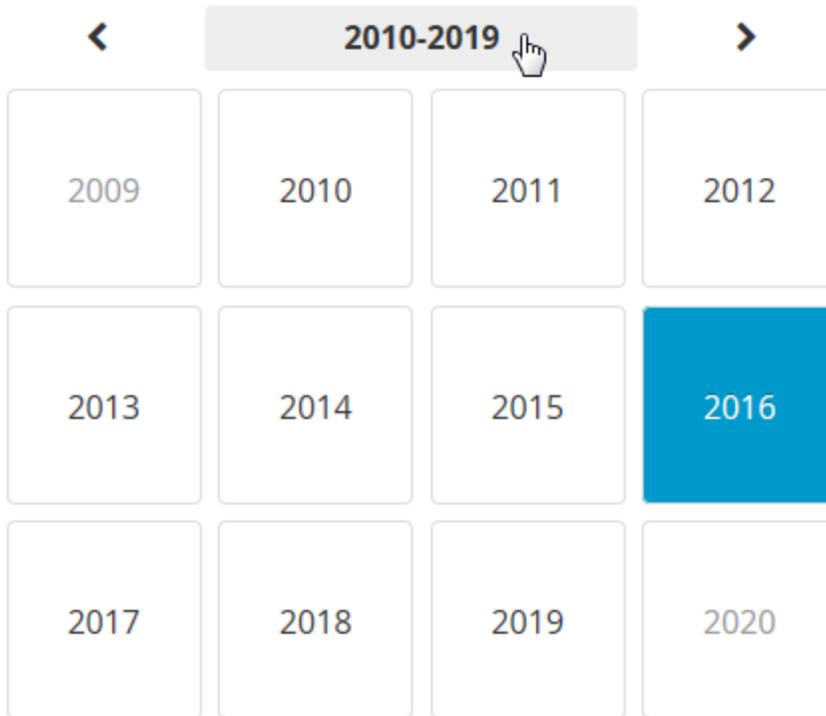
To change the Event Calendar year:



1. Click the current month button [ ] to display the month grid.



2. Click the current year button [ ] to display the year grid.



3. Click a year to select it.

## CHANGING THE MONTH

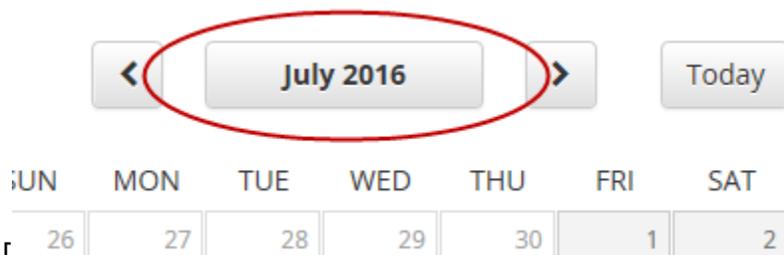
To change the Event Calendar month:

Click the previous month button [  ] to go to the previous month.

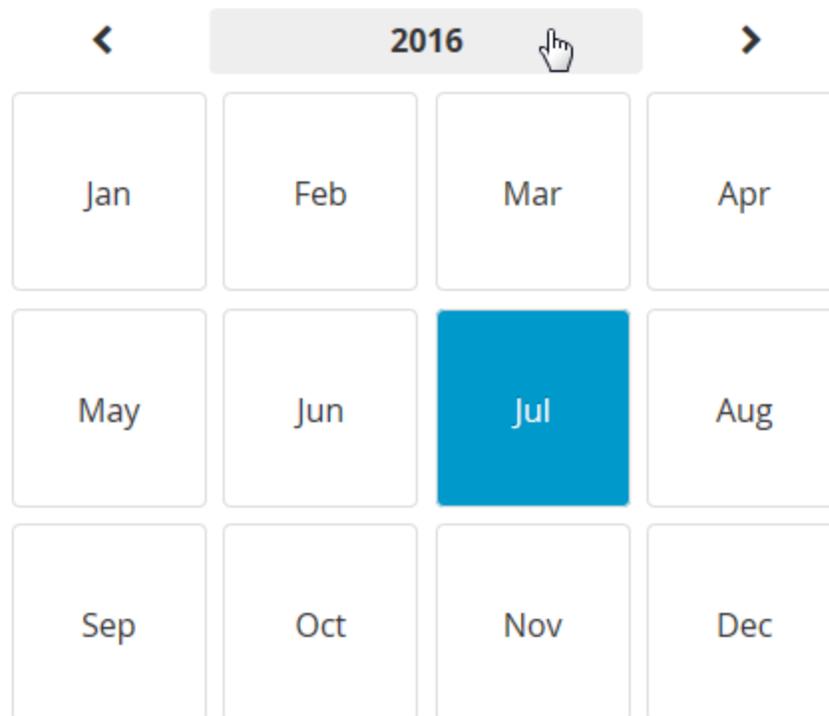
Or

Click the next month button [  ] to go to the next month.

Or



1. Click the current month button [  ] to display the month grid.



2. Click a month to select it.

## SELECTING THE CURRENT DATE

To select the date on the Event Calendar:

Click the **Today** button.

## VIEWING THE INSTRUCTOR-LED EVENTS SCHEDULED FOR A SPECIFIC DATE

To view the instructor-led events scheduled for a specific date:

1. Click the **Scheduling** tab to open the Event Calendar.
2. Change the month and year, if necessary.
  - See [Changing the Month](#) and [Changing the Year](#) for more information about changing the calendar month and year.
3. Click a date on the calendar to display the scheduled events for that date on the right-hand side of the page.
  - See [Agenda View](#) and [List View](#) for more information about changing the calendar view.

## VIEWING THE INSTRUCTOR-LED EVENTS SCHEDULED FOR A SPECIFIC WEEK

1. Click the **Scheduling** tab to open the Event Calendar.
2. Change the month and year, if necessary.
  - See Changing the Month and Changing the Year for more information about changing the calendar month and year.
3. Click the arrow next to a week to select it and display the scheduled events for that week.

The screenshot shows the Event Calendar interface. On the left is a calendar grid for July 2016. The week of July 3, 2016, is selected and highlighted in blue. A red circle highlights the arrow next to this week. On the right is the agenda view for the selected week, showing events for Tuesday, July 05, 2016, and Thursday, July 07, 2016. The events are listed with their times and titles, each with an 'Options' button.

SUN	MON	TUE	WED	THU	FRI	SAT
26	27	28	29	30	1	2
▶ 3	4	5 (1)	6	7 (3)	8	9
▶ 10 (1)	11	12	13	14	15	16
▶ 17	18	19	20	21	22	23
▶ 24	25	26	27	28	29	30
▶ 31	1	2	3	4	5	6

Week of July 3, 2016 (4 Events)

All times displayed in CT [Color Legend](#) Color By: Room

**Tuesday, July 05, 2016**

- 11:00 AM - 1:30 PM NRP Provider Class Options

**Thursday, July 07, 2016**

- 11:00 AM - 12:00 PM NRP 7th Edition Instructor-Led Event Options
- 11:30 AM - 1:30 PM NRP 7th Edition Hands-On Training Options
- 3:00 PM - 4:30 PM NRP 7th Edition Provider Class Options

- See Agenda View and List View for more information about changing the calendar view.

## AGENDA VIEW

The Event Calendar agenda view displays events in agenda format:

**Thursday, July 7, 2016** 3 Events



All times displayed in CT  Color Legend

Color By: Personnel 

Thursday	
6am	
7am	
8am	
9am	
10am	
11am	<div style="display: inline-block; width: 40%;"><p>11:00 - 12:00 NRP 7th Edition Instructor-Led Event</p></div> <div style="display: inline-block; width: 40%; margin-left: 20px;"><p>11:30 - 1:30 NRP 7th Edition Hands-On Training</p></div>
12pm	
1pm	=
2pm	
3pm	<div style="width: 100%;"><p>3:00 - 4:30 NRP 7th Edition Provider Class</p></div>
4pm	=
5pm	
6pm	
7pm	

**To display events in agenda format:**

Click the agenda view button [  ] on the Event Calendar.

## LIST VIEW

The Event Calendar list view displays events in list format:

**Thursday, July 7, 2016** 3 Events  

All times displayed in CT  [Color Legend](#) Color By: Personnel 

11:00 AM - 12:00 PM	NRP 7th Edition Instructor-Led Event	<span>Options</span> 
11:30 AM - 1:30 PM	NRP 7th Edition Hands-On Training	<span>Options</span> 
3:00 PM - 4:30 PM	NRP 7th Edition Provider Class	<span>Options</span> 

### To display events in list format:

Click the list view button [  ] on the Event Calendar.

## USING EVENT CALENDAR FILTERS

By default, the Event Calendar displays all instructor-led events in the system. You can use filters to display only those events that meet certain criteria.

You can find the filters in the **Filter** section, directly below the Event Calendar.

### To apply a saved filter:

1. Select it from the **My Filters** list. See [Saving Filters](#) for more information about saved filters.
2. To clear the filter, select the **Select a Filter** option from the **My Filters** list.

### To filter by personnel:

1. Type at least three characters in the **Personnel** box to display a list of personnel whose name contains the characters that you typed.
2. Click personnel in the list to select them. Selected people are indicated by a check mark [  ]. If you need to deselect someone, click the check mark next to his or her name.
3. Click anywhere outside the list to close it.

4. You can repeat steps 1 through 3 as many times as necessary.
5. The names of selected personnel are displayed under the **Personnel** box. You can click a name to remove it.
6. Click the **Update Filters** button to apply the filter.

#### To filter by rooms:

1. Type at least one character in the **Rooms** box to display a list of rooms whose name contains the characters that you typed.
2. Click rooms in the list to select them. Selected rooms are indicated by a check mark [  ]. If you need to deselect one, click the check mark next to its name.
3. Click anywhere outside the list to close it.
4. You can repeat steps 1 through 3 as many times as necessary.
5. The names of selected rooms are displayed under the **Rooms** box. You can click a name to remove it.
6. Click the **Update Filters** button to apply the filter.

#### To filter by equipment:

1. Type at least one character in the **Equipment** box to display a list of equipment whose name contains the characters that you typed.
2. Click equipment names in the list to select them. Selected equipment is indicated by a check mark [  ]. If you need to deselect one, click the check mark next to its name.
3. Click anywhere outside the list to close it.
4. You can repeat steps 1 through 3 as many times as necessary.
5. The names of selected equipment are displayed under the **Equipment** box. You can click a name to remove it.
6. Click the **Update Filters** button to apply the filter.

## SAVING FILTERS

If you frequently use the same criteria to filter the Event Calendar, you can save those criteria and apply them quickly using the **My Filters** list. See [Using Event Calendar Filters](#) for more information about setting filter criteria.

**To create a saved filter:**

1. Set the Event Calendar filters as needed.
2. Click the **Save New Filter** link above the **My Filters** box to open the Save New Filter screen.
3. Type a name for the filter in the **Name** box.
4. Click the **Save** button.

**DELETING SAVED FILTERS****To delete a saved filter:**

1. From the **My Filters** list, select the filter that you want to delete.
2. Click the **Manage Filter** link above the **My Filters** list to open the Manage Filter screen.
3. Click the **Delete** button.
4. When you are prompted to confirm the deletion, click the **Delete** button.

**SEARCHING THE EVENT CALENDAR****To search the Event Calendar:**

1. Type all or part of an event name in the text box in the Event Calendar search box [



].

2. Click the search button [  ] to search for events whose name contains the text you typed in the text box.
  - You can narrow the search results by using the filters on the right-hand side of the page. See Using the Event Calendar Search Results Filters for more information.
  - From the search results, you can click an event's **Show additional information** link to display its location and instructor(s). Click the **Expand All** button to show additional information for all the search results.
  - You can sort the results by clicking the sorting button (next to the **Expand All** button) and selecting a sort option.

**USING THE EVENT CALENDAR SEARCH RESULTS FILTERS**

You can use as many filters as needed. As you add filters, they will be displayed in the upper left section of the page. Clicking the **X** next to a filter will remove it.

### To filter by a date range:

1. Specify a start date.

- 1.1. Click the calendar button [  ] to open the date picker tool. You can use the previous [  ] and next [  ] buttons to change the month.

- 1.2. Click a date to select it.

2. Specify an end date.

- 2.1. Click the calendar button [  ] to open a date picker tool. You can use the previous [  ] and next [  ] buttons to change the month.

- 2.2. Click a date to select it.

### To display events outside your organization:

Select the **Include events outside my organization** check box. Events are only designated as *cross-organization* if the person who scheduled the event selected the **Cross-Organization** check box on the event's Settings page.

### To filter by building or location:

1. Click the **Building/Location** chevron [  ] to display the **Building** box.
2. Type at least three characters in the box to display a list of buildings whose name contains the characters you typed.
3. Click building names in the list to select them. Selected buildings are indicated by a check mark [  ]. If you need to deselect one, click the check mark next to its name.
4. Click anywhere outside the list to close it.
5. You can repeat steps 1 through 4 as many times as necessary.

### To filter by address:

1. Click the **Address** chevron [  ] to display the address filter fields (Country, State, etc.).
2. Select/specify address criteria as needed.
3. Click the **Apply** button to apply the filter.

#### To filter by personnel:

1. Click the **Personnel** chevron [  ] to display the **Search for Personnel** box.
2. Type at least three characters in the box to display a list of instructors whose name contains the characters you typed.
3. Click instructor names in the list to select them. Selected instructors are indicated by a check mark [  ]. If you need to deselect one, click the check mark next to his or her name.
4. Click anywhere outside the list to close it.
5. You can repeat steps 1 through 4 as many times as necessary.

#### To filter by equipment:

1. Click the **Equipment** chevron [  ] to display the **Search for Equipment** box.
2. Type at least one character in the box to display a list of equipment whose name contains the characters that you typed.
3. Click equipment names in the list to select them. Selected equipment is indicated by a check mark [  ]. If you need to deselect one, click the check mark next to its name.
4. Click anywhere outside the list to close it.
5. You can repeat steps 1 through 4 as many times as necessary.

## The My Events Page

### THE MY EVENTS PAGE

The My Events page displays the events for which you are listed as an instructor.

### SEARCHING FOR YOUR EVENTS

#### To search for your events:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.

2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.

3. Type all or part of an event name in the My Events search box [  ].

4. Click the search button [  ] to search for events whose name contains the text you typed in the text box.

- You can narrow the search results by using the filters on the right-hand side of the page. See [Using the My Events Page Filters](#) for more information.
- From the search results, you can click an event's **Show additional information** link to display its location and instructor(s). Click the **Expand All** button to show additional information for all the search results.
- You can sort the results by clicking the sorting button (next to the **Expand All** button) and selecting a sort option.

## USING THE MY EVENTS PAGE FILTERS

You can use as many filters as needed. As you add filters, they will be displayed in the upper left section of the page. Clicking the X next to a filter will remove it.

### To filter by a date range:

1. Specify a start date.

- 1.1. Click the calendar button [  ] to open the date picker tool. You can use the previous [  ] and next [  ] buttons to change the month.

- 1.2. Click a date to select it.

2. Specify an end date.

- 2.1. Click the calendar button [  ] to open a date picker tool. You can use the previous [  ] and next [  ] buttons to change the month.

- 2.2. Click a date to select it.

**To filter by building or location:**

1. Click the **Building/Location** chevron [  ] to display the **Building** box.
2. Type at least three characters in the box to display a list of buildings whose name contains the characters you typed.
3. Click building names in the list to select them. Selected buildings are indicated by a check mark [  ]. If you need to deselect one, click the check mark next to its name.
4. Click anywhere outside the list to close it.
5. You can repeat steps 1 through 4 as many times as necessary.

**To filter by address:**

1. Click the **Address** chevron [  ] to display the address filter fields (Country, State, etc.).
2. Select/specify address criteria as needed.
3. Click the **Apply** button to apply the filter.

**To filter by equipment:**

1. Click the **Equipment** chevron [  ] to display the **Search for Equipment** box.
2. Type at least one character in the box to display a list of equipment whose name contains the characters that you typed.
3. Click equipment names in the list to select them. Selected equipment is indicated by a check mark [  ]. If you need to deselect one, click the check mark next to its name.
4. Click anywhere outside the list to close it.
5. You can repeat steps 1 through 4 as many times as necessary.

## Managing Instructor-Led Events

### SCHEDULING AN INSTRUCTOR-LED EVENT

Instructor-led events can NOT be used for classroom learning activities.

#### To schedule an instructor-led event:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Add Event** button to open the Add Event page.
  - For NRP instructor-led events, you cannot change the settings in the **Grading** section.
4. Type a name for the event in the **Name** box.
5. Set the event's start date in the **Start** box. See [Selecting an Event's Date and Time](#) for more information about using the date/time picker tool.
6. Set the event's end date in the **End** box. See [Selecting an Event's Date and Time](#) for more information about using the date/time picker tool.
7. If you want learners from all HealthStream customer organizations to be able to register for the event, select the **Cross-Organization** check box.
8. In the **Minimum Registrants** box, enter the minimum number of registrants for the event.
9. In the **Maximum Registrants** box, enter the maximum number of registrants for the event.
  - For NRP events, the AAP requires a 1:8 instructor-to-learner ratio. If you enter a number greater than 8 in the **Maximum Registrants** box, you must schedule an appropriate number of instructors.
10. Select an option from the **Registration Access** list:
  - **Open for Admin and Self-Registration**—select this option if you want learners to be able to register for the event, or be registered by administrators.
  - **Open for Admin Registration**—select this option if you want administrators to be able to register students, but do not want learners to be able to register themselves.
  - **Not open for Registration**—select this option if you do not want anyone to register or be registered for the event.
11. If you want to enable a waitlist for the event, select the **Allowed** check box under the **Waitlist** heading. See [Waitlists](#) for more information about waitlists.

12. In the **Registration Rules** section, specify when you want to close self-registration for event.

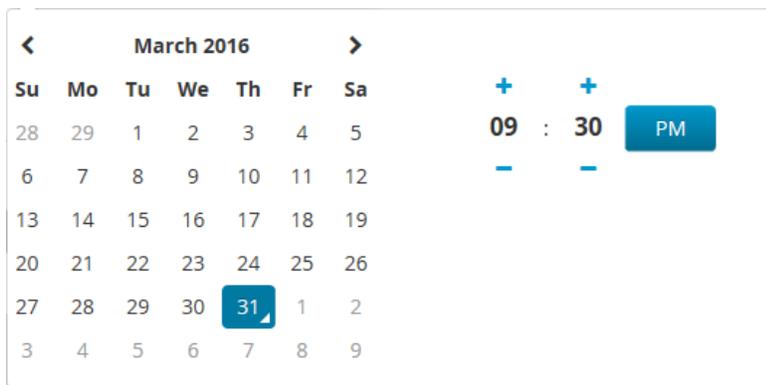
13. Click the **Save** button.

You can now schedule resources and personnel, if desired. Click the **Resources & Personnel** link to open the Resources & Personnel page. See [Managing an Event's Resources and Personnel](#) for more information.

## SELECTING AN EVENT'S DATE AND TIME

To select a date and time:

1. Click the calendar button [  ] to open the date/time picker tool.



2. Select a date.

2.1. If necessary, change the month by clicking the previous [  ] and next [  ] arrows.

2.2. Click a date to select it.

3. Select a time.

3.1. Select the hour by

- Clicking the plus [  ] button above the hour display, or the minus [  ] button below the hour display. OR
- Clicking the hour display to open a list of options, then clicking an option to select it.

3.2. Select the minute by

- Clicking the plus [  ] button above the minute display, or the minus [  ] button below the minute display. OR
- Clicking the minute display to open a list of options, then clicking an option to select it.

- 3.3. If the AM/PM display next to the time reads **AM**, you can click it to change it to **PM**. If it reads **PM**, you can click it to change it to **AM**.
4. Click anywhere outside the date/time picker tool to apply your selections.

## MANAGING AN EVENT'S RESOURCES AND PERSONNEL

Please read [Event Resource Management](#) for important information about instructor-led event resources.

### To manage an event's resources and personnel:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the event whose resources and personnel that you want to manage. See [Searching the Event Calendar](#) for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Event** option to open the event's Settings page.
7. Click the **Resources & Personnel** link to open the Resources & Personnel page.
8. You can add resources through the quick search feature, or by browsing the available resources. See [Selecting Resources with Quick Search and Browsing for Resources](#) for more information.
9. You can add personnel through the quick search feature, or by browsing the available personnel. See [Selecting Personnel with Quick Search and Browsing for Personnel](#) for more information.

When you select resources and personnel, they are added to a table on the Resources & Personnel page. Vertical lines indicate the event's start time and end time.

		Wed 04/20/2016											
NRP Instructor Mentor		9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM
Johnson, Patrick	 						✓ Available						

Red shading indicates a scheduling conflict. You can click a resource or person's name to open an information screen that displays the other event (or events) for which the resource or person is scheduled.

		Wed 04/20/2016											
NRP Instructor Mentor		9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM
Johnson, Patrick	 					✗ Unavailable	⚠	✓ Available					

To remove a resource or person from the event, click the remove button [  ] next to the resource or person's name.

Resources and personnel are scheduled for the same time period as the event. However, there may be times when you need to adjust schedules to extend beyond the event time. For example, you might want to ensure that the room and equipment are available fifteen minutes before and after the event to allow for equipment setup and breakdown. Click the edit button [  ] next to a resource or person's name to open an information screen.

✕
Patrick Johnson  
NH272

Contact Information

Adjust Resource Time

Start  hours and  minutes Before ▾ event Start ▾

End  hours and  minutes After ▾ event End ▾

The adjustments will apply to all occurrences

Update
Cancel

Then, in the **Adjust Schedule** section, use the text boxes and option lists to adjust the resource or person's schedule a number of hours and minutes before or after the event's start or end. Click the **Update** button to save the schedule adjustment.

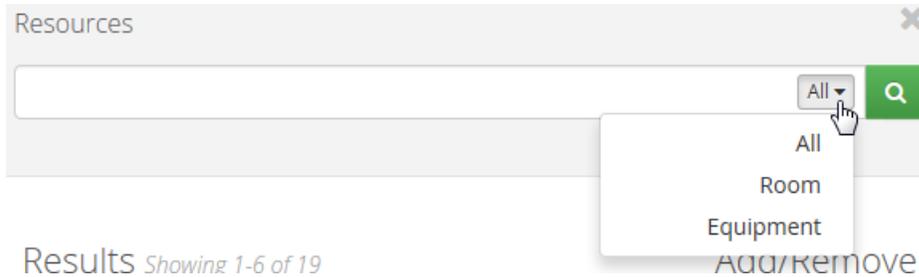
Click the **Save** button when you are finished managing the event's resources and personnel.

## BROWSING FOR RESOURCES

**To browse for and select event resources:**

- I. Click the **Browse All Resources** link in the **Select Resources** selection to open the Resources screen, which displays all available resources.

- If there are more available resources than can fit on the screen, you can use the previous [  ] and next [  ] buttons to page through the list.
2. You can narrow the resource list, if needed.
    - 2.1. If you want to restrict the list to a specific resource type, click the **All** button in the **Select Resources** section to open an option list, and click a resource type to select it.



- 2.2. If you know the name of the resource you need, you can type all or part of its name in the text box.
  - 2.3. Click the search button [  ]. The Resources screen will display only those resources of the type that you selected (if you selected a type) whose name contains that text that you entered in the text box (if you entered something).
3. To add a resource, click its select button [  ].
  4. To deselect a resource, click its remove button [  ].
  5. When you have finished selecting resources, click the Resource screen's **Close** button.

## SELECTING RESOURCES WITH QUICK SEARCH

### To select event resources with Quick Search:

1. If you want to restrict your search to a specific resource type, click the **All** button in the **Select Resources** section to open an option list, and click a resource type to select it.

### Select Resources

Quick Search All

[Browse All Resources](#)

All  
Room  
Equipment

2. Type at least three characters in the **Quick Search** box to display a list of resources whose name contains the text that you typed.

### Select Resources

cr- All

CR-001  
BUILDING: Avery Hall

CR-002  
BUILDING: Avery Hall

CR-003  
BUILDING: Avery Hall

3. Click resources in the list to select them. Selected resources are indicated by a check mark [  ]. If you need to deselect a resource, click its check mark.
  - If you select a room that has equipment associated with it, the equipment will also be selected.
4. Click anywhere outside the list to close it.

## BROWSING FOR PERSONNEL

For NRP events, the AAP requires a 1:8 instructor-to-student ratio. If more than eight students are registered for the event, you must schedule an appropriate number of instructors.

**To browse for personnel to add to an event:**

1. In the **Select Personnel** section of the Resources & Personnel page, click the **Browse All Personnel** link to open the Personnel screen, which displays all available personnel.
  - If there are more available people than can fit on the screen, you can use the previous [  ] and next [  ] buttons to page through the list.
2. You can narrow the list by typing all or part of a name in the text box and clicking the search button [  ]. The Personnel screen will only display people whose name includes the text you typed.
3. To add someone, click his or her select button [  ].
4. To deselect someone, click his or her remove button [  ].
5. When you have finished selecting personnel, click the Personnel screen's **Close** button.

## SELECTING PERSONNEL WITH QUICK SEARCH

For NRP events, the AAP requires a 1:8 instructor-to-student ratio. If more than eight students are registered for the event, you must schedule an appropriate number of instructors.

### To select event personnel with Quick Search:

1. In the **Select Personnel** section of the Resources & Personnel page, type at least three characters in the **Quick Search** box to display a list of personnel whose name contains the text you just typed.
2. Click personnel in the list to select them. Selected people are indicated by a check mark [  ]. If you need to deselect someone, click the check mark next to his or her name.
3. Click anywhere outside the list to close it.

## EDITING AN INSTRUCTOR-LED EVENT

### To edit an instructor-led event:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  Site Map ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.

4. Search for the event that you want to edit. See [Searching the Event Calendar](#) for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Event** option to open the event's Settings page.
7. Make any necessary edits.
8. Click the **Save** button.

## DELETING AN INSTRUCTOR-LED EVENT

Deleting an event drops all registered students. You cannot delete an event that has been graded.

### To delete an instructor-led event:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the event that you want to delete. See [Searching the Event Calendar](#) for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Event** option to open the event's Settings page.
7. Click the **Delete** button.
8. When you are prompted to confirm the deletion, click the **Yes, Delete** button.

## SENDING MESSAGES TO EVENT PARTICIPANTS

You can send messages to event participants, provided that they have a valid email address in the system.

### To send a message to event participants:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.

4. Search for the event whose participants you want to contact. See [Searching the Event Calendar](#) for more information.
5. From the search results, click the event's **Options** button to display the options list.
6. Select the **Send Message** option to open the Send a Message screen.
7. From the **Recipient** list, select the audience who will receive the message.
8. Type a subject for the message in the **Subject** box.
9. Type a message in the **Message** box.
10. Click the **Send Message** button.

## ADDING STUDENTS TO THE EVENT ROSTER (FULL SEARCH)

To select students for the event roster using the Full Search feature:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the event to whose roster you want to add students. See [Searching the Event Calendar](#) for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Event** option to open the event's Settings page.
7. Click the Roster link to open the event's Roster page.
8. Click the **Student Search** link to open the Search Student page.
9. Enter search criteria.
  - You can enter more than one user ID in the **User IDs** box. Separate them with commas.
10. Click the **Search** button.
11. From the search results, select the check box next to the name of the students you want to add to the roster.

- If the search returns more names than will fit on a page, you can click the previous page [  ], next page [  ], and page number buttons to move through the results.
- If a student's name is not selectable, he or she is not eligible to attend the event. This could be because the student has already registered for another event, or is not enrolled in the appropriate course.

12. Click the **Continue** button to add the selected students to the roster and return to the event Roster page.

## ADDING STUDENTS TO THE EVENT ROSTER (QUICK SEARCH)

To add students to the event roster with the **Quick Search** feature:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. From the search results, click an event's **Options** button to display the available options.
5. Select the **Manage Event** option to open the event's Settings page.
6. Click the **Roster** link to open the event's Roster page.
7. Type at least three characters in the **Quick Search** box to display a list of people whose name contains the text you just typed.
8. Click names in the list to select them. Selected people are indicated by a check mark [  ]. If you need to deselect someone, click the check mark next to his or her name.
9. Click anywhere outside the list to close it.

## REMOVING STUDENTS FROM THE EVENT ROSTER

You cannot remove a student who has been graded.

To remove a student from the event roster:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.

3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the event from whose roster you want to remove students. See Searching the Event Calendar for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Event** option to open the event's Settings page.
7. Click the **Roster** link to open the event's Roster page.
8. In the **Students** section, locate the student you want to remove.
9. Click the button in the **Actions** column [  ] to open an options list.
10. Select the **Remove** option.

## APPROVING AND DENYING INSTRUCTOR CANDIDATES

If you have the rank of Instructor Mentor, you must approve or deny instructor candidates who register for your event.

To approve or deny an instructor candidate:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the event to whose roster you need to manage. See Searching the Event Calendar for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Event** option to open the event's Settings page.
7. Click the **Roster** link to open the event's Roster page.
8. In the **Instructor Candidates** section of the event's Roster page, locate the candidate you need to approve or deny (*Approval Required* will appear in their **Status** column).
9. Click the button in the **Actions** column [  ] to open an options list.
10. Select the **Approve** or **Deny** option.

## GRADING EVENTS

Events can only be graded by the instructor(s) who led them. You should not change grades after you have saved or submitted them. Doing so can affect the student's completion in the course or curriculum, as well as their active status. If you change a saved or submitted grade, you must contact both the AAP and the student whose grade you changed.

When you finalize and submit a roster, you will receive credit for teaching the event. Resubmitting grades will not affect that credit.

### To grade an event:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.

2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.

3. Type all or part of an event name in the **My Events** search box [  ].

4. Click the search button [  ] to search for events whose name contains the text you typed in the text box.
  - You can narrow the search results by using the filters on the right-hand side of the page. See [Using the My Events Page Filters](#) for more information.
  - From the search results, you can click an event's **Show additional information** link to display its location and instructor(s). Click the **Expand All** button to show additional information for all the search results.
  - You can sort the results by clicking the sorting button (next to the **Expand All** button) and selecting a sort option.

5. From the search results, click an event's **Options** button to display the available options.

6. Select the **Manage Event** option to open the event's Settings page.

7. Click the **Grading** link to open the Grading page.

8. Grade students by clicking the **Pass**, **Fail**, or **No Show** button.

- You can click the **Save** button to save your progress as long as you have not graded all of the students yet.

9. When you have graded all of the students, click the **Finalize and Submit to AAP** button.

10. When you are prompted to confirm the submission, click the **Finalize and Submit to AAP** button.

## Managing Event Series

### EVENT SERIES

An event series is a group of instructor-led events. The events that make up the series are sometimes referred to as *occurrences*. You can schedule occurrences at regular intervals, such as every Thursday for ten weeks, or the third day of the month for six months.

If you want to schedule the same resources and personnel for each occurrence in the series, create the occurrences first, then schedule resources and personnel from the Resources & Personnel page.

### SCHEDULING AN EVENT SERIES

To schedule an event series:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Add Event** button to open the Add Event page.
  - For NRP instructor-led events, you cannot change the settings in the **Grading** section.
4. Type a name for the event in the **Name** box.
5. Set the event's start date in the **Start** box. See *Selecting an Event's Date and Time* for more information about using the date/time picker tool.
6. Set the event's end date in the **End** box. See *Selecting an Event's Date and Time* for more information about using the date/time picker tool.
7. If you want learners from all HealthStream customer organizations to be able to register for the event, select the **Cross-Organization** check box.
8. In the **Minimum Registrants** box, enter the minimum number of registrants for the event.
9. In the **Maximum Registrants** box, enter the maximum number of registrants for the event.
  - For NRP events, the AAP requires a 1:8 instructor-to-learner ratio. If you enter a number greater than 8 in the **Maximum Registrants** box, you must schedule an appropriate number of instructors.
10. Select an option from the **Registration Access** list:
  - **Open for Admin and Self-Registration**—select this option if you want learners to be able to register for the event, or be registered by administrators.

- **Open for Admin Registration**—select this option if you want administrators to be able to register students, but do not want learners to be able to register themselves.
- **Not open for Registration**—select this option if you do not want anyone to register or be registered for the event.

11. If you want to enable a waitlist for the event, select the **Allowed** check box under the **Waitlist** heading. See [Waitlists](#) for more information about waitlists.

12. In the **Registration Rules** section, specify when you want to close self-registration for event.

13. Click the **Save** button.

14. Click the **Add Series** link to open the Occurrences page.

15. Add occurrences to the series. See [Adding a Single Occurrence to a Series](#) and [Adding a Group of Recurring Events to an Event Series](#) for more information.

16. Schedule resources and personnel if needed.

16.1. Click the **Resources & Personnel** link to open the Resources & Personnel page.

16.2. You can add resources through the quick search feature, or by browsing the available resources. See [Selecting Resources with Quick Search](#) and [Browsing for Resources](#) for more information.

16.3. You can add personnel through the quick search feature, or by browsing the available personnel. See [Selecting Personnel with Quick Search](#) and [Browsing for Personnel](#) for more information.

When you select resources and personnel for an event series, they are added to a table on the Resources & Personnel page. There is a column for each event occurrence in the series. There is a row for each resource and instructor. Check boxes indicate whether a resource or an instructor is scheduled for an event.

	Thu Apr 21, 2016 09:00 AM - 10:00 AM	Thu Apr 28, 2016 09:00 AM - 10:00 AM	Thu May 05, 2016 09:00 AM - 10:00 AM
NRP Instructor Mentor			
Johnson, Patrick	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Pink shading indicates a scheduling conflict.

	Thu Apr 21, 2016 09:00 AM - 01:00 PM	Thu Apr 28, 2016 09:00 AM - 01:00 PM	Thu May 05, 2016 09:00 AM - 01:00 PM
NRP Instructor Mentor			
Johnson, Patrick	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To see which event is causing the conflict, click the appropriate column header to open the occurrence settings page, click the **Resources & Personnel** link to open the Resources & Personnel page, and then click the resource or instructor's name to open an information screen.

To remove a resource or an instructor from the entire series, click the remove button [  ] next to the resource or instructor's name. To remove a resource or an instructor from a specific event occurrence, clear the check box in the occurrence column.

Resources and personnel are scheduled for the same time period as the event. However, there may be times when you need to adjust schedules to extend beyond the event time. For example, you might want to ensure that the room and equipment are available fifteen minutes before and after the event to allow for equipment setup and breakdown. Click the edit button [  ] next to the resource or instructor's name to open an information screen.

Patrick Johnson  
NH272
✕

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Contact Information

Adjust Resource Time

Start  hours and  minutes Before ▾ event Start ▾

End  hours and  minutes After ▾ event End ▾

The adjustments will apply to all occurrences

Update
Cancel

Then, in the **Adjust Schedule** section, use the text boxes and option lists to adjust the resource or person's schedule a number of hours and minutes before or after the event's start or end. This will adjust the resource or instructor's schedule for ALL event occurrences with which the resource or instructor is associated. If you need to make adjustments to specific occurrences, appropriate column header to open the occurrence settings page, click

the **Resources & Personnel** link to open the Resources & Personnel page, and then click the edit button [  ] next to the resource or instructor's name to open an information screen. Then you can adjust the schedule as described above.

## SETTING RECURRENCE RULES

1. Select an option from the **Repeats** list.
2. Type a number in the **Every** box.
3. Specify further recurrence settings in the **On** section. The options in the section vary, depending on the option that you selected from the **Repeats** list.

- If you select **Weekly** from the **Repeats** list, ensure that the correct day of the week is selected in the **On** section. By default, the current day of the week is selected, which may not correspond to the event start date that you specified on the event's Settings page. Also, be aware that more than one weekday button can be selected (for example, both Tuesday and Thursday are selected in this image:



- ). If you do not want your event to recur on the current day of the week, be sure to click its button to deselect it.
4. In the **Start Date** box, specify the date for the first occurrence of the event.

- 4.1. Click the calendar button [  ] to open the date picker tool. You can use the previous [ ‹ ] and next [ › ] buttons to change the month.

- 4.2. Click a date to select it.

- The default start date is the current date, not the start date that you specified on the event's Settings page, so check it carefully.

5. Use the options in the **End** section to specify when the series occurrences should end.
6. In the **Start Time** and **End Time** boxes, specify the time when each occurrence should begin and end.

## MANAGING RESOURCES AND PERSONNEL FOR AN EVENT SERIES

Please read [Event Resource Management](#) for important information about instructor-led event resources.

### To manage resources and personnel for an event series:

When you create a series, the system can schedule the same resources and personnel for each occurrence, provided that you create the occurrences *before* you select resources and personnel. If you schedule resources and personnel first, your selections will only be applied to the first occurrence of the series.

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.

3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for an event that belongs to the series whose resources and personnel you want to manage. See [Searching the Event Calendar](#) for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Series** option to open the Occurrences page.
7. Click the **Resources & Personnel** link to open the Resources & Personnel page.
8. You can add resources through the quick search feature, or by browsing the available resources. See [Selecting Resources with Quick Search and Browsing for Resources](#) for more information.
9. You can add personnel through the quick search feature, or by browsing the available personnel. See [Selecting Personnel with Quick Search and Browsing for Personnel](#) for more information.

When you select resources and personnel for an event series, they are added to a table on the Resources & Personnel page. There is a column for each event occurrence in the series. There is a row for each resource and instructor. Check boxes indicate whether a resource or an instructor is scheduled for an event.

	Thu Apr 21, 2016 09:00 AM - 10:00 AM	Thu Apr 28, 2016 09:00 AM - 10:00 AM	Thu May 05, 2016 09:00 AM - 10:00 AM
NRP Instructor Mentor			
Johnson, Patrick  	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Pink shading indicates a scheduling conflict.

	Thu Apr 21, 2016 09:00 AM - 01:00 PM	Thu Apr 28, 2016 09:00 AM - 01:00 PM	Thu May 05, 2016 09:00 AM - 01:00 PM
NRP Instructor Mentor			
Johnson, Patrick  	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To see which event is causing the conflict, click the appropriate column header to open the occurrence settings page, click the **Resources & Personnel** link to open the Resources & Personnel page, and then click the resource or instructor's name to open an information screen.

To remove a resource or instructor from the entire series, click the remove button  next to the resource or instructor's name. To remove a resource or instructor from a specific event occurrence, clear the resource or instructor's check box in the occurrence column.

Resources and personnel are scheduled for the same time period as the event. However, there may be times when you need to adjust schedules to extend beyond the event time. For example, you might want to ensure that the room and equipment are available fifteen minutes before and after the event to allow for equipment setup and breakdown. Click the edit button  next to a resource or instructor's name to open an information screen.

Patrick Johnson  
NH272
✕

Contact Information

Adjust Resource Time

Start  hours and  minutes Before ▾ event Start ▾

End  hours and  minutes After ▾ event End ▾

The adjustments will apply to all occurrences

Update
Cancel

Then, in the **Adjust Schedule** section, use the text boxes and option lists to adjust the schedule a number of hours and minutes before or after the event's start or end. This will adjust the resource or instructor's schedule for ALL event occurrences with which the resource or instructor is associated. If you need to make adjustments to specific occurrences, click the appropriate column header to open the occurrence settings page, click the **Resources &**

**Personnel** link to open the Resources & Personnel page, and then click the edit button [  ] next to a resource or instructor's name to open an information screen. Then you can adjust the schedule as described above.

## EDITING EVENTS IN A SERIES

To edit an event in a series:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the series that you want to manage. See [Searching the Event Calendar](#) for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Series** option to open the Occurrences page.

7. From the occurrences list, click an event's **Manage** button to open the event's Settings page.
8. Make any necessary edits.
9. Click the **Save** button.

## ADDING A GROUP OF RECURRING EVENTS TO AN EXISTING EVENT SERIES

### To add a group of recurring events to an event series:

Adding a group of recurring of recurring events to a series that already has multiple occurrences defined will delete the existing occurrences and replace them with new ones that fit the recurrence pattern that you specify. If you want to extend a series, you should use the **Add Occurrence** button to add single occurrences.

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for any event that belongs to the series that you want to manage. See [Searching the Event Calendar](#) for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Series** option to open the Occurrences page.
  - If the event is not already part of a series, select the **Manage Event** option to open the Settings page and then click the **Add Series** link to open the Occurrences page.
7. From a series' Occurrences page, click the **Recurrence Pattern** button to open the Recurrence Rules screen.
8. Select an option from the **Repeats** list.
9. Type a number in the **Every** box.
10. Specify further recurrence settings in the **On** section. The options in the section vary, depending on the option that you selected from the **Repeats** list.
  - If you select **Weekly** from the **Repeats** list, ensure that the correct day of the week is selected in the **On** section. By default, the current day of the week is selected, which may not correspond to the event start date that you specified on the event's Settings page. Also, be aware that more than one weekday button can be selected (for example, both Tuesday and Thursday are selected in this image:



). If you do not want your event to recur on the current day of the week, be sure to click its button to deselect it.

11. In the **Start Date** box, specify the date for the first occurrence of the event.

11.1. Click the calendar button [  ] to open the date picker tool. You can use the previous [ « ] and next [ » ] buttons to change the month.

11.2. Click a date to select it.

- The default start date is the current date, not the start date that you specified on the event's Settings page, so check it carefully.

12. Use the options in the **End** section to specify when the series occurrences should end.

13. In the **Start Time** and **End Time** boxes, specify the time when each occurrence should begin and end.

14. Click the **Update** button to add the recurring events to the series.

15. Click the **Save** button.

You can edit an individual occurrence by clicking its **Manage** button to open the occurrence's Settings page.

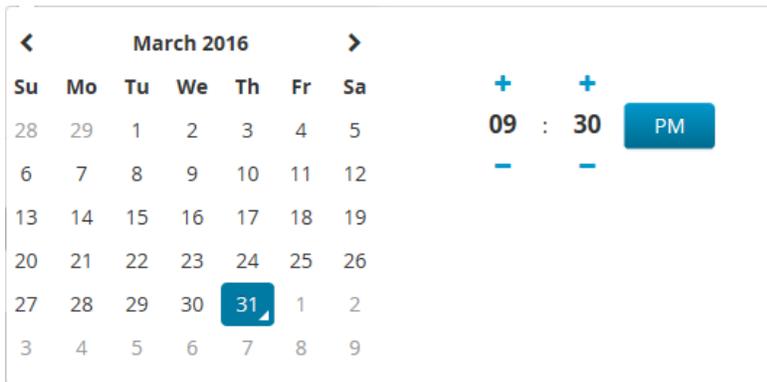
## ADDING A SINGLE OCCURRENCE TO AN EXISTING EVENT SERIES

To add a single occurrence to an existing event series:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for any event that belongs to the series that you want to manage. See [Searching the Event Calendar](#) for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Series** option to open the Occurrences page.

- If the event is not already part of a series, select the **Manage Event** option to open the Settings page and then click the **Add Series** link to open the Occurrences page.
7. From the series' Occurrences page, click the **Add Occurrence** button to add an event to the bottom of the occurrences list.
  8. Adjust the start and end dates/time as needed.

9. Click the calendar button [  ] to open the date/time picker tool.



10. Select a date.

10.1. If necessary, change the month by clicking the previous [  ] and next [  ] arrows.

10.2. Click a date to select it.

11. Select a time.

11.1. Select the hour by

- Clicking the plus [  ] button above the hour display, or the minus [  ] button below the hour display. OR
- Clicking the hour display to open a list of options, then clicking an option to select it.

11.2. Select the minute by

- Clicking the plus [  ] button above the minute display, or the minus [  ] button below the minute display. OR
- Clicking the minute display to open a list of options, then clicking an option to select it.

11.3. If the AM/PM display next to the time reads **AM**, you can click it to change it to **PM**. If it reads **PM**, you can click it to change it to **AM**.

12. Click anywhere outside the date/time picker tool to apply your selections.

13. Click the **Save** button.

You can make further edits to the new occurrence by clicking its **Manage** button to open the occurrence's Settings page.

## CHANGING THE NAME OF AN EVENT SERIES

Changing the name of an event series changes the name of all the occurrences in the series.

**To change the name of an event series:**

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for any event that belongs to the series whose name you want to change. See [Searching the Event Calendar](#) for more information.
5. From the search results, click the event's **Options** button to display the available options.
6. Select the **Manage Series** option to open the series' Occurrences page.
7. Click the **Series Settings** link to open the Series Settings page.
8. Change the name in the **Name** box.
9. Click the **Save** button.

## EDITING EVENTS IN A SERIES

To edit an event in a series:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.

4. Search for the series that you want to manage. See [Searching the Event Calendar](#) for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Series** option to open the Occurrences page.
7. From the occurrences list, click an event's **Manage** button to open the event's Settings page.
8. Make any necessary edits.
9. Click the **Save** button.

## DELETING EVENTS IN A SERIES

Deleting an event drops all registered students. You cannot delete an event that has been graded.

### To delete an event in a series:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for any event that belongs to the series that you want to manage. See [Searching the Event Calendar](#) for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Series** option to open the Occurrences page.
7. Click an occurrence's **Remove** button to remove it from the occurrences list.
8. Click the **Save** button.

## DELETING AN EVENT SERIES

Deleting a series will delete all ungraded events in the series. Graded events will not be deleted.

### To delete an event series:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.

4. Search for an event that belongs to the series that you want to delete. See [Searching the Event Calendar](#) for more information.
5. From the search results, click the event's **Options** button to display the available options.
6. Select the **Manage Series** option to open the series' Occurrences page.
7. Click the **Delete Series** button.
8. When you are prompted to delete the series, click the **Yes, Delete** button.

## Event Resource Management

### EVENT RESOURCE MANAGEMENT

When you schedule an event, you not only designate a date and time, but also a place (a building and room(s)), so students who register for the event know where to go. You can also specify the equipment that you will be using, so that other people who schedule events can see that the equipment will not be available to them while your event is taking place. Buildings, rooms, and equipment are referred to as event *resources*.

Before you can specify resources for events, however, they must be added to the system. When you are adding resources to system, keep the following points in mind:

- Before you can add a room, the building that contains it must already exist in the system.
- Before you add a resource, you should check to see whether it is already in the system.
- Equipment can be associated with a building and/or a room, but it is not required.

#### An Important Note about Event Resources

If your institution uses HLC classroom functionality, you should be aware that resources created for classes are completely separate from resources created for instructor-led events. For example, perhaps there is a simulation lab at your hospital where simulation classes take place, and that lab has been added to the HLC as a resource that can be scheduled. That simulation lab will not automatically appear in the list of resources available for instructor-led events. It must be added to the system a second time.

Furthermore, the system can only identify resource scheduling conflicts between two instructor-led events or two HLC classes, not between an instructor-led event and an HLC class. For example, if you schedule the simulation lab for an instructor-led event that occurs on February 26, 2017 from noon until 4:00 PM, and someone else schedules the same room for a class on the same day from 2:00 PM to 3:00 PM, the system will not detect that the room is double-booked. The same is true for instructors as well. For this reason, when you schedule resources and instructors, you should coordinate with an HLC administrator (if you are not one yourself) to ensure that there are no scheduling conflicts.

### ADDING BUILDINGS

Buildings represent physical, "brick-and-mortar" structures that contain rooms and equipment. Before you add a new building, you should check to see whether it already exists in the system.

#### To add a building:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Click the **Add Building** button to open the Add Building page.
  - All fields are required, unless marked Optional.
5. Leave *Active* selected in the **Status** list if you want it to be available for use.
6. Type a name for the building in the **Name** box.
7. Fill in the rest of the address information (**Address 1**, **City**, **State**, etc.).
8. Click the **Save** button to save the building.
  - If you want to start adding another building immediately, click the **Save and Add Another** button to open a new Add Building page, and repeat steps 5 through 8 above.
  - You can click the **Save and Copy** button to add the building and immediately make a copy of it, which you can then edit as needed. This can save time if you need to add another building that shares information (such as city, state, and zip code) with the one you just added.
  - If desired, you can start adding rooms and equipment immediately by clicking the **Add Room** or **Add Equipment** buttons (click the **Equipment** tab to display the Add Equipment button).

## EDITING BUILDINGS

### To edit a building:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Search for the building that you need to edit. Either
  - Type all or part of the building name in the **Resources** search box [



] and click the search button [  ] to search for buildings whose name contains the text that you type, or

- Click the **Buildings** tab and browse for the building.
5. Click the building's **View** button to open its details page.
  6. Click the **Edit Building** button to open the Edit Building page.
  7. Make any necessary edits.
  8. Click the **Save** button.

## MAKING A BUILDING INACTIVE

If you make a building inactive, any rooms or equipment that it contains will also be made inactive, and therefore unavailable for scheduling.

### To make a building inactive:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Search for the building that you need to edit. Either

- Type all or part of the building name in the **Resources** search box [



] and click the search button [  ] to search for buildings whose name contains the text that you type, or

- Click the **Buildings** tab and browse for the building.
5. Click the building's **View** button to open its details page.
  6. Click the **Edit** button to open the Edit Building page.
  7. Select the **Inactive** option from the **Status** list.
  8. Click the **Save** button.

## REACTIVATING AN INACTIVE BUILDING

To reactive an inactive building:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Type all or part of name of the building that you want to reactivate in the **Resources** search box [  ] and click the search button [  ] to search for buildings whose name contains the text that you type.
5. Select the **Inactive** check box in the **Resource Status** filter section on the left-hand side of the search results page to display inactive buildings.
  - You can clear the **Active** check box in the **Resource Status** filter section to hide active buildings.
6. Click the building's **View** button to open its details page.
7. Click the **Edit** button to open the Edit Building page.
8. Select the **Active** option from the **Status** list.
9. Click the **Save** button.

## ADDING EQUIPMENT

To add equipment:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Click the **Add Equipment** button to open the Add Equipment page.
  - All fields are required, unless marked Optional.

5. Leave *Active* selected in the **Status** list if you want it to be available for use.
6. Type a name for the equipment in the **Name** box.
7. Add other equipment information, if needed.
  - You can associate equipment with a building and/or a room, but it is not required.
8. Click the **Save** button to save the room.
  - If you want to start adding another piece of equipment immediately, click the **Save and Add Another** button to open a new Add Equipment page, and repeat steps 5 through 8 above.
  - You can click the **Save and Copy** button to add the equipment and immediately make a copy of it, which you can then edit as needed. This can save time if you need to add another piece of equipment that shares information (such as the building or room) with the one you just added.

## EDITING EQUIPMENT

### To edit equipment:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Search for the equipment that you need to edit. Either
  - Type all or part of the equipment name in the **Resources** search box [  ] and click the search button [  ] to search for equipment whose name contains the text that you type, or
    - Click the **Equipment** tab and browse for the equipment.
5. Click the equipment's **View** button to open its details page.
6. Click the **Edit Equipment** button to open the Edit Equipment page.
7. Make any necessary edits.
8. Click the **Save** button.

## MAKING EQUIPMENT INACTIVE

If you make equipment inactive, it will be unavailable for scheduling.

**To make equipment inactive:**

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Search for the equipment that you need to edit. Either
  - Type all or part of the equipment name in the **Resources** search box [  ] and click the search button [  ] to search for equipment whose name contains the text that you type, or
    - Click the **Equipment** tab and browse for the Equipment.
5. Click the equipment's **View** button to open its details page.
6. Click the **Edit Equipment** button to open the Edit Equipment page.
7. Select the **Inactive** option from the **Status** list.
8. Click the **Save** button.

## REACTIVATING INACTIVE EQUIPMENT

To reactive inactive equipment:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.

4. Type all or part of name of the equipment that you want to reactivate in the **Resources** search box [



] and click the search button [  ] to search for equipment whose name contains the text that you type.

5. Select the **Inactive** check box in the **Resource Status** filter section on the left-hand side of the search results page to display inactive equipment.
  - You can clear the **Active** check box in the **Resource Status** filter section to hide active equipment.
6. Click the equipment's **View** button to open its details page.
7. Click the **Edit Equipment** button to open the Edit Equipment page.
8. Select the **Active** option from the **Status** list.
9. Click the **Save** button.

## ADDING ROOMS

Before you add a room, the building that contains it must already exist in the system. See [Adding Buildings](#).

### To add a room:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Click the **Add Room** button to open the Add Room screen.
5. From the **Building** list, select the building that contains the room that you are adding.
6. Click the **Continue** button to open the Add Room page.
  - All fields are required, unless marked Optional.
7. Leave *Active* selected in the **Status** list if you want it to be available for use.
8. Type a name for the room in the **Name** box.
9. Add optional room information, if needed.

10. Click the **Save** button to save the room.

- If you want to start adding another room immediately, click the **Save and Add Another** button to open a new Add Room page, and repeat steps 7 through 10 above.
- You can click the **Save and Copy** button to add the room and immediately make a copy of it, which you can then edit as needed. This can save time if you need to add another room that shares information (such as the building) with the one you just added.
- If desired, you can start adding equipment immediately by clicking the **Add Equipment** button.

## EDITING ROOMS

**To edit a room:**

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Search for the room that you need to edit. Either
  - Type all or part of the room name in the **Resources** search box [  ] and click the search button [  ] to search for rooms whose name contains the text that you type, or
    - Click the **Rooms** tab and browse for the room.
5. Click the room's **View** button to open its details page.
6. Click the **Edit Room** button to open the Edit Room page.
7. Make any necessary edits.
8. Click the **Save** button.

## MAKING A ROOM INACTIVE

If you make a room inactive, any equipment that it contains will also be made inactive, and therefore unavailable for scheduling.

**To make a room inactive:**

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Search for the room that you need to edit. Either
  - Type all or part of the room name in the **Resources** search box [  ] and click the search button [  ] to search for rooms whose name contains the text that you type, or
    - Click the **Rooms** tab and browse for the Room.
5. Click the room's **View** button to open its details page.
6. Click the **Edit Room** button to open the Edit Room page.
7. Select the **Inactive** option from the **Status** list.
8. Click the **Save** button.

## REACTIVATING AN INACTIVE ROOM

To reactive an inactive room:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Resources** tab to open the Event Resources page.
4. Type all or part of name of the room that you want to reactivate in the **Resources** search box [  ] and click the search button [  ] to search for rooms whose name contains the text that you type.
5. Select the **Inactive** check box in the **Resource Status** filter section on the left-hand side of the search results page to display inactive rooms.

- You can clear the **Active** check box in the **Resource Status** filter section to hide active rooms.
6. Click the room's **View** button to open its details page.
  7. Click the **Edit Room** button to open the Edit Room page.
  8. Select the **Active** option from the **Status** list.
  9. Click the **Save** button.

## Waitlists

### WAITLISTS

When an event is at maximum capacity, students cannot register for it. However, if a waitlist is enabled for the event, students can add themselves (or be added) to the list, in case there are cancellations in the future that will allow them to be added to the roster and attend the event.

A waitlist can be enabled from an event's **Settings** tab. Selecting the **Allowed** check box under the **Waitlist** heading enables a waitlist.

Registration

There are currently 8 person(s) registered and 2 person(s) waitlisted.

Minimum Registrants	Maximum Registrants	Registration Access	Waitlist
<input type="text" value="1"/>	<input type="text" value="8"/>	<input type="text" value="Open for Admin and Self-I"/>	<input checked="" type="checkbox"/> Allowed

Registration Rules

Close Self-Registration  Hour(s)  before event starts.

Waitlisted students are listed on the event's roster, after the registered students. **Waitlist** appears in the **Status** column for waitlisted students, and a number indicates their place on the list.

Instructor Candidates

Quick Search

[Instructor Candidate Search](#)

There are no Instructor Candidates currently registered.

Students *Showing 1 - 3 of 3 entries*

1 Registered 0 Seats Available 2 Waitlisted

Registration is full. Additional students will be waitlisted.

Quick Search

[Student Search](#)

Name	User ID	Department	Institution	Added Date	Added By	Status	Actions
Aaron, Holly	NOR262	Cardiology	ACME General Medical Center	08/18/2016 2:25 AM	Admin1	Registered	<input type="button" value="v"/>
Andrews, Mark	NOR110	Nursing	ACME General Medical Center	08/25/2016 5:23 AM	Admin1	Waitlist 1	<input type="button" value="v"/>
Bennett, Talia	NOR143	Cardiology	ACME General Medical Center	08/25/2016 5:23 AM	Admin1	Waitlist 2	<input type="button" value="v"/>

Show 10

If an event is full, and a waitlist has been enabled, you can add students to the waitlist in the same way that you add them to an event roster.

## WAITLISTS

When an event is at maximum capacity, students cannot register for it. However, if a waitlist is enabled for the event, students can add themselves (or be added) to the list, in case there are cancellations in the future that will allow them to be added to the roster and attend the event.

A waitlist can be enabled from an event's **Settings** tab. Selecting the **Allowed** check box under the **Waitlist** heading enables a waitlist.

Registration

There are currently 8 person(s) registered and 2 person(s) waitlisted.

Minimum Registrants

Maximum Registrants

Registration Access

Waitlist  Allowed

Registration Rules

Close Self-Registration  Hour(s)  before event starts.

Waitlisted students are listed on the event's roster, after the registered students. **Waitlist** appears in the **Status** column for waitlisted students, and a number indicates their place on the list.

Instructor Candidates

Quick Search   [Instructor Candidate Search](#)

There are no Instructor Candidates currently registered.

Students *Showing 1 - 3 of 3 entries*

1 Registered 0 Seats Available 2 Waitlisted

Registration is full. Additional students will be waitlisted.

Quick Search   [Student Search](#)

Name	User ID	Department	Institution	Added Date	Added By	Status	Actions
Aaron, Holly	NOR262	Cardiology	ACME General Medical Center	08/18/2016 2:25 AM	Admin1	Registered	
Andrews, Mark	NOR110	Nursing	ACME General Medical Center	08/25/2016 5:23 AM	Admin1	Waitlist 1	
Bennett, Talia	NOR143	Cardiology	ACME General Medical Center	08/25/2016 5:23 AM	Admin1	Waitlist 2	

Show 10   1 

If an event is full, and a waitlist has been enabled, you can add students to the waitlist in the same way that you add them to an event roster.

## ENABLING WAITLISTS FOR EVENTS

### To enable a waitlist for an event:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the event for which you want to enable a waitlist.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Event** option to open the event's Settings page.
7. In the **Registration** section, select the **Allowed** check box under the **Waitlist** heading.
8. Click the **Save** button.

## ADDING STUDENTS TO A WAITLIST (FULL SEARCH)

You can only add students to a waitlist if waitlists are enabled for the event (see [Enabling Waitlists for Events](#)), and if the event is full. If you add several students at once, the system will add them to the waitlist in alphabetical order.

Instructor candidates cannot be added to a waitlist.

### To add students to a waitlist using the Full Search feature:

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the event to whose waitlist you want to add students. See Searching the Event Calendar for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Event** option to open the event's Settings page.
7. Click the **Roster** link to open the event's Roster page.
8. Click the **Student Search** link to open the Search Student page.
9. Enter search criteria.
  - You can enter more than one user ID in the **User IDs** box. Separate them with commas.
10. Click the **Search** button.
11. From the search results, select the check box next to the name of the students you want to add to the waitlist.
  - If the search returns more names than will fit on a page, you can click the previous page [  ], next page [  ], and page number buttons to move through the results.
  - If a student's name is not selectable, he or she is not eligible to attend the event. This could be because the student has already registered for another event, or is not enrolled in the appropriate course.
12. Click the **Continue** button to add the selected students to the waitlist and return to the event Roster page.

## ADDING STUDENTS TO A WAITLIST (QUICK SEARCH)

You can only add students to a waitlist if waitlists are enabled for the event (see [Enabling Waitlists for Events](#)), and if the event is full. If you add several students at once, the system will add them to the waitlist in alphabetical order.

Instructor candidates cannot be added to a waitlist.

**To add students to a waitlist with the Quick Search feature:**

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. From the search results, click an event's **Options** button to display the available options.
5. Select the **Manage Event** option to open the event's Settings page.
6. Click the **Roster** link to open the event's Roster page.
7. Type at least three characters in the **Quick Search** box to display a list of people whose name contains the text you just typed.
8. Click names in the list to select them. Selected people are indicated by a check mark [  ]. If you need to deselect someone, click the check mark next to his or her name.
9. Click anywhere outside the list to close it.

## **FORCE ADDING A STUDENT TO THE ROSTER FROM THE WAITLIST**

Moving a student from the waitlist to the event roster even though the event is still full is sometimes called *force adding* the student.

Force adding a student increases the maximum event capacity by one.

**To force add a student to the event roster:**

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the event from whose waitlist you want to add a student to the roster. See Searching the Event Calendar for more information.
5. From the search results, click an event's **Options** button to display the available options.

6. Select the **Manage Event** option to open the event's Settings page.
7. Click the **Roster** link to open the event's Roster page.
8. In the **Students** section, locate the student you want to force add.
9. Click the button in the **Actions** column [  ] to open an options list.
10. Select the **Force** option.

### *Moving a Student to the Top of a Waitlist*

#### **To move a student to the top of a waitlist:**

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.
3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the event whose waitlist contains the student you want to move to the top. See Searching the Event Calendar for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Event** option to open the event's Settings page.
7. Click the **Roster** link to open the event's Roster page.
8. In the **Students** section, locate the student you want to move to the top of the waitlist.
9. Click the button in the **Actions** column [  ] to open an options list.
10. Select the **Move to First on Waitlist** option.

## **REMOVING STUDENTS FROM A WAITLIST**

#### **To remove a student from a waitlist:**

1. If you are not already in the instructor-led events section of the system, click the **Site Map** button [  [Site Map](#) ] to open the Site Map.
2. Click the **NRP 7th Edition Instructor-Led Events** link to open the My Events page.

3. Click the **Scheduling** tab to open the Event Calendar.
4. Search for the event from whose waitlist you want to remove students. See Searching the Event Calendar for more information.
5. From the search results, click an event's **Options** button to display the available options.
6. Select the **Manage Event** option to open the event's Settings page.
7. Click the **Roster** link to open the event's Roster page.
8. In the **Students** section, locate the student you want to remove.
9. Click the button in the **Actions** column [  ] to open an options list.
10. Select the **Remove** option.