

### Course Creation and Enrollment Instructions (module is completed in HR Learning)

These instructions are intended for online(i.e. modules) courses that are being held in HR Direct Learning. **Said differently, the learner will view the module and complete the course evaluation in HR Learning.** The purpose is to maintain the CCEHS processes for awarding credit and one comprehensive credit transcript for the learner. **Please note, it is the identified Nurse Planners responsibility to maintain activity outcomes data (i.e., evaluation and post-test results).**

**Step 1.** Submit Course Application. The application will be reviewed/approved and assigned to you.

**Step 2.** Access your approved Course Application (My Account\_My Courses).

**Step 3.** Create the course by choosing the following:

-**View** from the Activity Application dashboard

-**Create** activity

-**Course, Convert**

-Choose **Edit**, at this point so your course is created, choose **Save** . You will be sent back to the course screen, choose **Edit** again to configure the course. **It will cause problems later if you don't do this now.**

### COURSE\_APPLICATION



**Step 3a.** Navigate to **Course Description** tab and complete the following sections (vertical tabs).

-**Title and Description:** Enter the title of the course

-**Date & Time**

**Start date:** The start date is the date that module is active (in HR Learning)

**End date:** The end date is the date the module expires (in HR Learning)

**Note: Do not check live**

-**Faculty & disclosure:** Skip

-**Course format & instructions:** complete as applicable, Include the refund policy for the course in the

- **Format:** Choose Self-Study/Enduring Material
- **Category:** Skip
- **Required hardware / software:** Skip
- **Course instructions:** Skip
- **Registration instructions:** Skip

-**Program:** Include the following statement: *The content for this course including the course evaluation and quiz are held on UPMC Learning. For additional information please contact [insert the course contact].*

-**Marketing:** Choose Nobody may rate this activity

-**Venue:** Skip

-**Exhibitors:** Skip

-**File Attachments:** Skip

**Step 3b.** Navigate to **Course Settings** tab and complete the following sections (vertical tabs).

-**Course Settings:** **Outline Display** and **Enrollment Type** choose **Course**. Skip **Duration**.

-**External Course ID:** The external ID is the **SKU number** that can be found by navigating to the **Pricing** tab.

Replace "Course\_" with "Nursing\_".

**IMPORTANT (PLEASE READ!!!!):**

**-DO NOT check "Show on Catalog" or "Show on Calendar".**

**-ALWAYS check "Show on Transcript".**

-**Course Credit:** Make the available credit types that will be offered **Active** by navigating to each tab and doing the following (**Attendance should ALWAYS be made active**):

- Check the **Active** checkbox
- Select the appropriate increments (.25) and the max credits available.
- **IMPORANT: DO NOT CHECK VARIALBLE CREDIT!**

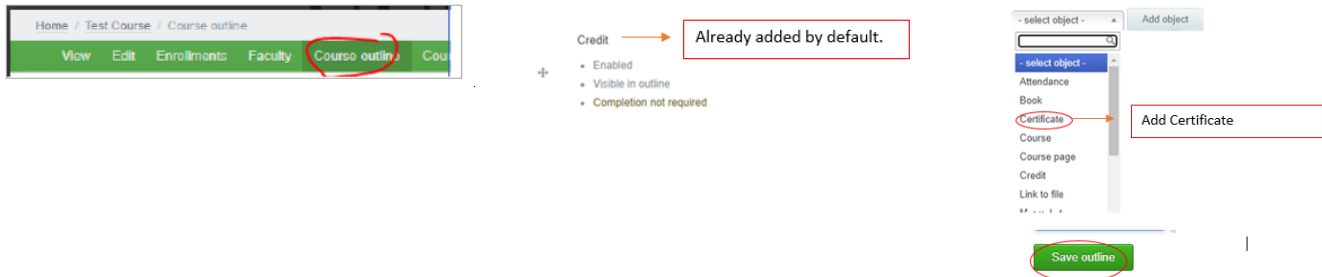
-**Certificate:** Choose Awarded Course Credit, under the type of credit that you are awarding, change the certificate to Enduring\_CME, ANCC, AAPA, Attendance

ANCC

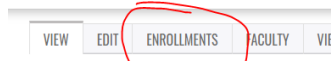
Enduring\_CME, ANCC, AAPA, Attendance

**Step 3c.** Publishing tab: Check to make sure the course is published. **SAVE.**

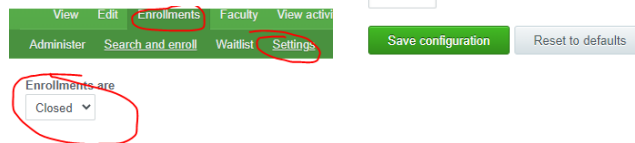
**Step 4.** Navigate to **Course Outline** either from the course landing page or on the green bar (if you are currently editing the course). Choose **Certificate** and select **Add Object**. Note, the Credit Object will automatically appear by default. **Save Outline.**



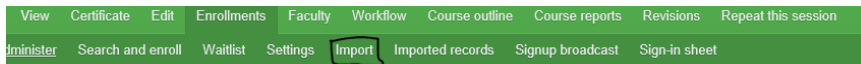
**Step 5.** Navigate to **Enrollments**.



**Step 5a.** Choose **Settings**, close enrollments.



**Step 5b.** Choose **Import**. You are awarding credit for an activity that the learner completed in HR Learning. For this reason, the only option is to award credit by **importing credit records**.



1. **Download** the template (or use a previously saved version).

- Columns `external_course_id`, `external_user_id`
- [Download a template](#)

2. **Enter** the highlighted fields as listed below.

external_course_id	Leave Blank	
external_user_id	Leave Blank	
*external_email	User Email Address	Required.
title		
first_name	First Name	Optional but recommended.
last_name	Last Name	Optional but recommended.
enrollment_start	Leave Blank	
enrollment_end	Leave Blank	
credits	Leave Blank	
credit_type	Leave Blank	
credit_expiration	Leave Blank	
** complete	1	Required.
Date_Completed	Enter Date the Learner completed the module.	Required.
attended	Leave Blank	
city	Leave Blank	
province	Leave Blank	
country	Leave Blank	
participant_category	Leave Blank	

**Delimiter**  
The character that delimits fields in the CSV file.

Note: Must be “,”  
Do not make changes to the default delimiter

\* Records are matched to users by **email address**

\*\* You must enter a “1” in the “complete” field or the learner will not receive credit.

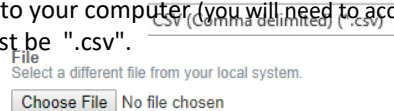
**Tip:** It is easier to look-up attendance records if you enter a first and last name.

Below is an example of a completed spreadsheet.

external_email	title	first_name	last_name	enrollment_start	enrollment_end	credits	credit_type	credit_expiration	complete	date_completed
Test@upmc.edu	Test	Tester							1	
Test1@uomc.edu	Test1	Tester1							1	

3. Once you have everyone entered in the document, save to your computer (you will need to access the saved spreadsheet in the next step). **Important Note:** Do not change the file type. It must be “.csv”.

4. Under “file” click **Choose File** and upload the document.



5. Check the box at the bottom “Assign records immediately” and “Import”.

