PowerHouse Workforce User Guide

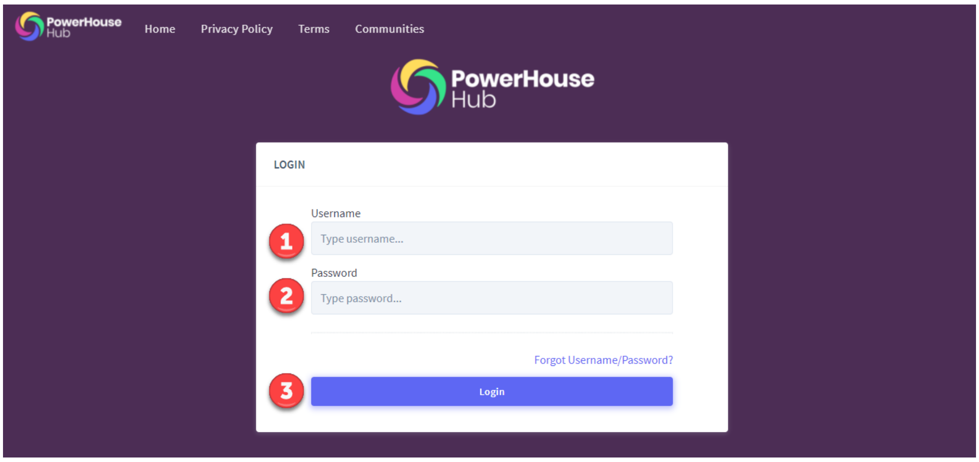
V.7.3

1. The Administration Portal

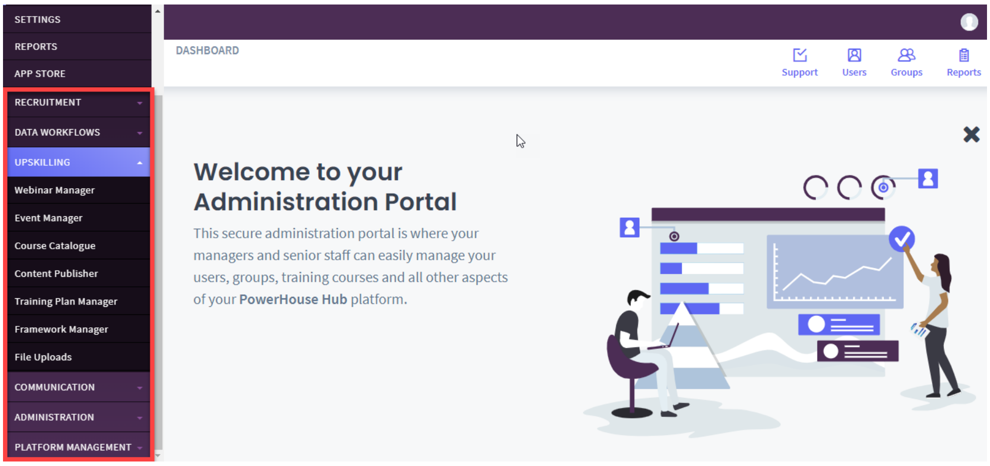
The secure Administration Portal is where you access your main log in for all editing and management on the platform from the back end. You would give Admin access to those that are either management or senior staff. The log in page is identical to that of the other users, yet once logged in under your credentials, all viewing, accessibility, and permissions are unique.

To log in, simply:

1. Enter your username
2. Enter your password
3. Click the Login button

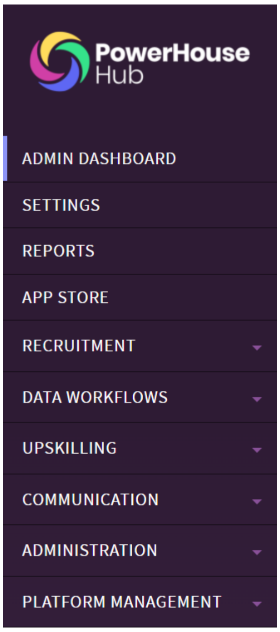


To access the modules within the platform, click the menu items within the left-hand side menu. As you click each section, it will expand to show all child modules.



2. Parent Modules

Parent modules can be found in the left-hand menu:



2.1 Dashboard

This is the default screen that you see once logged into the portal. The dashboard is where your managers and senior staff can easily manage your users, groups, training courses and all other aspects of your PowerHouse Hub platform.

2.2 Settings

This parent module is related to the pages of the learner portal. In this module you can adjust the Google Analytics settings, the email addresses that are used on the site, and enable or disable the available modules for certain user licenses. Settings such as CPD and re-induction for courses can also be adjusted here.

2.3 Reports

Reports play an important role in the management of this platform. Each feature has an auto generated report already available. If you want a customized report, you can easily generate this by clicki8ng the Create custom report button.

2.4 App Store

A selection of Apps has been integrated into the PowerHouse Workforce Platform to provide you with additional functionality and services. Select an App and follow the configuration settings to add the solution to your platform.

2.5 Recruitment

This parent module is where HR and hiring managers can easily create and manage current Jobs and talent pools. Recruitment is an optional module and will only display if enabled.

2.6 Data Workflow

This parent module allows you to create workflows and welcome emails for your new hires. These welcome emails will include a comprehensive Onboarding or Pre-screening Workflows with Content

Pages, a Personal Information section, a File Upload section and Verification Tasks. You can also add Care Advantage assessments and Police and Work Rights check in you have the App enabled.

2.7 Upskilling

This parent module has many features that will help build the foundation of your platform. Most importantly: Skills, File Uploads, Framework Manager to help create the backbone for all users to increase their professional development. You can also build your courses/training programs through the Content Publisher and create upcoming Events and Webinars.

2.8 Communication

This parent module allows you to publish News to your Users, create surveys for interaction and insight and upload all relative resources that your Users may need to complete any required training or tasks.

2.9 Administration

This parent module is your direct source for creating User Accounts, building Group Management for reporting purposes and content distribution across the platform; Group Branding to showcase your organisations colour schemes and imagery. This module also allows you to edit automated email templates and create relevant certificates for completions across all training.

2.10 Platform Management

This Parent Module provides access to Web Content Editor which is the source where you can edit all front-end content on your ecommerce/website page (Login Page). You not only can use this to showcase your general Privacy and Terms and Conditions yet also upcoming events in your organisation or community supports etc. Web Content Editor can be used to tailor your own banners, imagery, and external public announcements if desired. Web Content Editor will also allow you to configure your Talent Communities page if you have the Recruit Parent Module enabled.

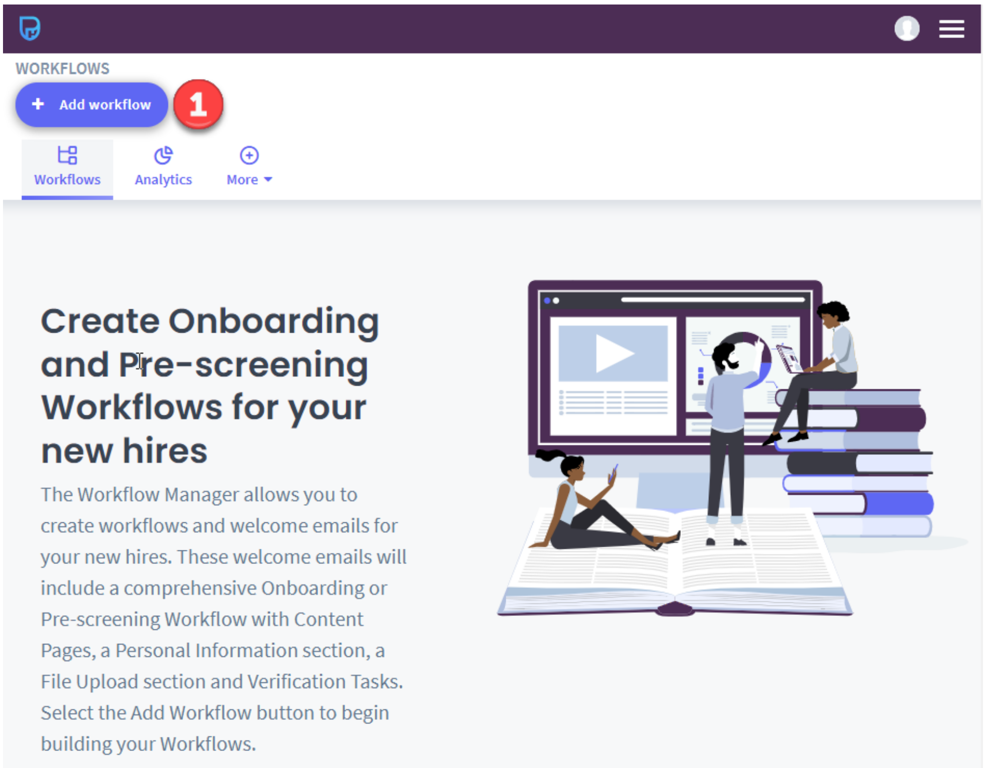
3. Data Workflows

3.1 Workflow Manager

Create Onboarding and Pre-screening Workflows for your new hires

The Workflow Manager allows you to create workflows and welcome emails for your new hires. These welcome emails will include a comprehensive Onboarding or Pre-screening Workflow with Content Pages, a Personal Information section, a File Upload section and Verification Tasks.

1. Click the Add Workflow button to begin building your Workflows.



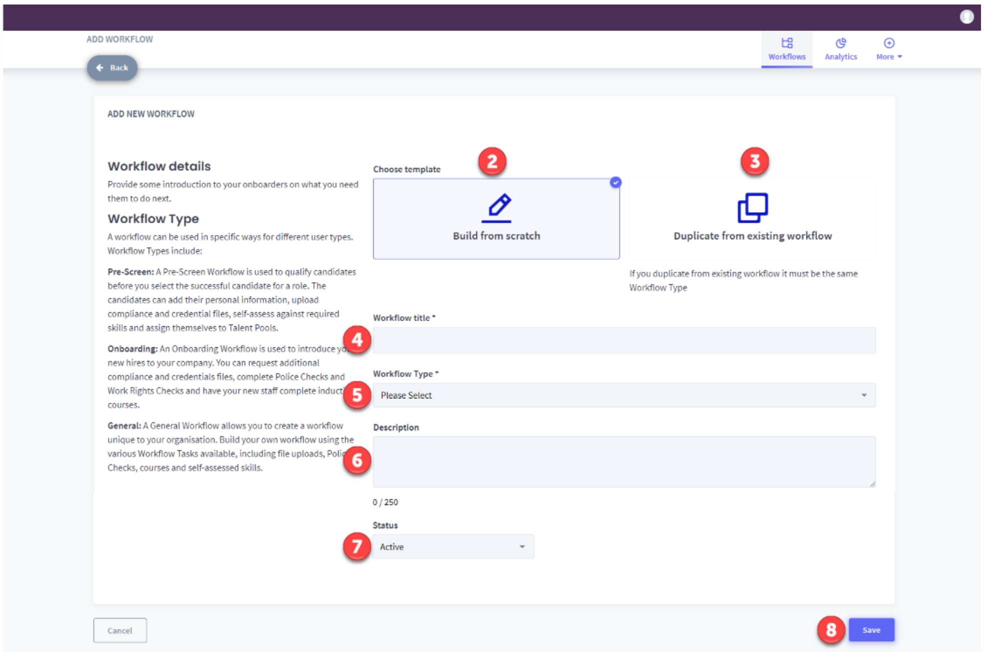
2. Click Build from scratch, if you want to build a workflow from scratch and then skip to step 4
3. Click duplicate from existing workflow if you have an existing workflow that you want to copy. You can then select the workflow you want to copy from the drop-down box that appears and click save.
4. If you selected Build from scratch in step 2, add a workflow title
5. Select the workflow type from the dropdown box option are:

   Pre-Screen: A Pre-Screen Workflow is used to qualify candidates before you select the successful candidate for a role. The candidates can add their personal information, upload compliance and credential files, self-assess against required skills and assign themselves to Talent Pools.

   Onboarding: An Onboarding Workflow is used to introduce your new hires to your company. You can request additional compliance and credentials files, complete Police Checks and Work Rights Checks and have your new staff complete induction courses.

General: A General Workflow allows you to create a workflow unique to your organisation. Build your own workflow using the various Workflow Tasks available, including file uploads, Police Checks, courses and self-assessed skills

6. Add a description to give more context to the Workflow.
7. Set the status of the workflow. Active means users can access the workflow. Disabled means users will not be able to view the workflow on the platform.
8. Click Save to save changes

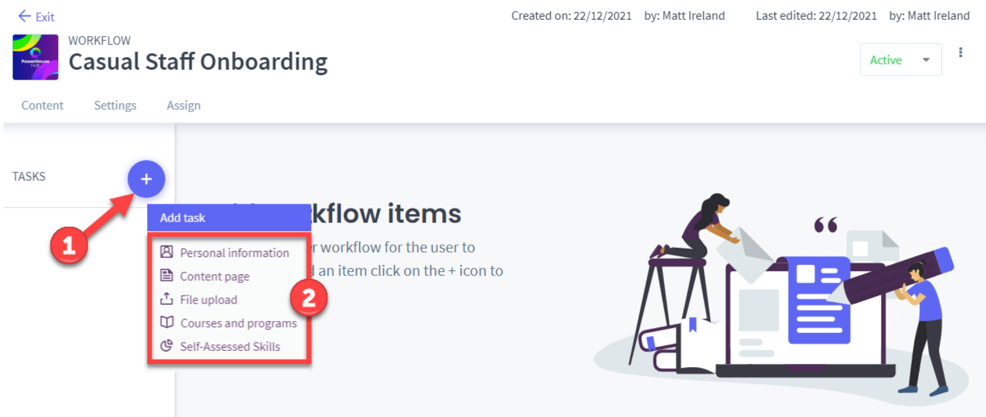


3.2 Adding workflow items

This is where you can add items to your workflow for the user to complete.

1 To add an item click on the + button

2 Select the required task

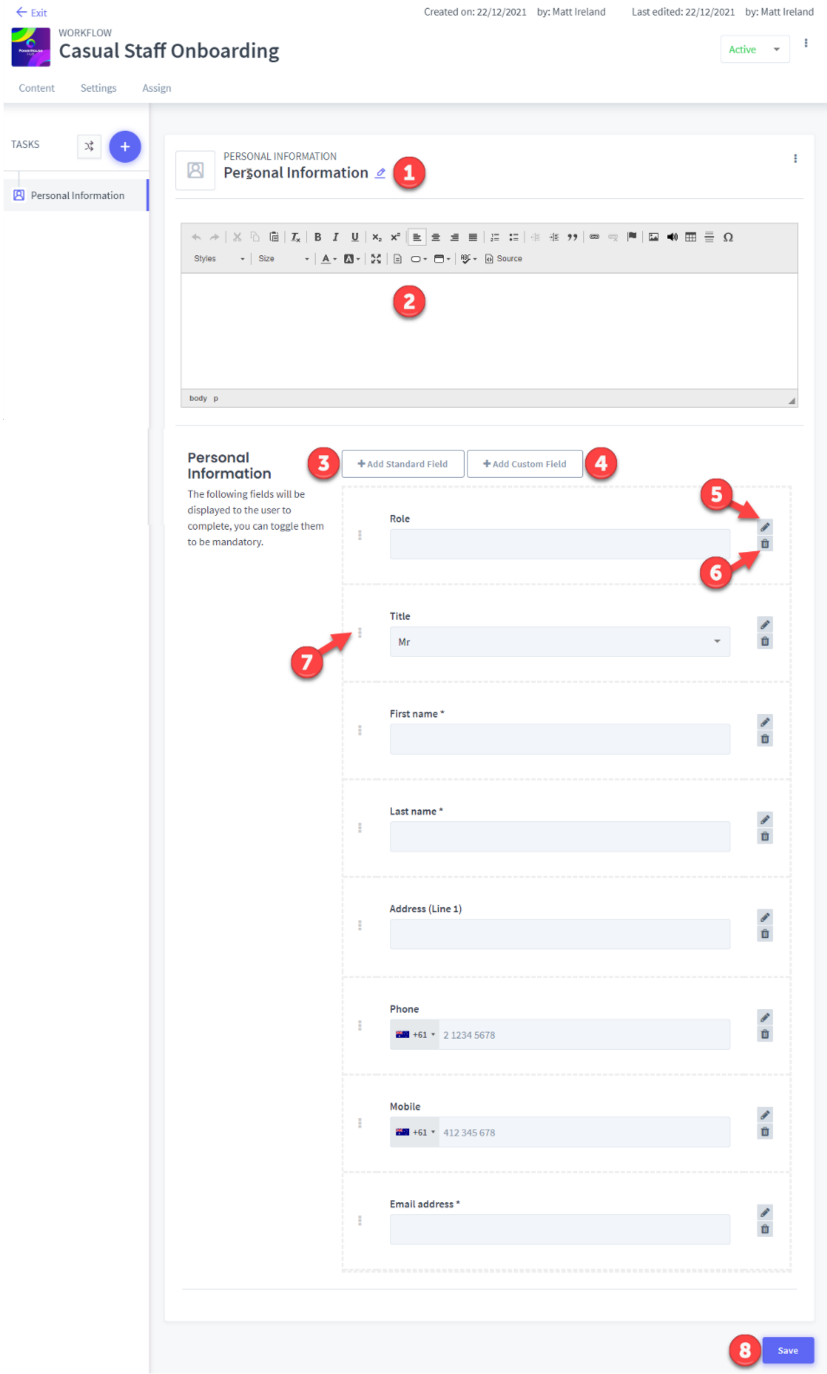


3.2.1 Personal Information

The preset name of this form is personal information, however, you can create any type of form for your business needs by renaming and deleting fields.

Before populating this task, ensure you have created Custom Fields for your personal information form.

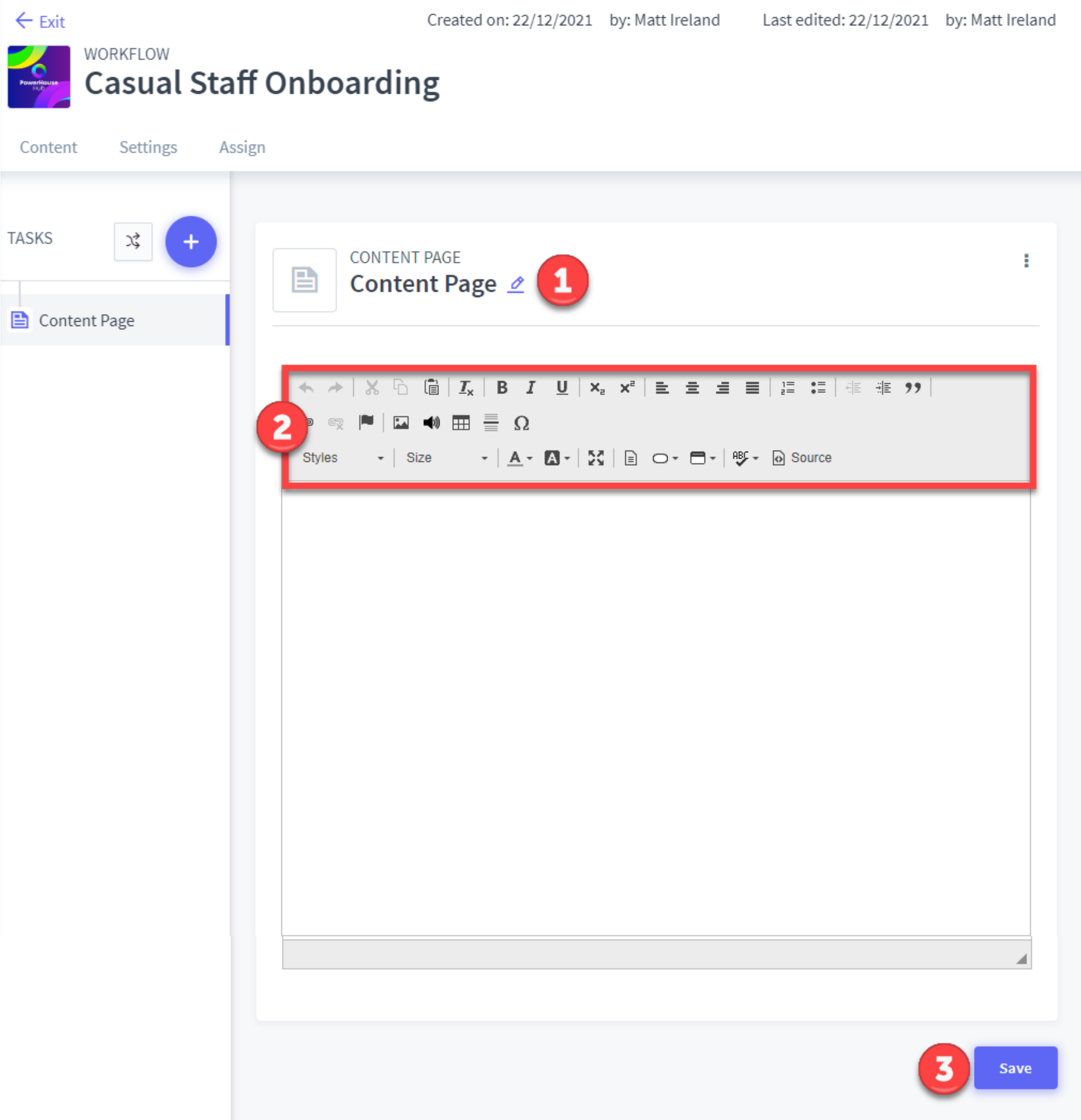
1 To change the title, click the edit icon, type in the desired title and click save button
2 In the CK editor add a brief description regarding the users next steps
3 Click Add Standard Field if you need to add another default field to your form
4 Click Add Custom Field if you need to add a custom field to your form
5 Click Rename to change name of field. Add a new title in the custom title field and press rename field button.
6 Click Remove field to delete field from the form
7 Click and drag the hamburger option to reorder fields
8 When all required fields are showing click Save



3.2.2 Content Page

The content page is used to provide general information relevant to your business.

1 To change the title, click the edit icon, type in the desired title and click save button
2 Use the options in the CK Editor to make your content more appealing
3 Once finished click the Save button



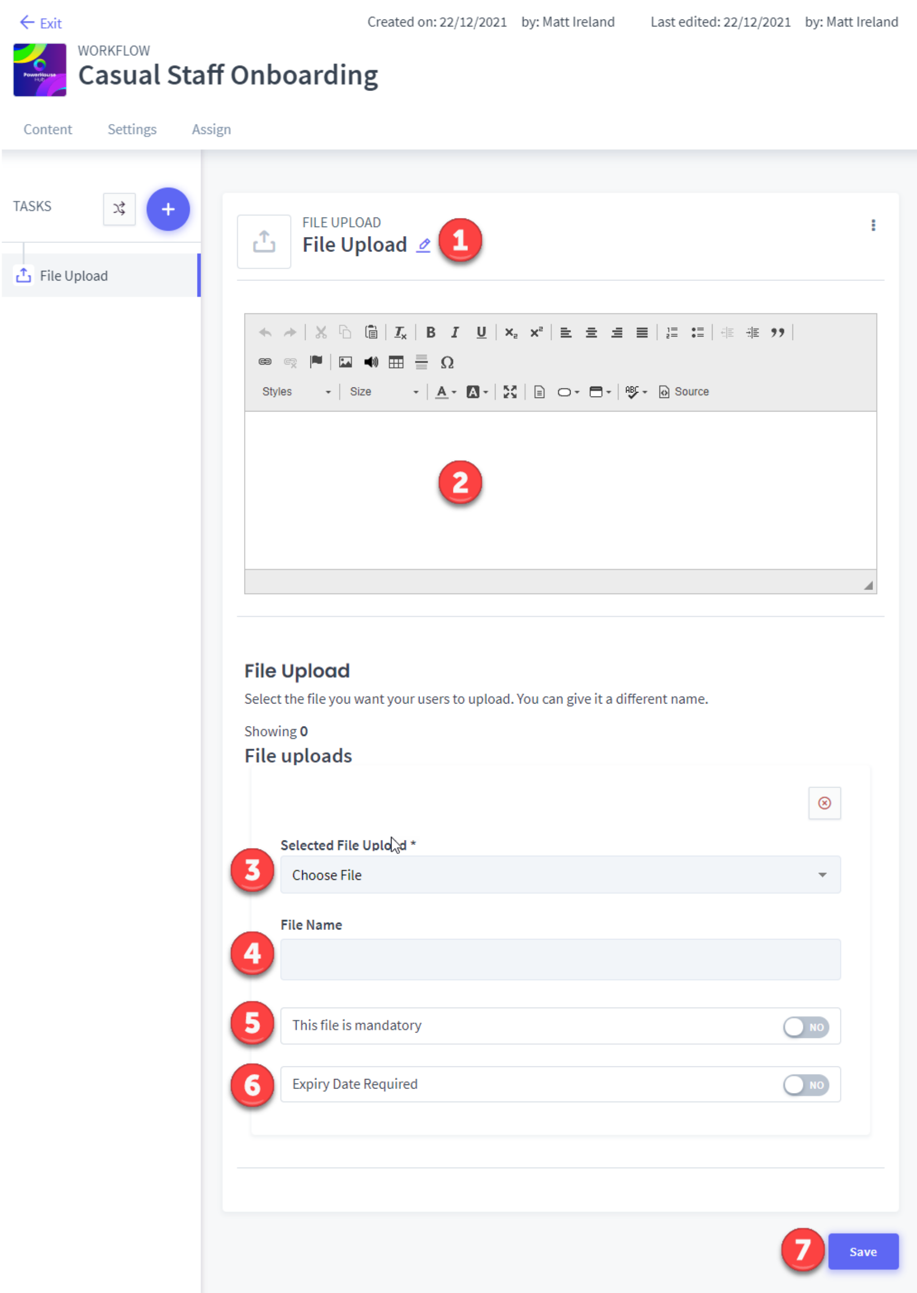
3.2.3 File Uploads

File Uploads is where candidates can upload documents to ensure their business is compliant.

Before populating this task, ensure you have created files for your candidates to upload in the File Uploads module

1. To change the title, click the edit icon, type in the desired title and click save button
2. Provide a general introduction in the CK Editor that explains what you want the user to do
3. Select the file upload
4. Name the file
5. Toggle YES if you want the file upload to be mandatory
6. Toggle YES is if the file has an expiry date. i.e drivers license and CPR certificates have an expiry date

7. Click Save to save changes. To add an additional File upload task to your workflow add another File Upload workflow item.

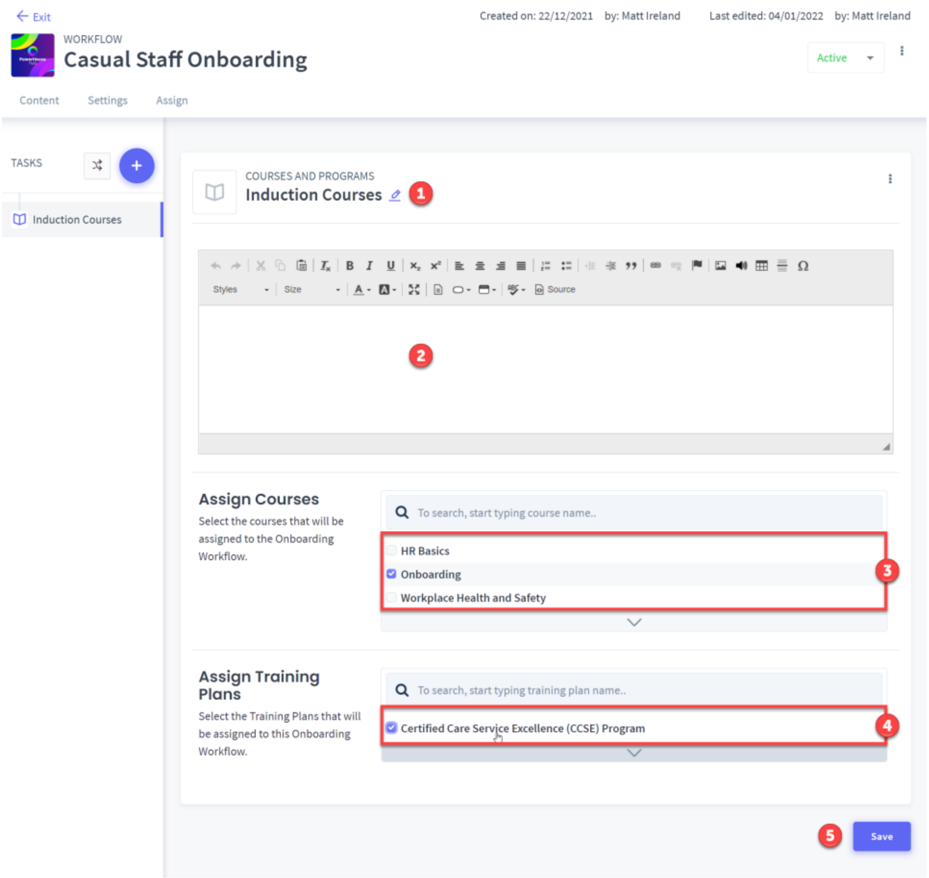


3.2.4 Induction Courses

This is where your candidates can complete relevant induction courses prior to commencing their employment.

Before populating this task, ensure you have created courses and learning programs for your candidates to complete. You can do this through the Content Publisher and Training Plan Manager modules.

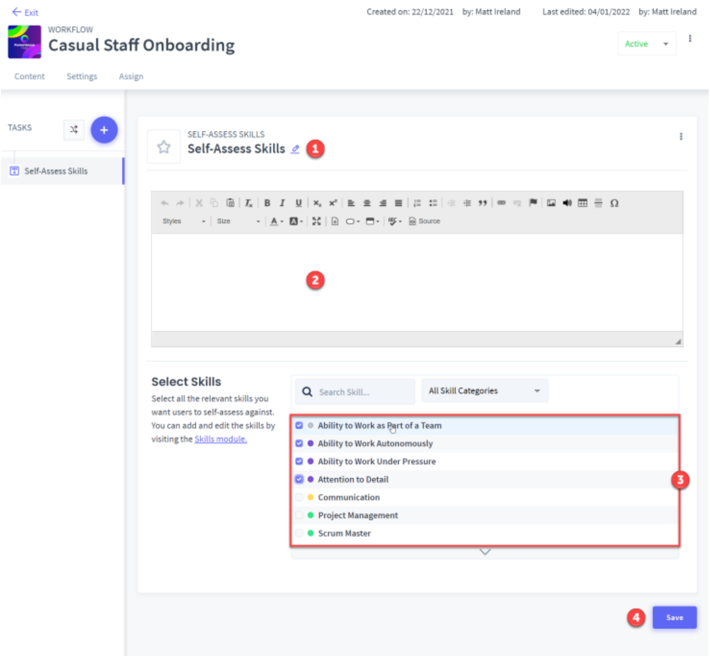
1. To change the title, click the edit icon, type in the desired title and click save button
2. Provide a general introduction in the CK Editor that explains what you want the user to do
3. Select the course(s) that will be assigned to the workflow
4. Select the Training Plans that will be assigned to the workflow
5. Click Save to save changes.



3.2.5 Self-Assessed Skills

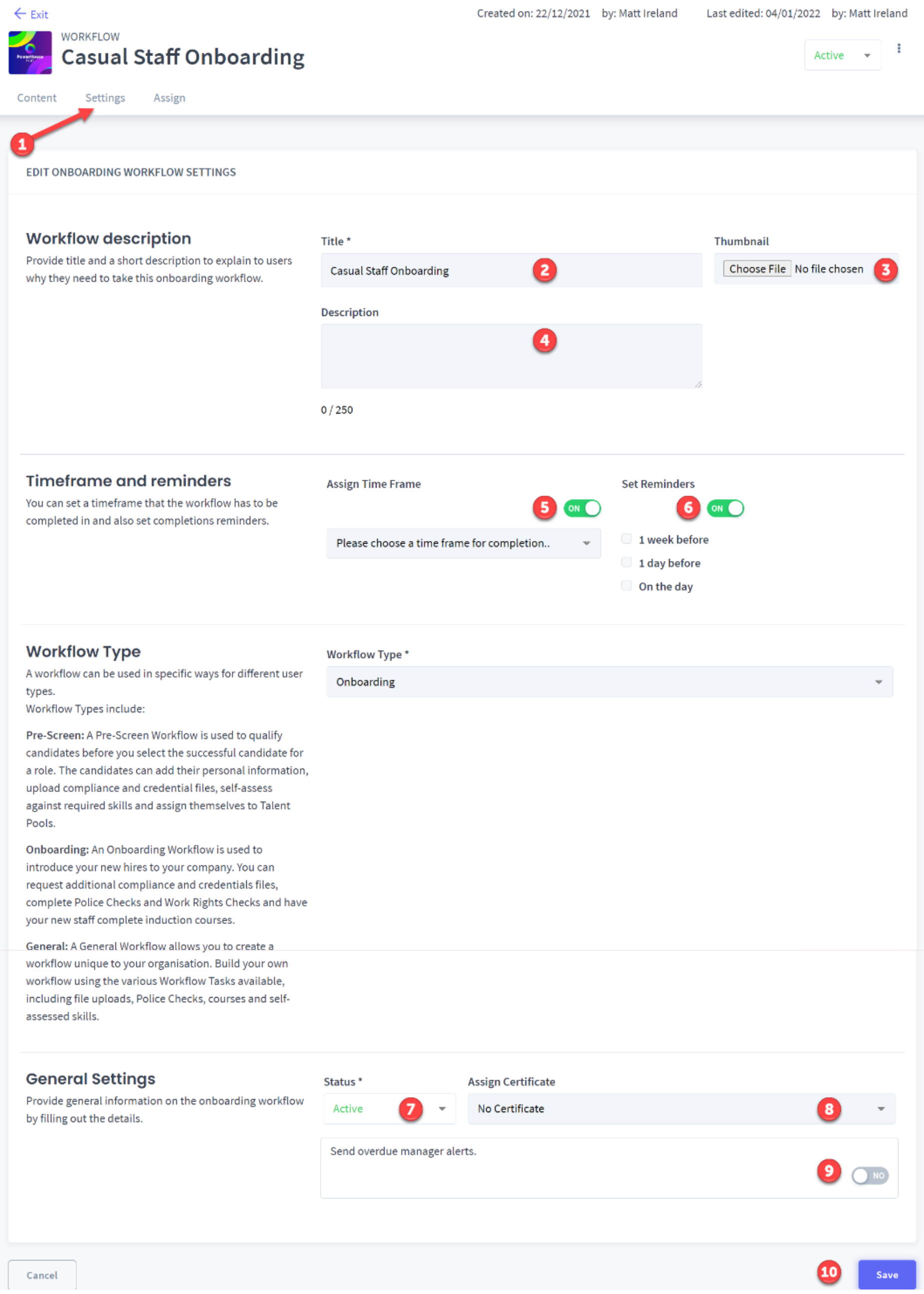
This is where your candidates can self-assess themselves against the skills that you require for the role. Before populating this task, ensure you have created the required skills in the Skills module.

1. To change the title, click the edit icon, type in the desired title and click save button
2. Provide a general introduction in the CK Editor that explains what you want the user to do
3. Select all the relevant skills you want users to self-assess against
4. Click Save to save changes



3.2.6 Workflow Settings

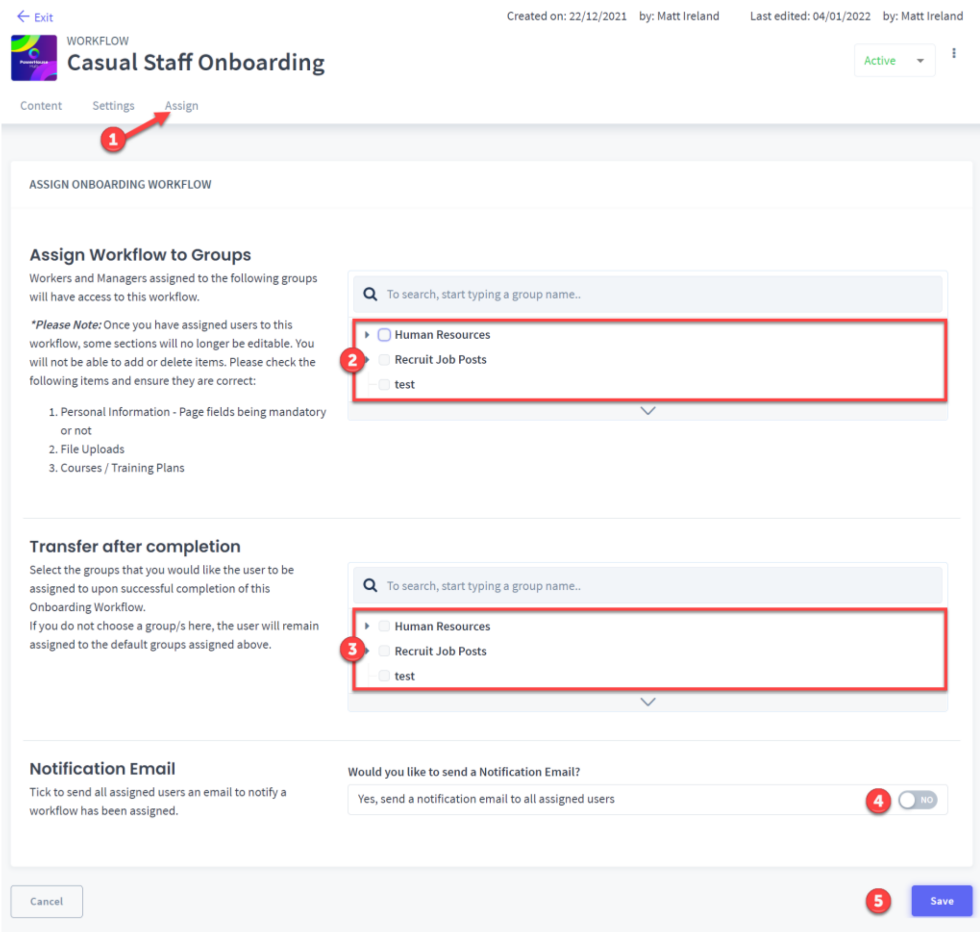
1. To edit the settings, click on the Settings link
2. Click in the Title field if you need to make any changes
3. This is the image that will be shown to users on their dashboard. Click Choose file and select relevant file
4. Click in the Description field if you need to make any changes
5. Toggle ON and select a timeframe for completion if required
6. Toggle ON and select the relevant reminder
7. Ability to change the Status. Active means workflow is live and can be viewed by the learner. Disabled means users wont be able to see the workflow on their dashboard
8. Assign a certificate from the drop down box
9. Toggle ON to send overdue alerts to the user's manager
10. Click Save to save changes



3.2.7 Assigning Workflow's

Please Note: Once you have assigned users to this workflow, some sections will no longer be editable. You will not be able to add or delete items.

1. To assign a workflow to the relevant groups, click the Assign link
2. Assign the group that workers and Managers that will have access to
3. Select the groups that you would like the user to be assigned to upon successful completion of this workflow
4. Toggle YES to send a notification email to all assigned users
5. Click Save to save changes



4. Upskilling

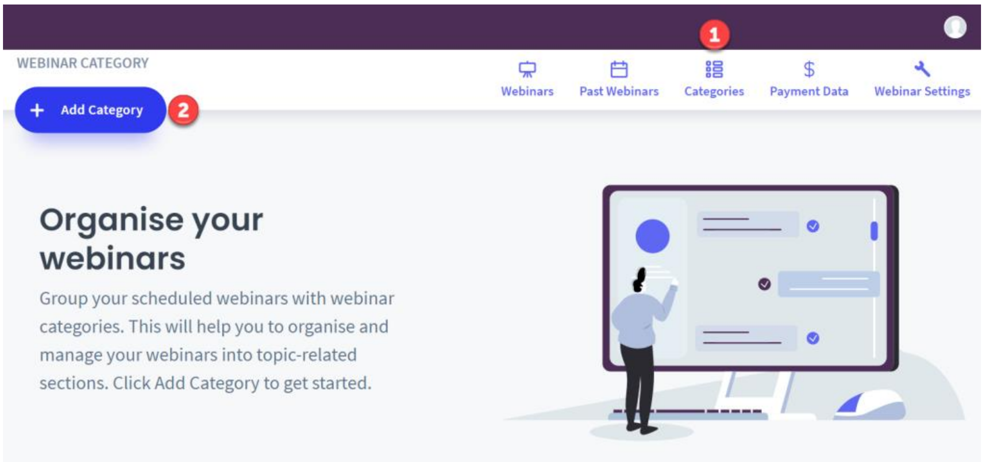
4.1 Webinar Manager

The webinar manager is a digital alternative to the Events module. The Webinar Manager enables you to organise and host CPD webinars and online seminars. Fill out the webinar form with the start date and time, cost, certificate and then assign it to your user groups.

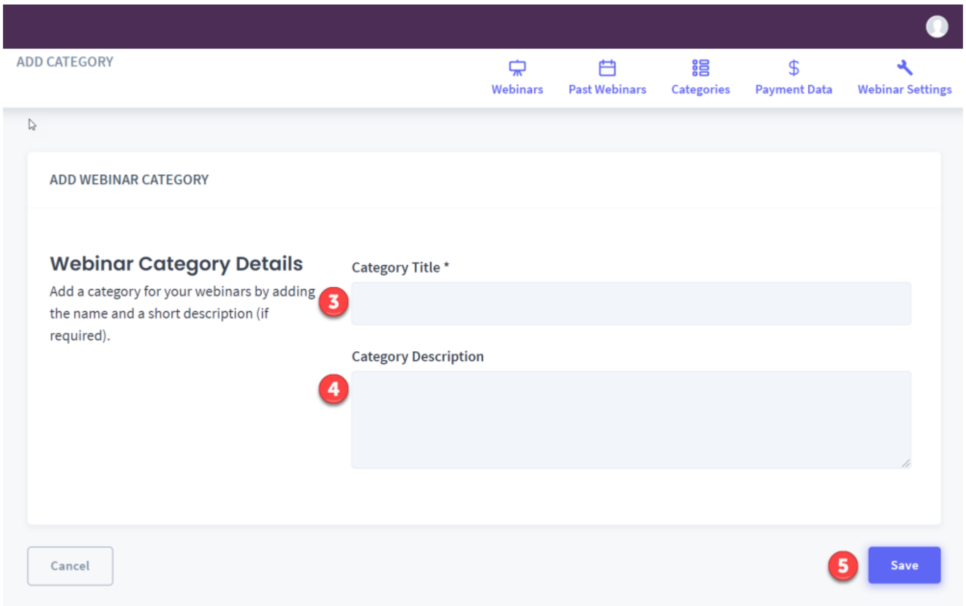
4.1.1 Creating categories

Categories are used to create structure in the Webinar Manager. Categories help to organise and manage webinars into topic related sections.

1. Select Categories tab
2. Click Add Category

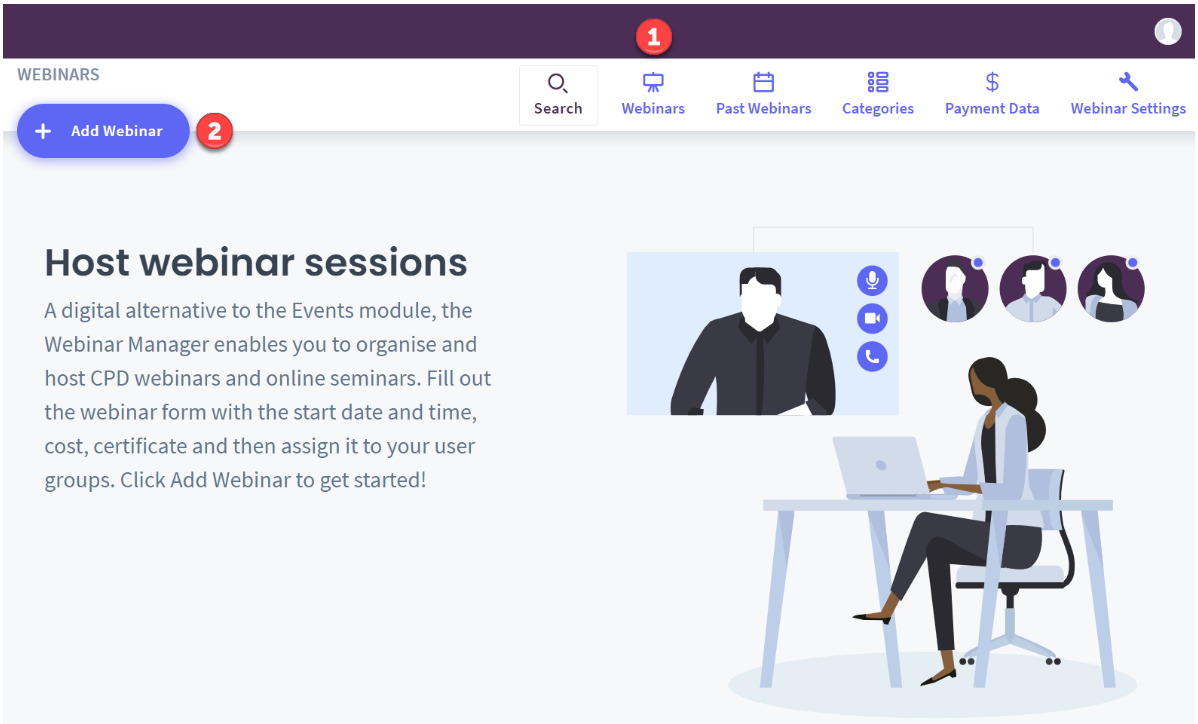


3. Add the category title
4. Add a category description
5. Click Save to save changes

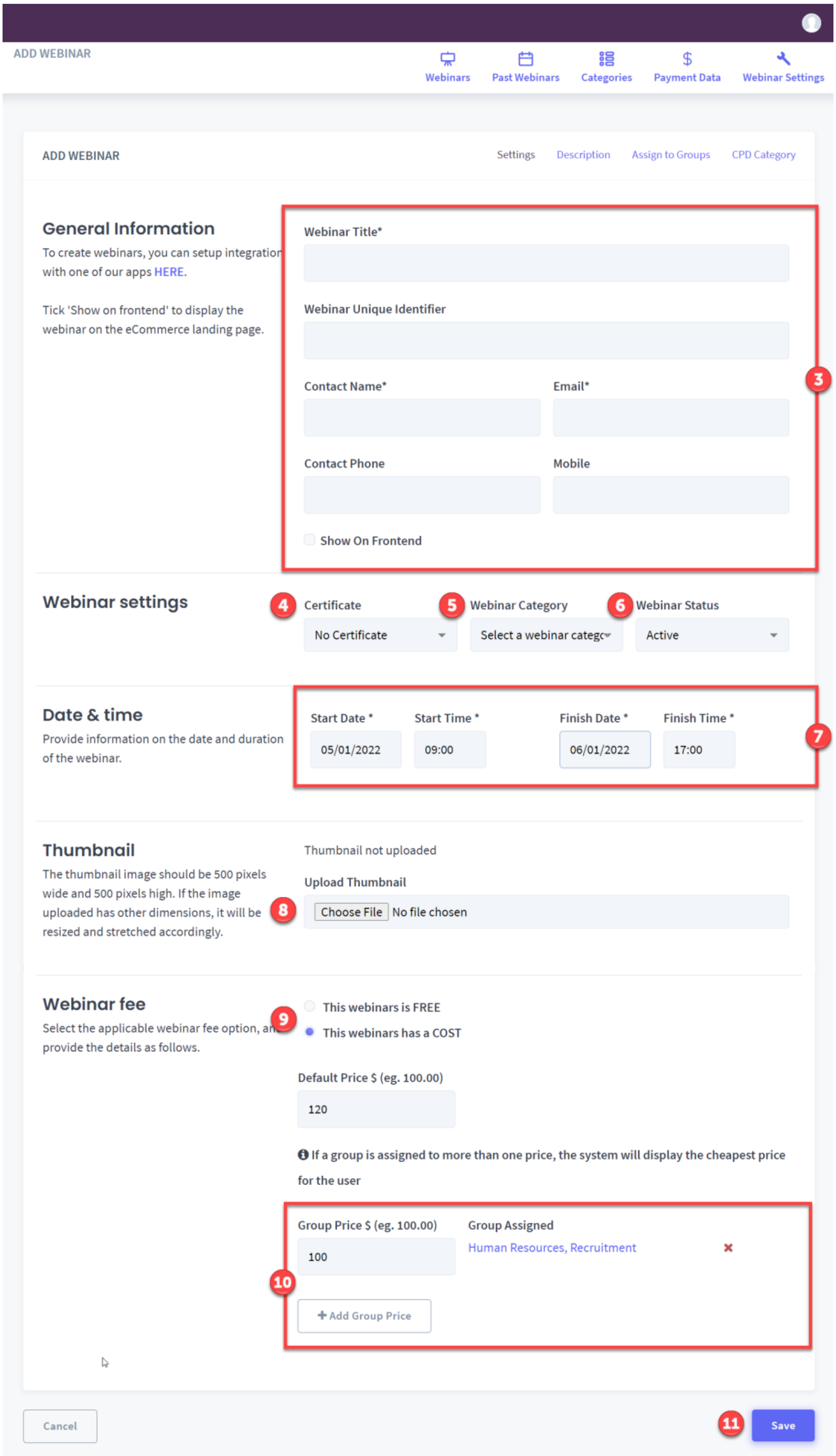


4.1.2 Add Webinar

1. Click on the webinars tab
2. Click add webinar

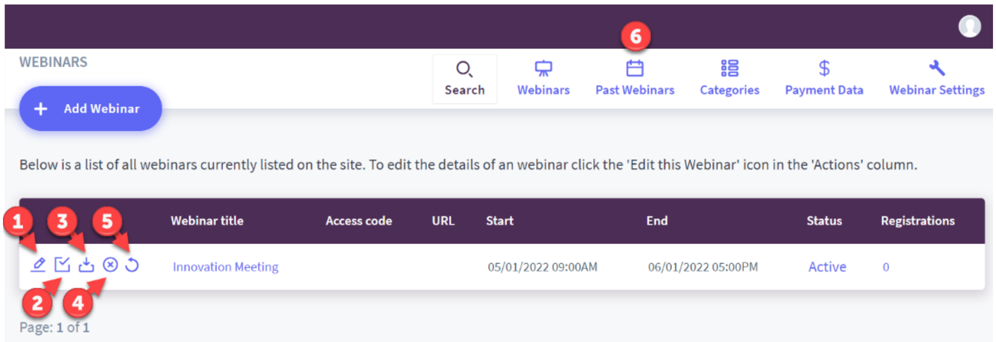


3. Complete fields in General Information. If Show On Frontend tick box is selected, the webinar will be displayed on the login screen.
4. Select if the user will receive an attendance certificate after watching the webinar
5. Assign Webinar to the relevant category
6. Set Webinar Status. **Active** means the users can view and register for the webinar. **Disabled** means the user won't be able to
7. Set the date and time for the webinar
8. Click choose file to upload an image. The user will see the image on their portal
9. Select the applicable fee option for the webinar
10. If the Webinar has a fee you are able to set a different price per group. To do this, click add group price, enter a price and assign to a group. This can be done multiple times
11. Click Save to save changes


ADD WEBINAR
Webinars
Past Webinars
Categories
Payment Data
Webinar Settings
ADD WEBINAR
Settings
Description
Assign to Groups
CPD Category
General Information
To create webinars, you can setup integration with one of our apps HERE.
Tick 'Show on frontend' to display the webinar on the eCommerce landing page.
Webinar Title*
Webinar Unique Identifier
Contact Name*
Email*
Contact Phone
Mobile
Show On Frontend
3
Webinar settings
4
Certificate
No Certificate
5
Webinar Category
Select a webinar catego
6
Webinar Status
Active
Date & time
Provide information on the date and duration of the webinar.
Start Date *
05/01/2022
Start Time *
09:00
Finish Date *
06/01/2022
Finish Time *
17:00
7
Thumbnail
The thumbnail image should be 500 pixels wide and 500 pixels high. If the image uploaded has other dimensions, it will be resized and stretched accordingly.
Thumbnail not uploaded
Upload Thumbnail
8
Choose File No file chosen
Webinar fee
Select the applicable webinar fee option, and provide the details as follows.
9
This webinars is FREE
This webinars has a COST
Default Price $ (eg. 100.00)
120
If a group is assigned to more than one price, the system will display the cheapest price for the user
Group Price $ (eg. 100.00)
100
Group Assigned
Human Resources, Recruitment
10
+ Add Group Price
Cancel
11
Save

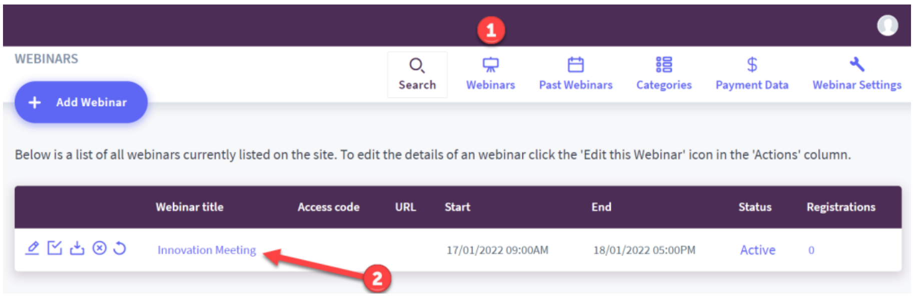
4.1.3 Webinar Action Buttons

1. Allows the Webinar Details to be edited. Also, there is a new option called Tag This Webinar to a Skill, which awards attendees these skills after they watch the webinar
2. Mark Attendance. This can only be done once the Webinar date has passed using Past Webinars tab (6)
3. Download Attendee List. This can only be done after attendance has been marked
4. Delete this webinar
5. Sync Webinar with Zoom Meeting. Ensure Zoom integration has been enabled in App Store

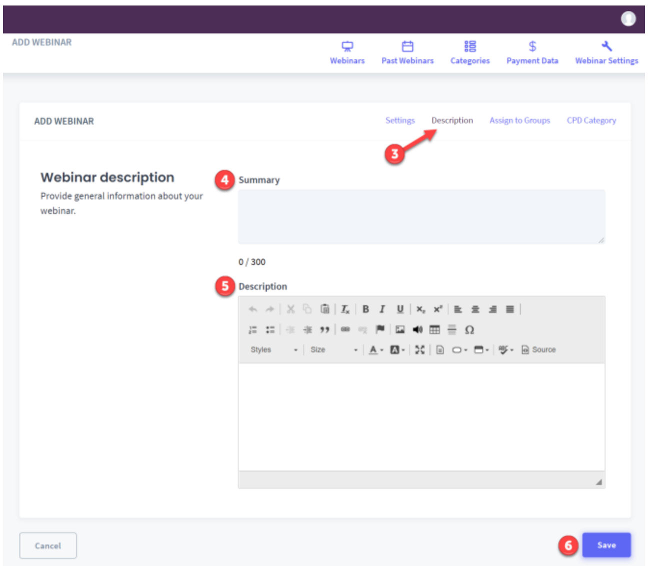


4.1.3 Webinar Description

1. Click the webinars tab
2. Click on the webinar title



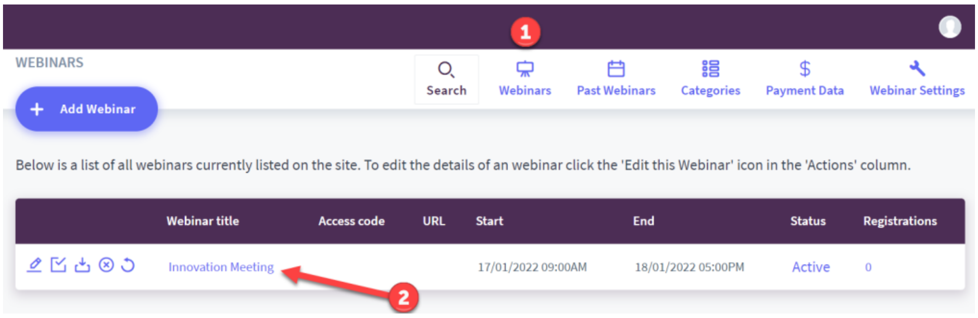
3. To add a description, click on the Description link
4. Add a summary. This will display inside the webinar thumbnail on the learner portal
5. Add a description. This is what the learners see when they select the See More option
6. Click Save to save changes



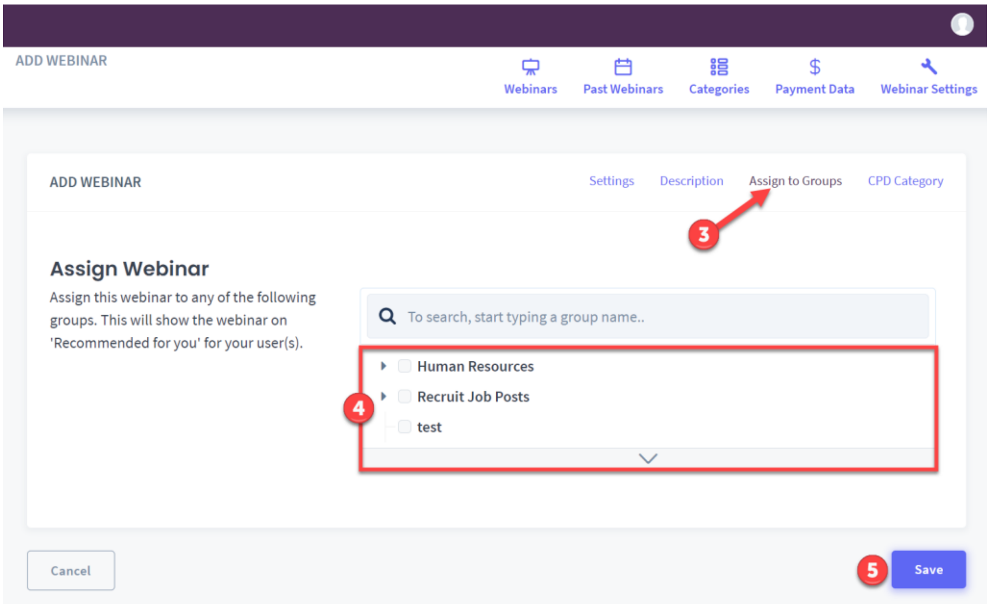
4.1.4 Assign Webinar to groups

This enables the webinar to be assigned to relevant groups. Learners from the selected groups can then register and attend the webinar.

1. Click the webinars tab
2. Click on the webinar title



3. To assign the webinar to relevant groups, click on the Assign to Groups link in the top right menu
4. Select the relevant groups
5. Click Save to save changes

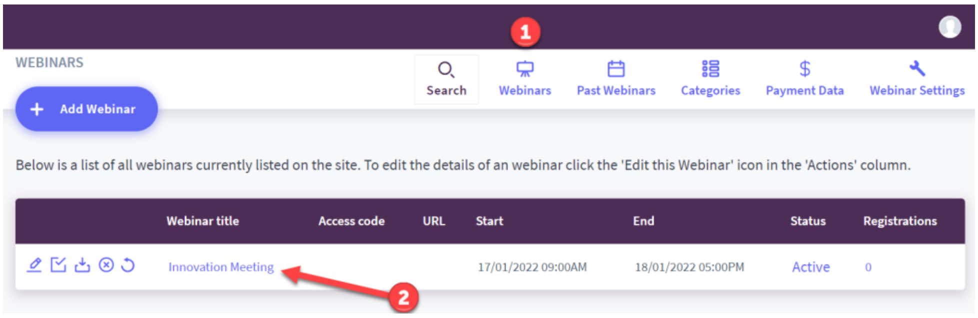


4.1.5 CPD Category

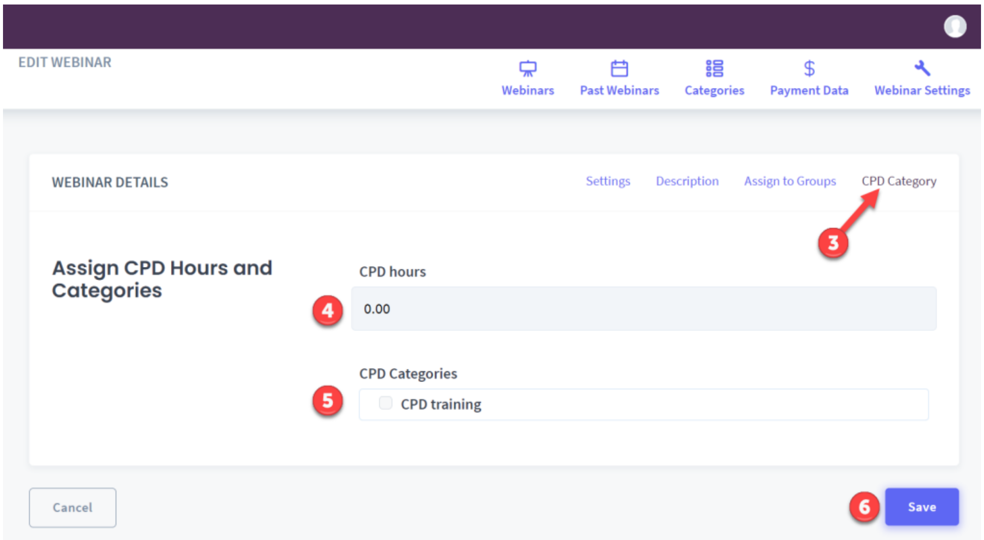
CPD Settings need to be enabled for the CPD Category link to appear. To activate this, navigate to the Setting module, and select CPD from the Platform dropdown.

To set the CPDE Category:

1. Click the webinars tab
2. Click on the webinar title



3. Click the CPD Category link
4. Enter the CPD hours
5. Select the CPD Category
6. Click Save to save changes



4.2 Event Manager

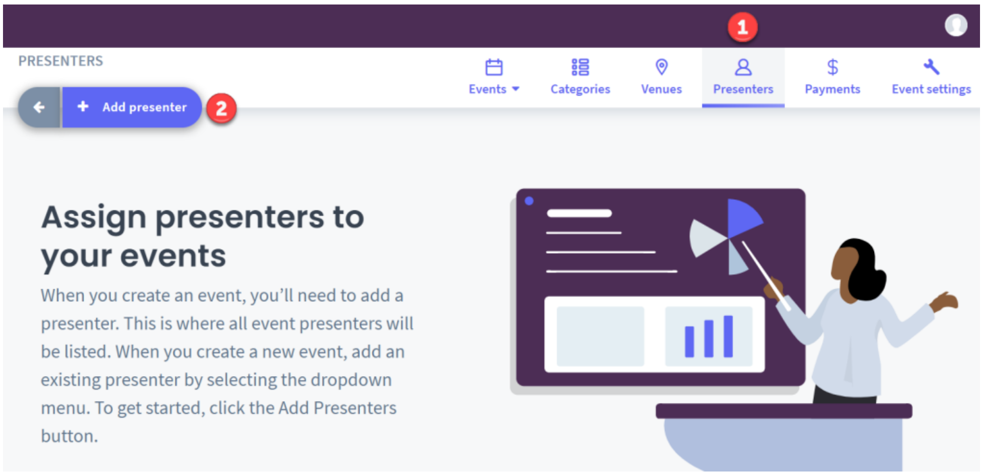
The Event Manager allows you to create and manage face-to-face training sessions, seminars and instructor-led learning. See a snapshot of attendance and waitlists at any time with powerful reporting capabilities. Fill out all applicable fields, including cost, venue and presenter, and then assign the event to your user groups.

You will need to pre create venues, presenters and event categories before you can add an Event.

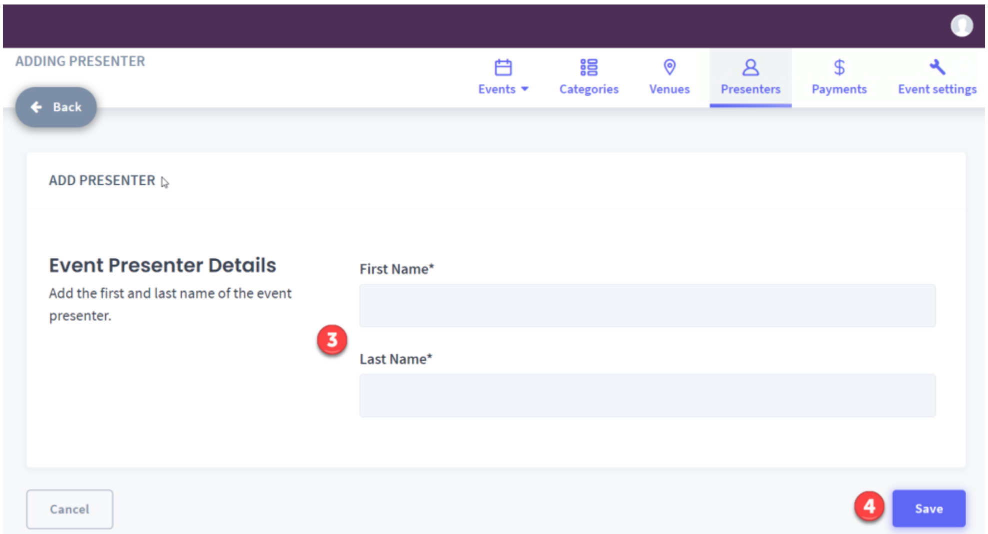
4.2.1 Presenters

This is where all event presenters are listed. When you create a new event, you can add an existing presenter by selecting the dropdown menu.

1. Click the Presenters tab
2. Click add Presenter



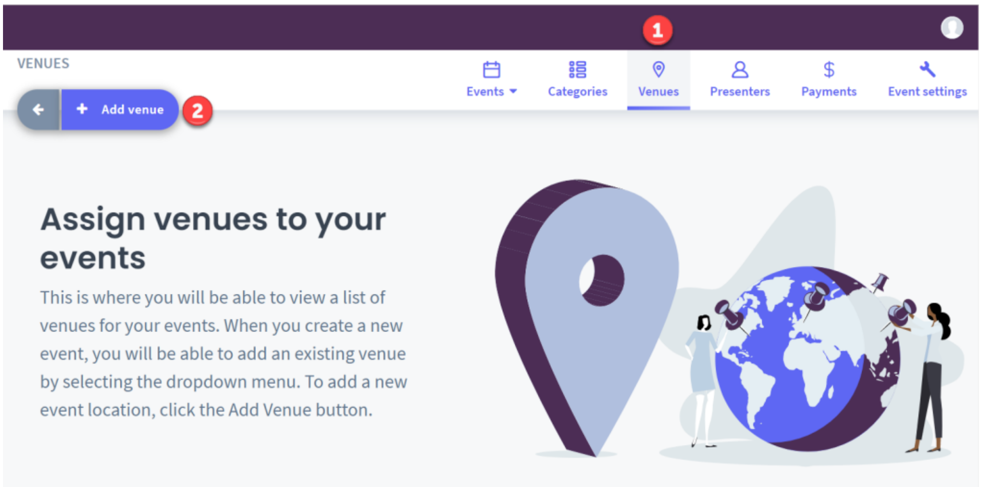
3. Fill in the first and last name of the presenter
4. Click Save to save changes



4.2.2 Venues

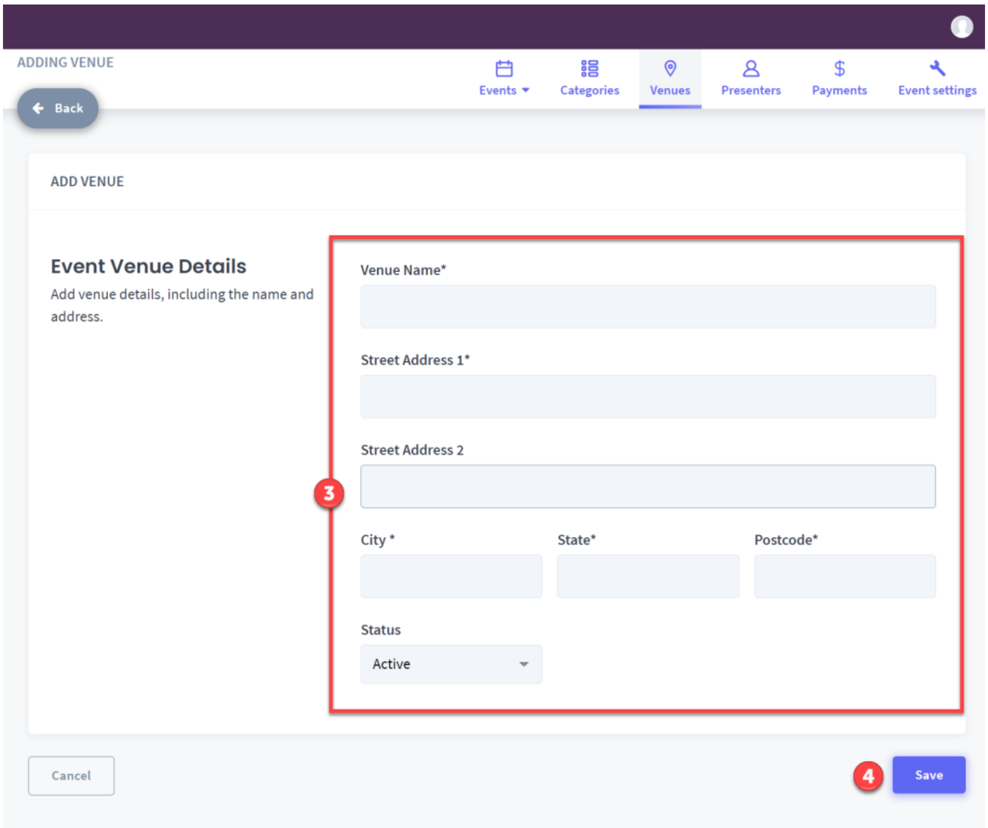
This is where all venues are listed. A new event can be added to an existing venue, or a new event location can be created. To add a new venue:

1. Click the Venues tab
2. Click add venue



3. Add relevant information

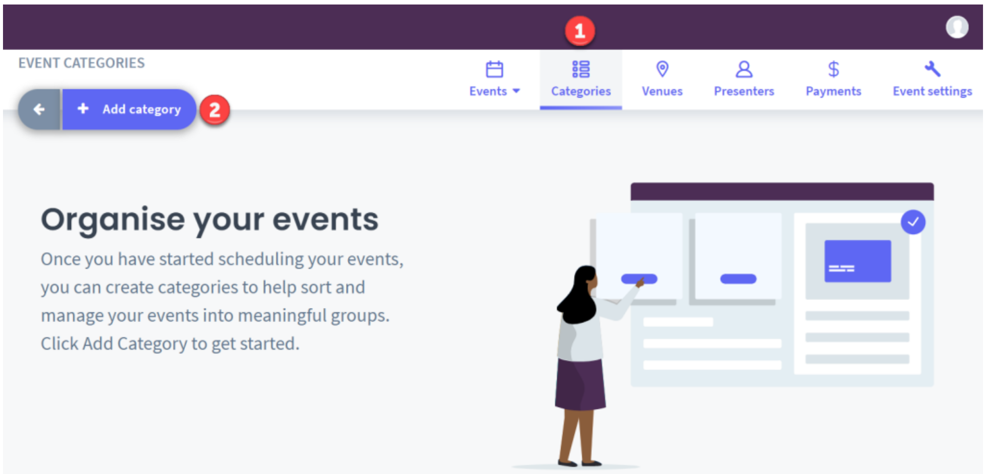
4. Click Save to save changes



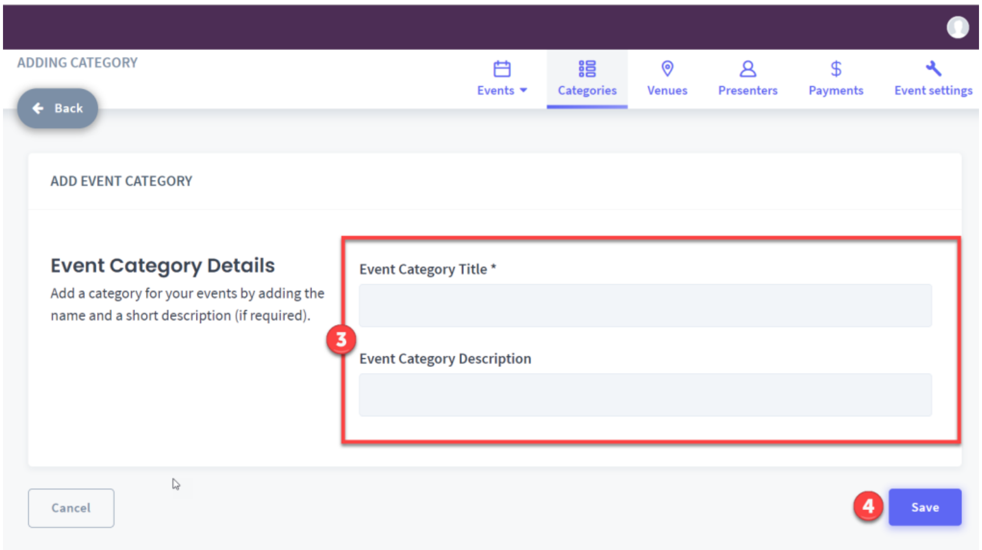
4.2.3 Categories

Categories help to sort and manage events into meaningful groups.

1. Click the Categories tab in top right menu
2. Click add category

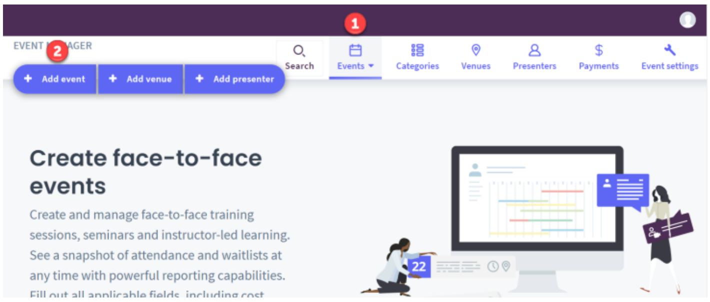


3. Add an event category title and event category description
4. Click Save to save changes

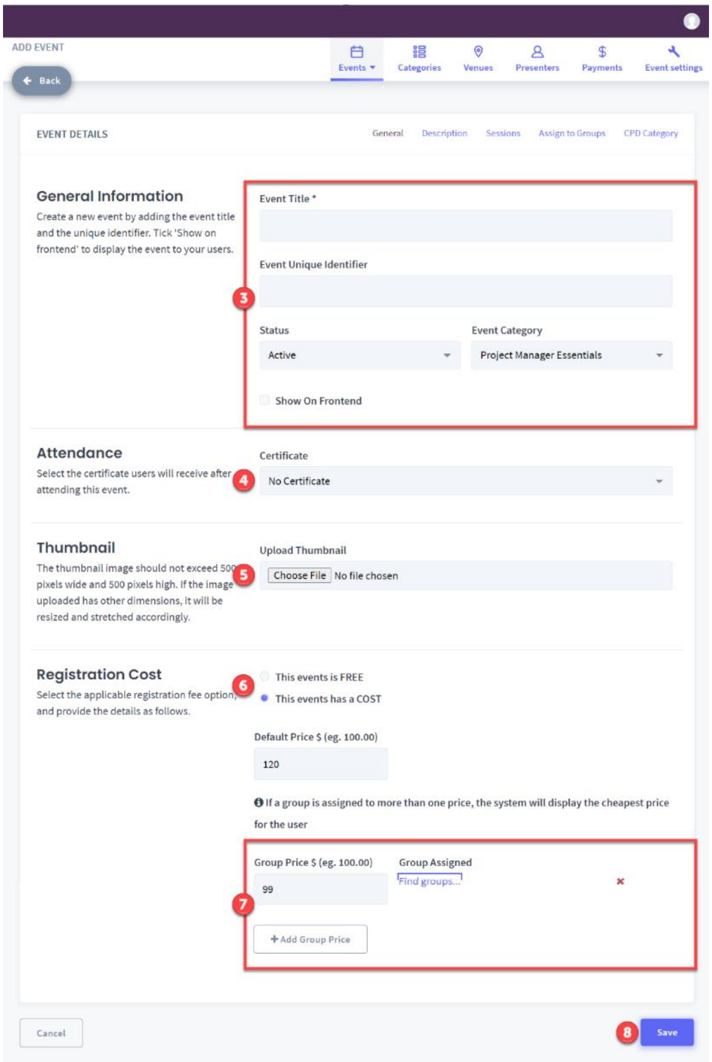


4.2.4 Adding an Event

1. Click the Events tab and click Upcoming/active events from the drop down
2. Click Add event

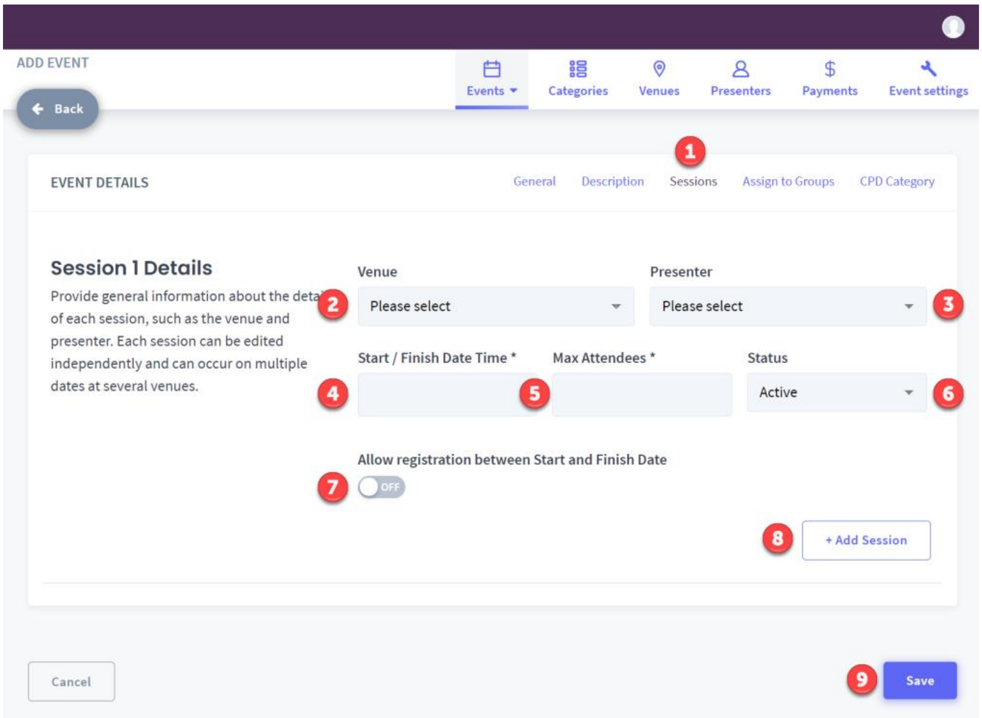


3. Complete fields in General Information section. If Show On Frontend tick box is selected, the event will be displayed on the login screen.
4. Select if the user will receive an attendance certificate after attending the event
5. Click Choose file to upload a thumbnail image
6. Select the applicable fee option for the webinar
7. If the Webinar has a fee, you are able to set a different price per group. To do this, click add group price, enter a price and assign to a group. This can be done multiple times
8. Click Save to save changes



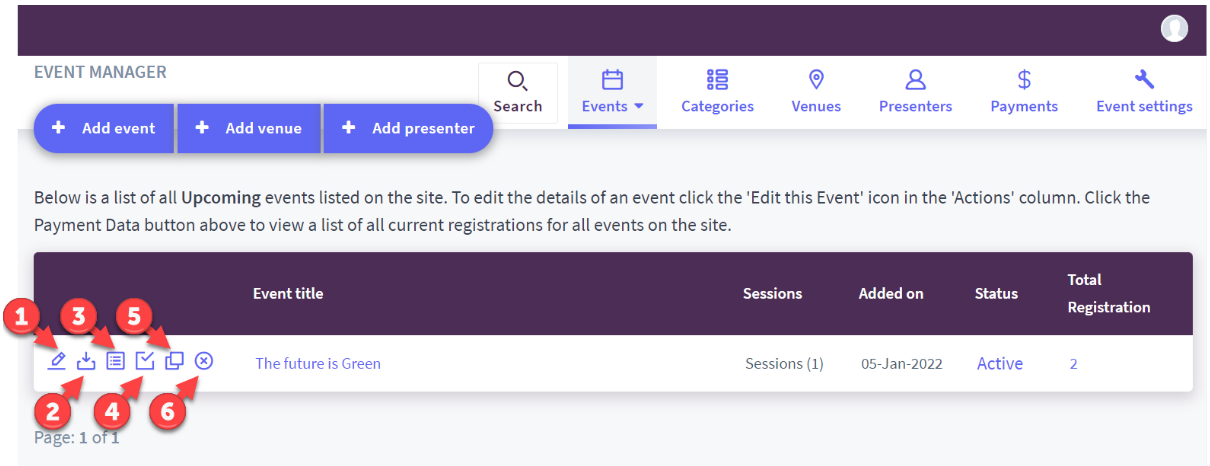
4.2.5 Event Session

1. Click on the Sessions link
2. Select a venue from the drop down
3. Select a presenter from the drop down
4. Add the date and time of the event
5. Set maximum number of attendees
6. Set the status. **Active**: Event is live on the platform and users can register and attend. **Disabled**: Event cannot be seen on the platform.
7. Toggle ON to allow registration between start and finish date
8. If you have multiple sessions of the same event, click Add Session and fill out the details. This can be done multiple times.
9. Click Save to save changes



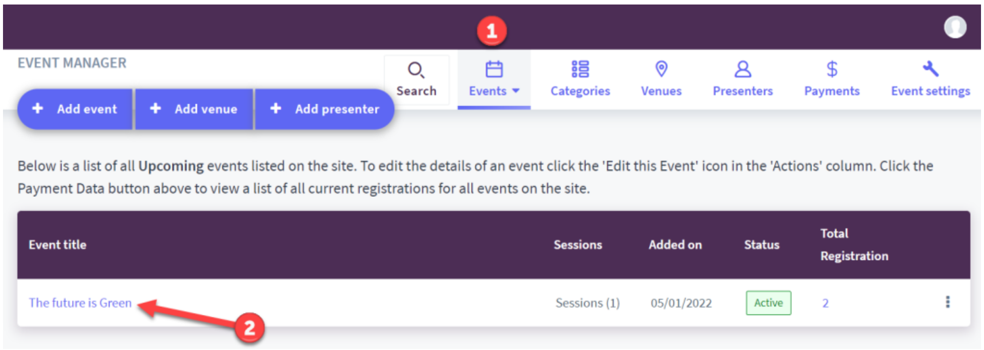
4.2.6 Event Action Buttons

1. Allows the Event Details to be edited. Also, there is a new option called Tag this event to a skill, which awards attendees these skills after they attend the event
2. Download Registration details
3. View Payment Data
4. Mark Attendance. This can only be done once the event date has passed
5. Duplicate Event
6. Delete Event

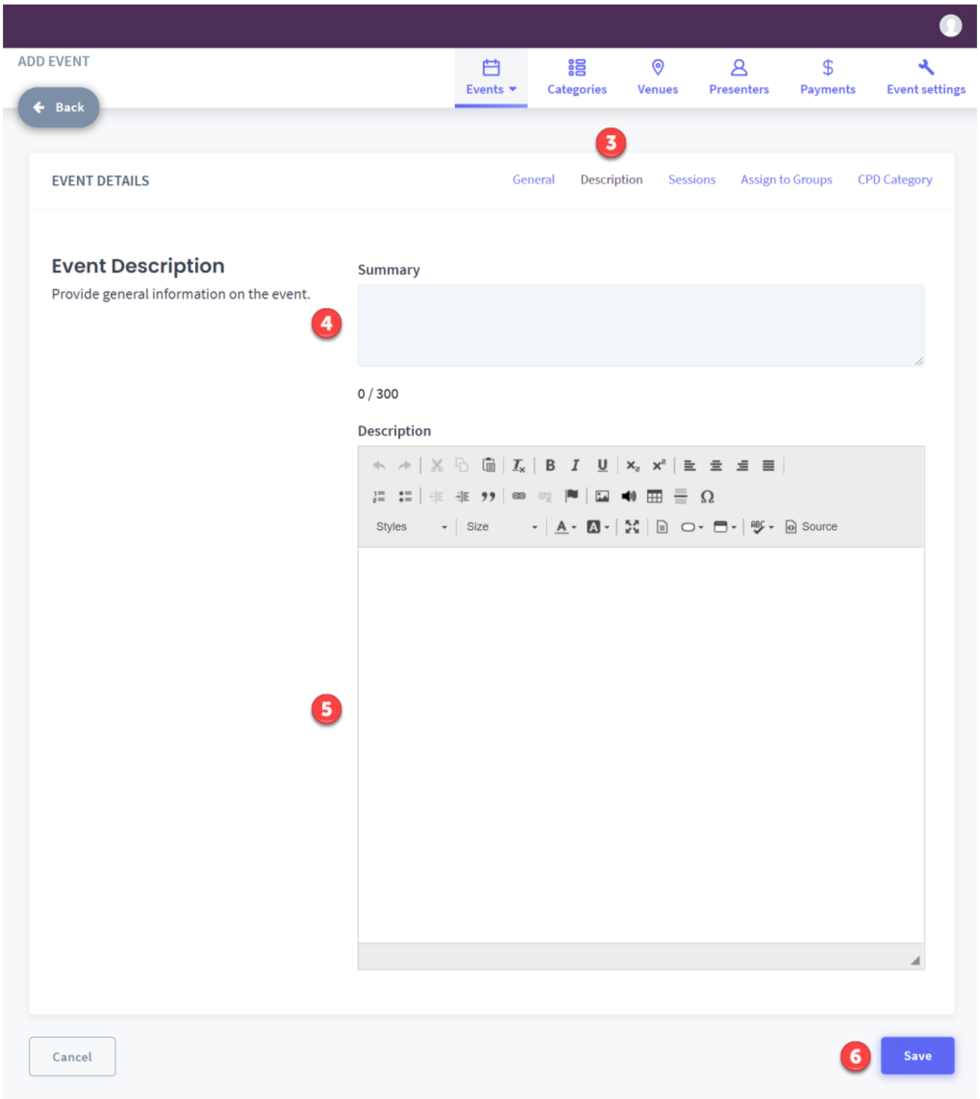


4.2.6 Event Description

1. Click the Events tab and click Upcoming/active events from the drop down
2. Click on the event title

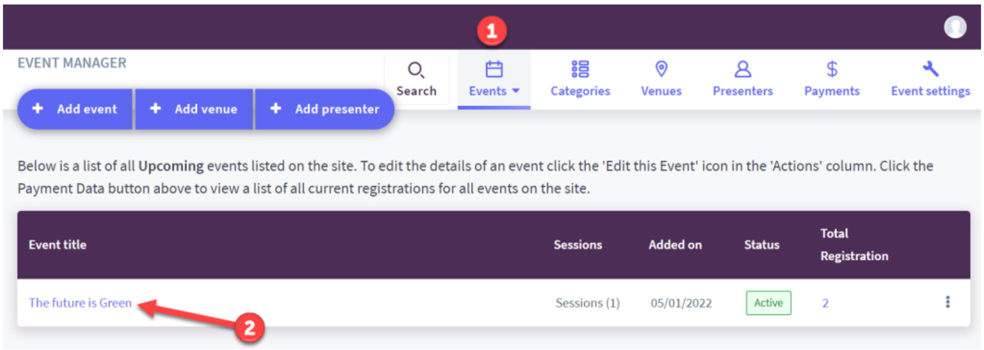


3. To add a description, click on the Description link
4. Add a summary
5. Add a description
6. Click Save to save changes

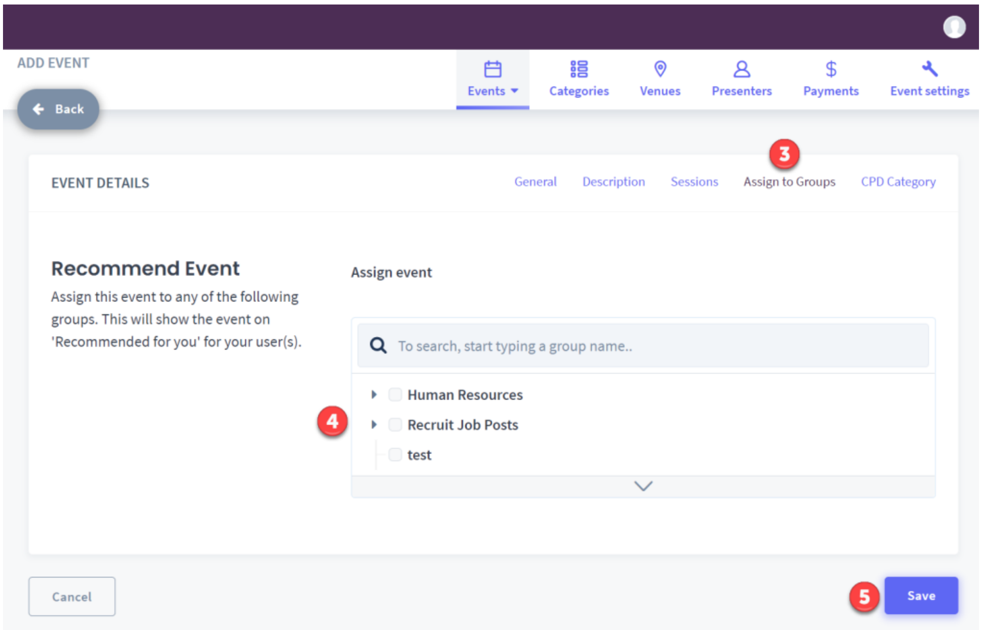


4.2.7 Assign the Event to Groups

1. Click the Events tab and click Upcoming/active events from the drop down
2. Click on the event title



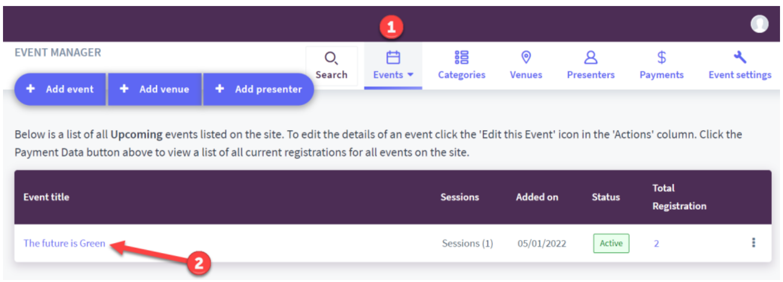
3. Click on the assign to groups link
4. Select the relevant groups
5. Click Save



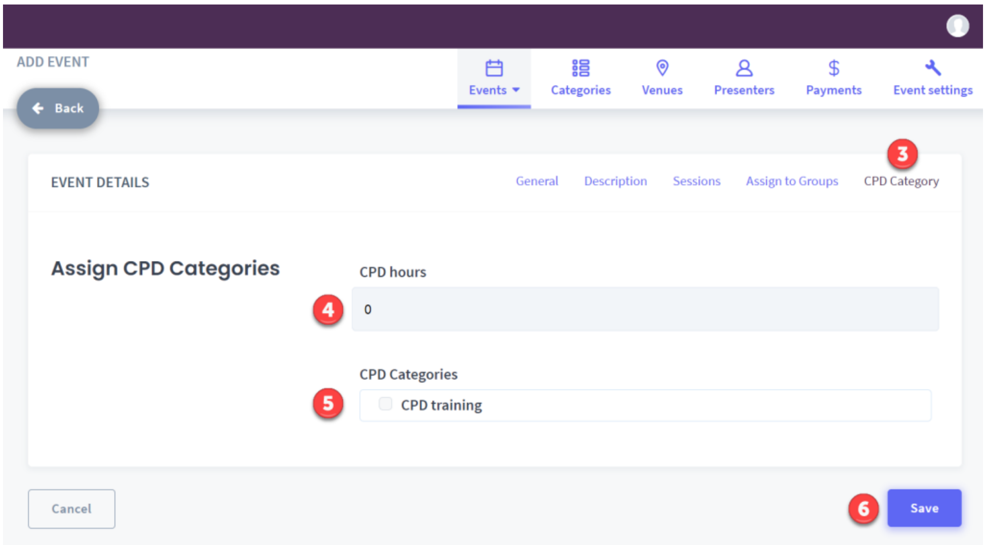
4.2.8 CPD Category

CPD Settings need to be enabled for the CPD Category link to appear. To activate this, navigate to the Setting module, and select CPD from the Platform dropdown.

1. Click the Events tab and click Upcoming/active events from the drop down
2. Click on the event title



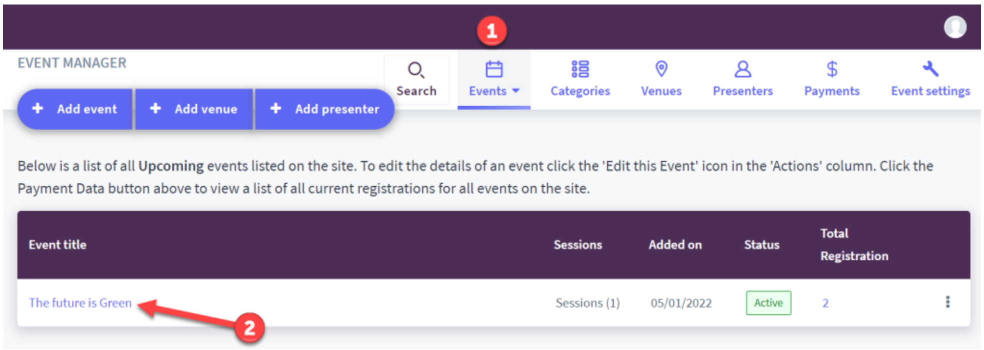
3. Click the CPD Category link
4. Enter CPD hours
5. Select CPD Category
6. Click Save to save changes



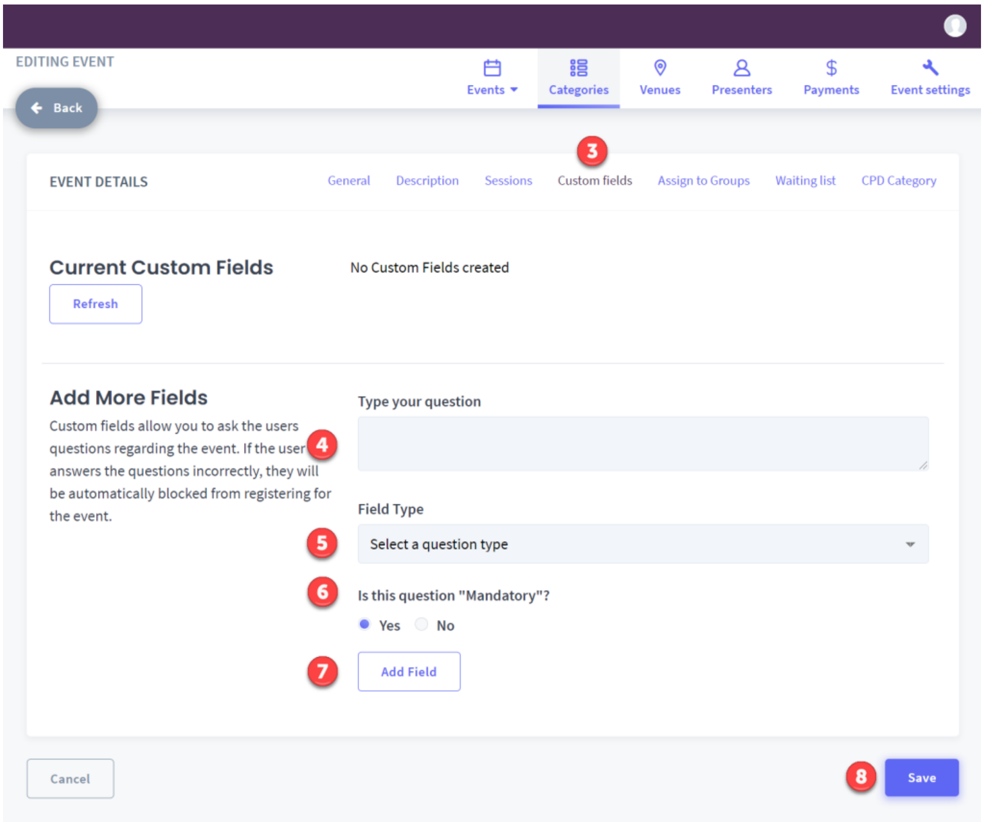
4.2.10 Custom Fields

Custom fields allow you to ask the users questions regarding the event. If the user answers the questions incorrectly, they will be automatically blocked from registering for the event.

1. Click the Events tab and click Upcoming/active events from the drop down
2. Click on the event title



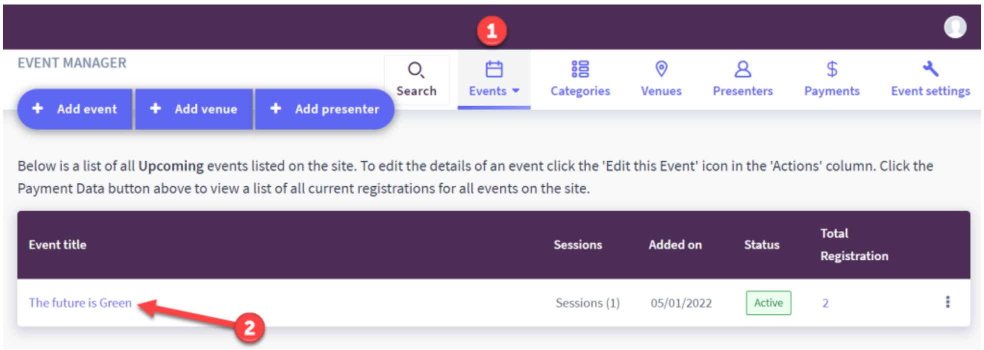
3. Click on the Custom Fields link
4. Type your question
5. Select a question type
6. Select if the question is mandatory
7. Click Add Field to add another question
8. Click Save to save changes



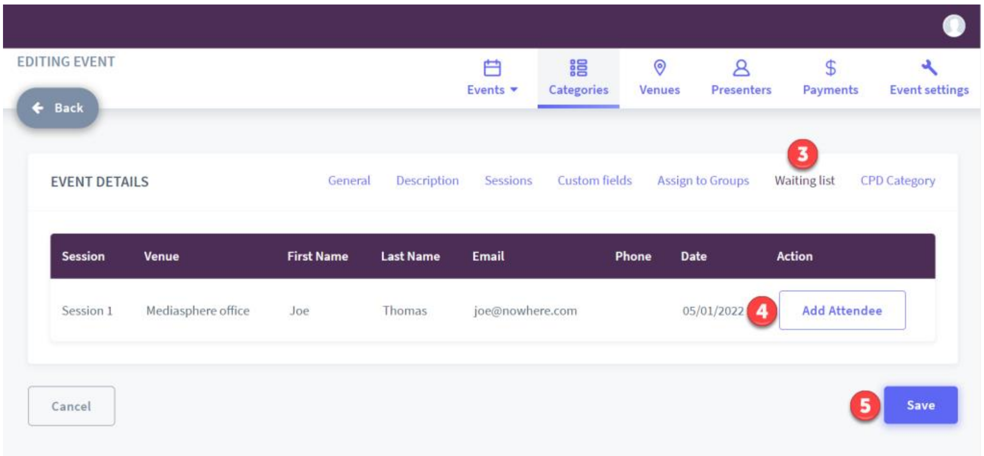
4.2.11 Waiting List

This is where you can view a list of all the learners who have applied to register for the waiting list for this event, as the maximum attendees has been reached. However, if you go back to the Sessions tab and change the max attendees, you are now able to register the learner to this session by selecting the Add Attendee button when inside the Waiting List tab.

1. Click the Events tab and click Upcoming/active events from the drop down
2. Click on the event title

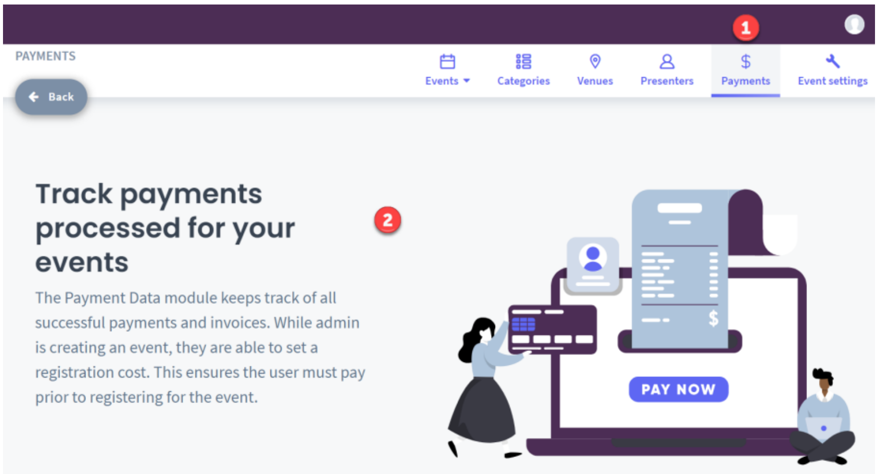


3. Click on the Waiting list link
4. Click add attendee to add them to the event
5. Click Save to save changes



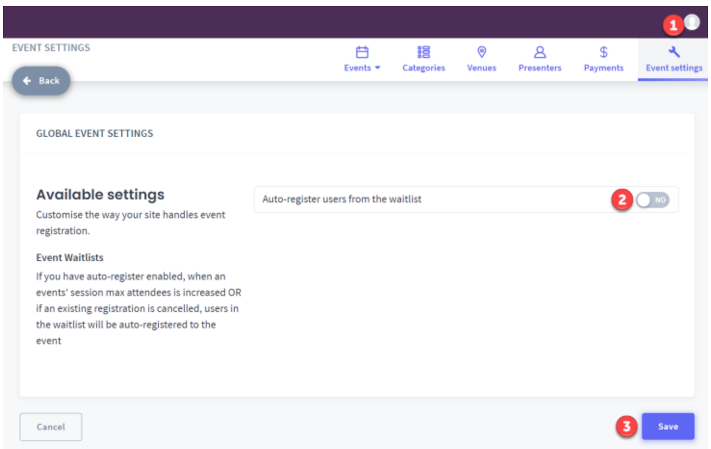
4.2.12 Event Payments

1. Click on the payments tab
2. Once a learner has purchased an event from their portal the payment information will be displayed



4.2.13 Event Settings

1. Click on the Event settings tab
2. Toggle ON to enable auto-register from the wait list. This will come into effect when an events' session max attendees is increased OR if an existing registration is cancelled, users in the waitlist will be auto-registered to the event
3. Click Save to save changes

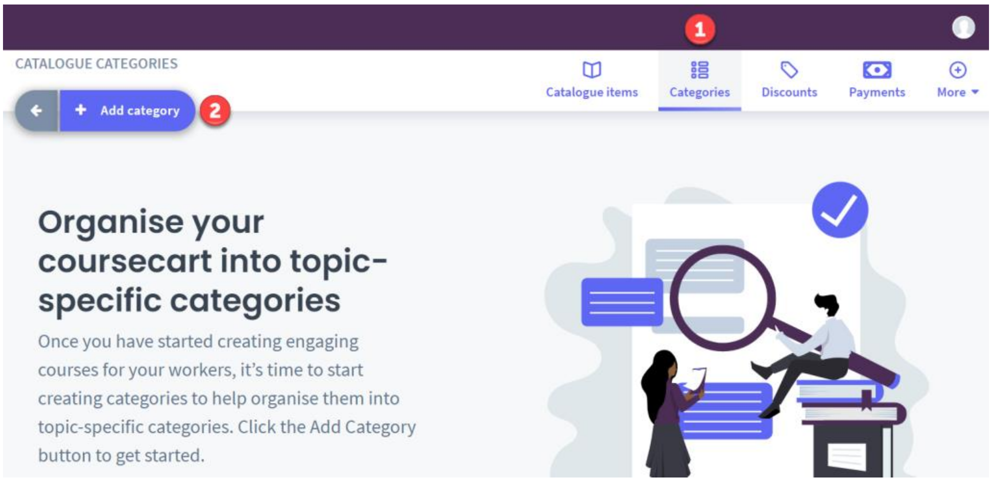


4.3 Course Catalogue

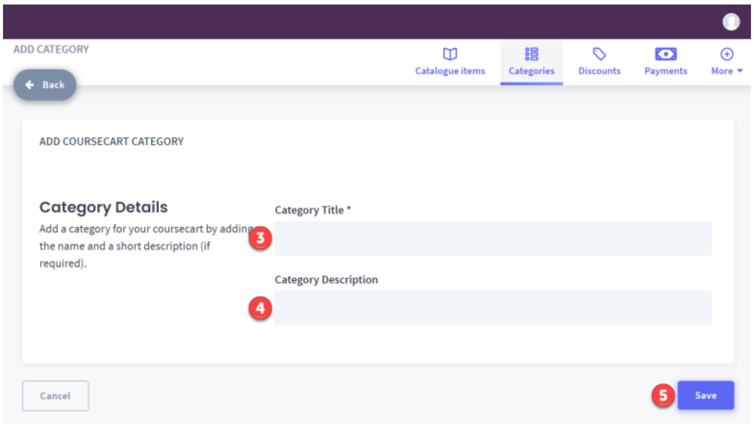
The Course Catalogue allows you to add and sell courses via the Buy Courses module on the learner portal.

4.3.1 Adding a course category

1. Click on the categories tab
2. Click add category

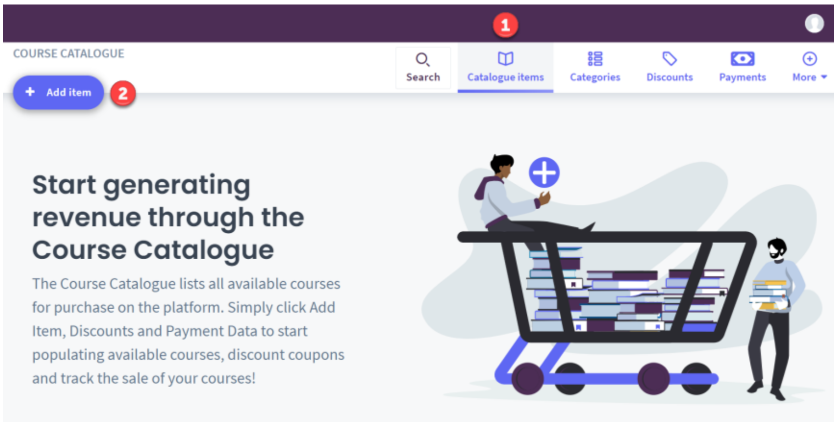


3. Add Category Title
4. Add Category Description
5. Click Save to save changes

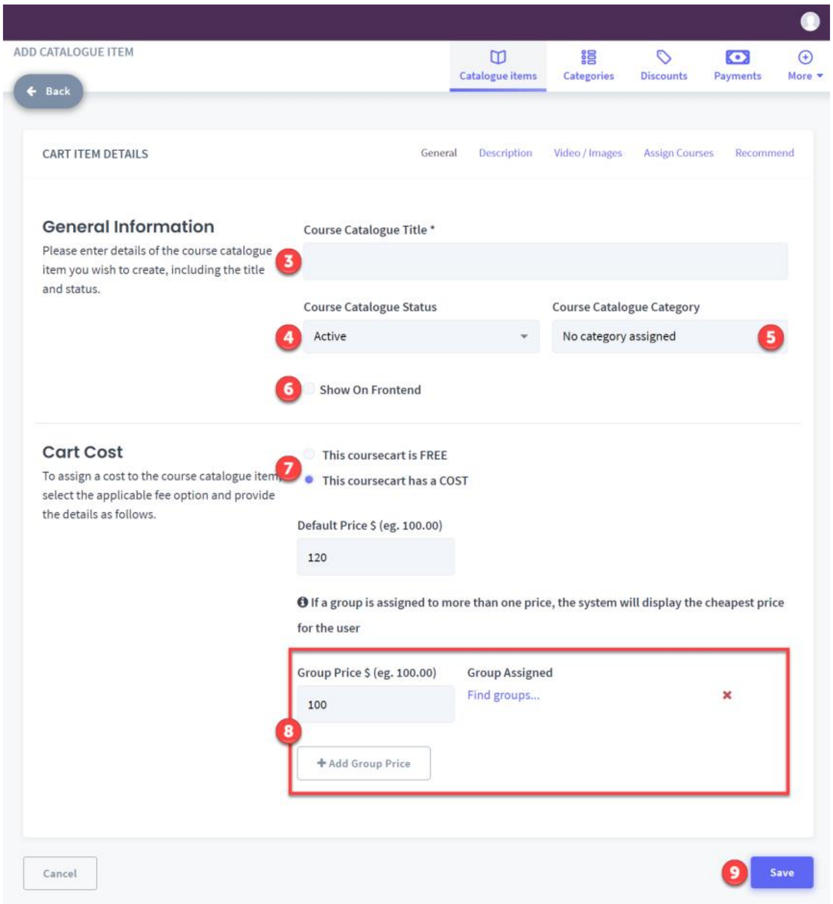


4.3.2 Add Course Catalogue Item

1. Click catalogue items
2. Click add item

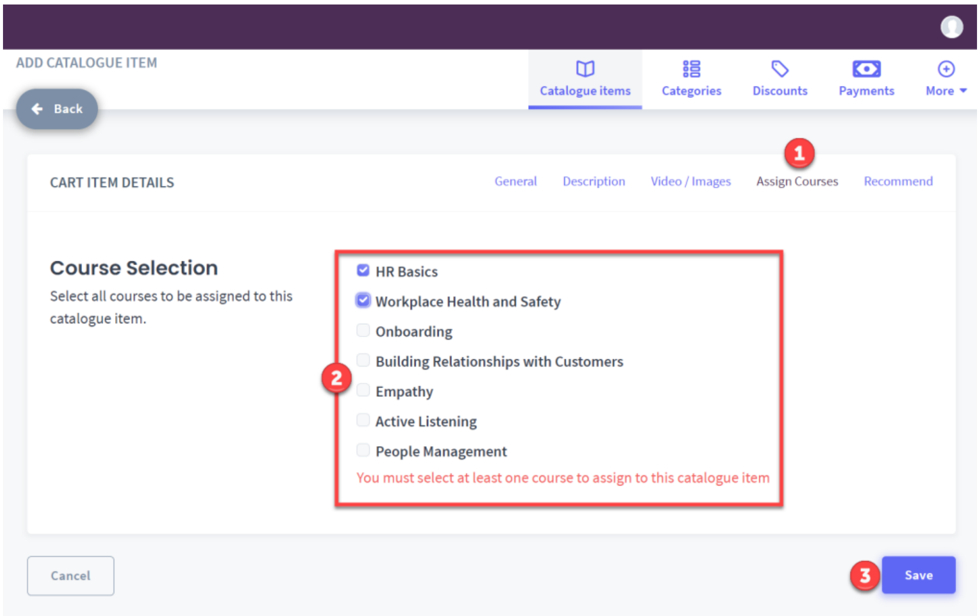


3. Add a course title
4. Set course catalogue status. **Active** means the course can be purchased from learner portal. **Disabled** means the user be able to see the course on the portal.
5. Assign Course to the relevant category
6. Select tick box to show on the front end of the platform
7. Select the if the course if free or has a cost.
8. If the course has a fee you are able to set a different price per group. To do this, click add group price, enter a price and assign to a group. This can be done multiple times
9. Click Save to save changes



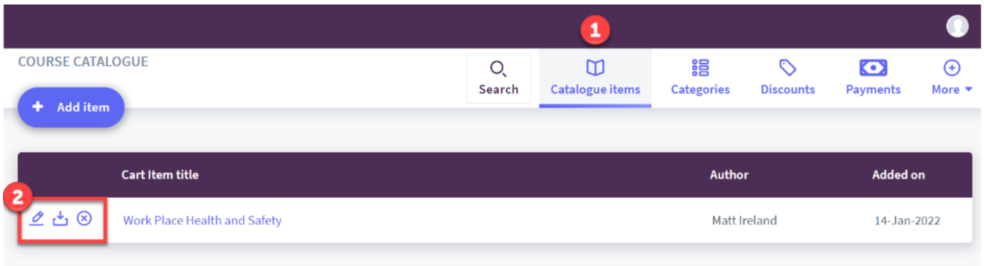
4.3.3 Assign Courses

1. Click Assign Courses
2. Select all courses to be assigned to this catalogue item
3. Click Save to save changes



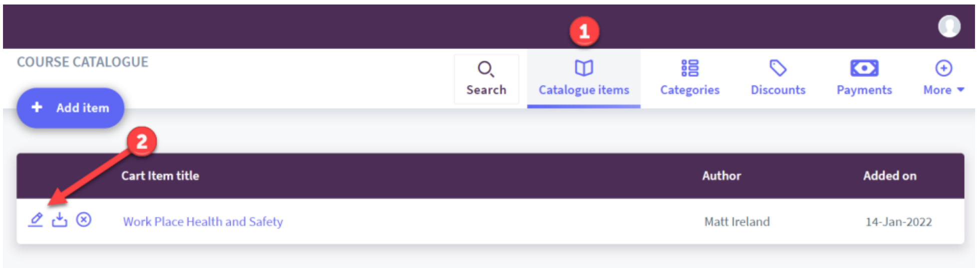
4.3.4 Course Catalogue action buttons

1. Click Catalogue items
2. Action buttons include:
    - Edit
    - Download registration
    - Delete

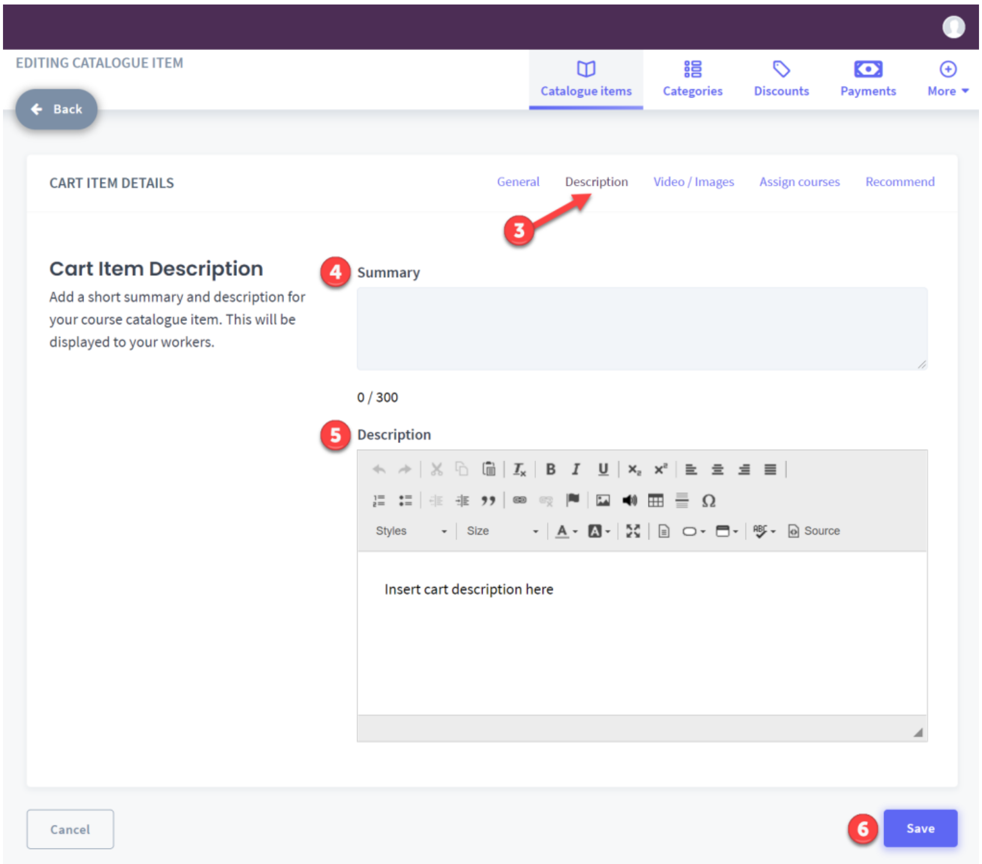


4.3.5 Catalogue Description

1. Click on the catalogue items tab
2. Click the edit button

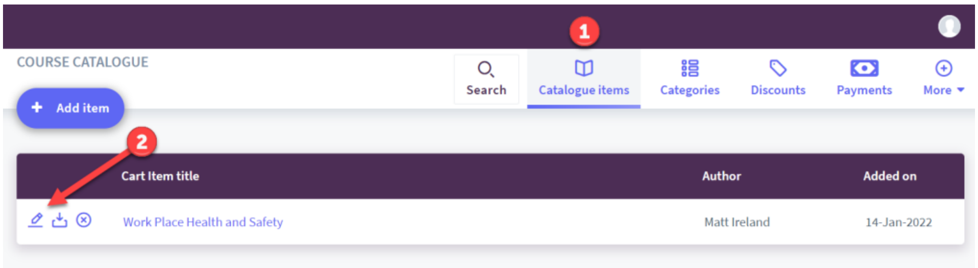


3. Click on the Description link
4. Add a summary
5. Add a description
6. Click Save to save changes

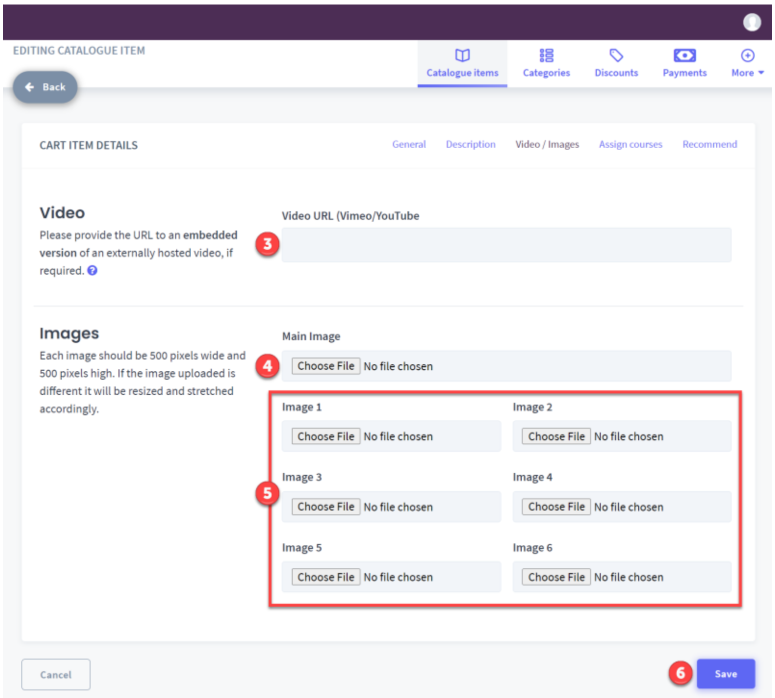


4.3.6 Adding Videos and Images

1. Click on the catalogue items tab
2. Click the edit button

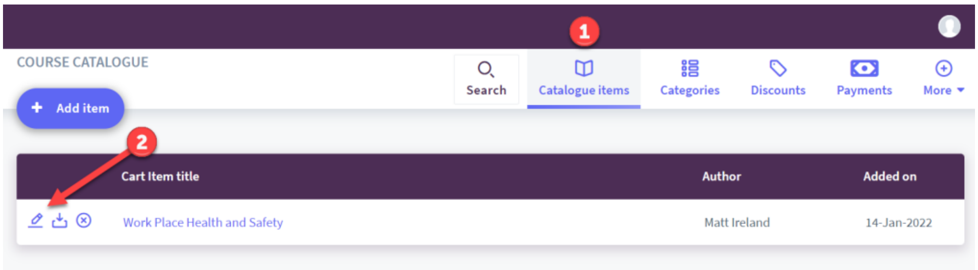


3. Option to enter the URL to an embedded video (YouTube, Vimeo etc). The learner will see the video when clicking the View Details button (of the course) in their portal.
4. Click choose file to upload the main image for the course. The learner will see this image when click Buy Courses in their portal.
5. Click choose file to upload up to 6 further images. The learner will see this image(s) when clicking the View Details button (of the course) in their portal.
6. Click Save to save changes

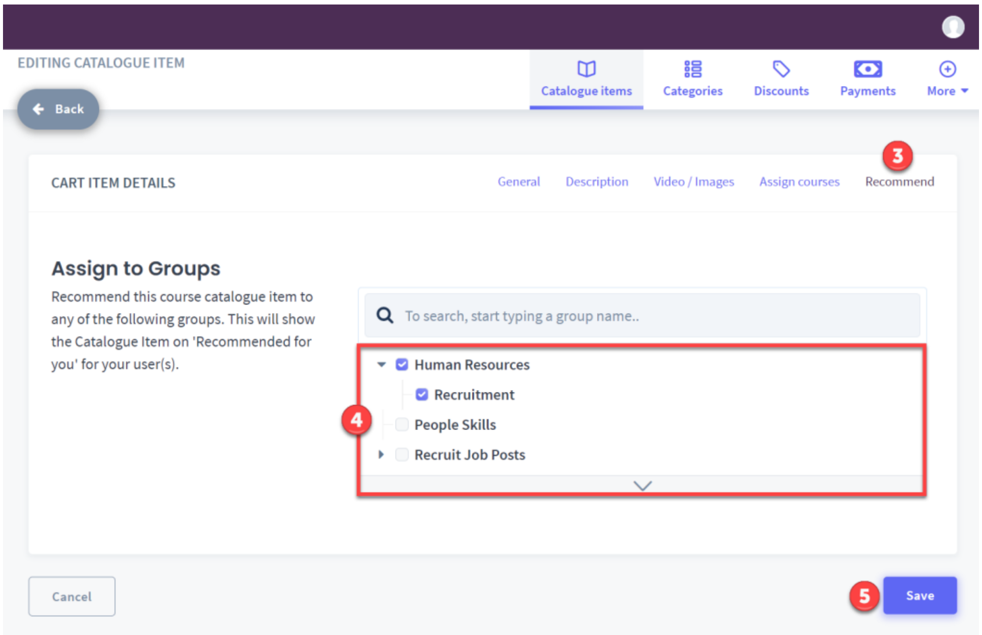


4.3.7 Recommend (Assign Course to a Group)

1. Click on the catalogue items tab
2. Click the edit button

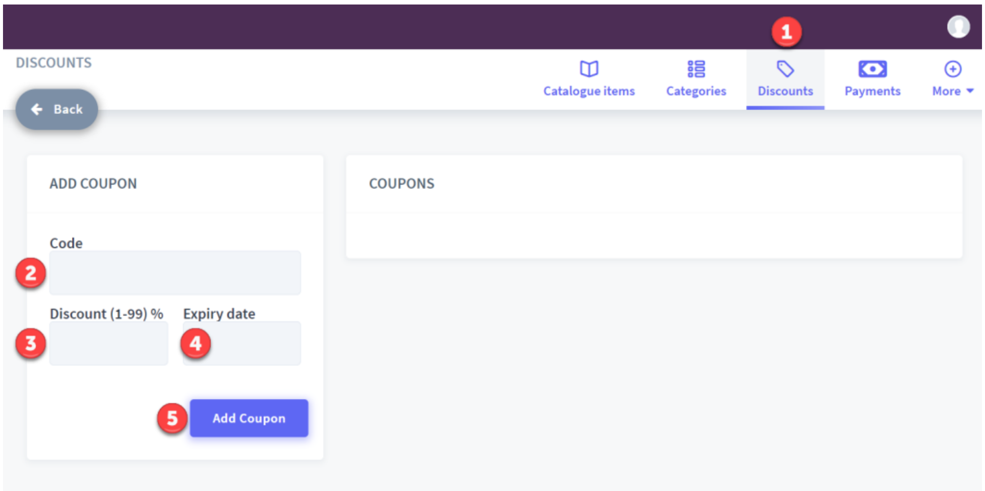


3. Click the Recommend link
4. Assign cart item to a group(s)
5. Click Save to save changes



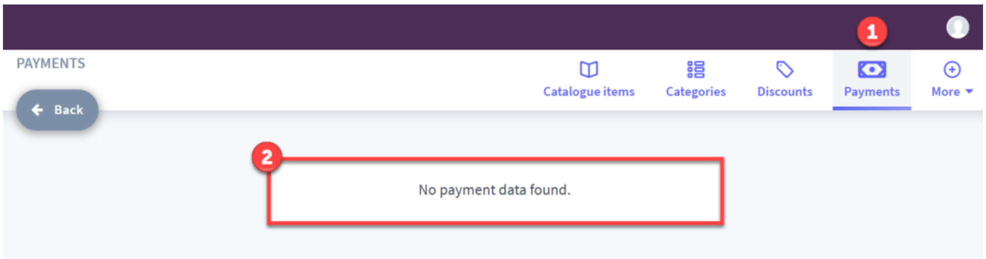
4.3.8 Adding a discount coupon

1. Click on the Discounts tab
2. Enter a code
3. Set the discount %
4. Enter an expiry date
5. Click add coupon



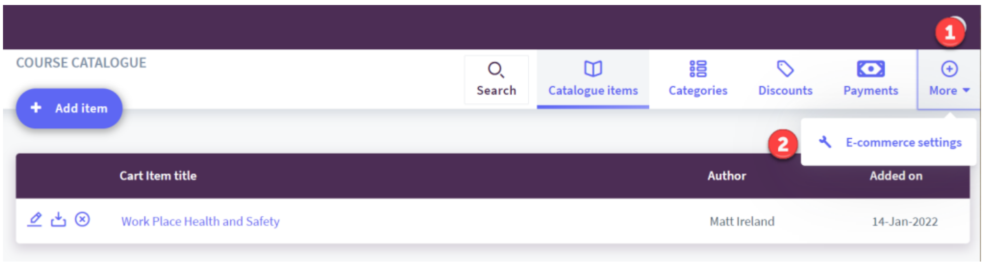
4.3.9 View Payment Data

1. Click on the Payments tab
2. When a course has been purchase it will show here

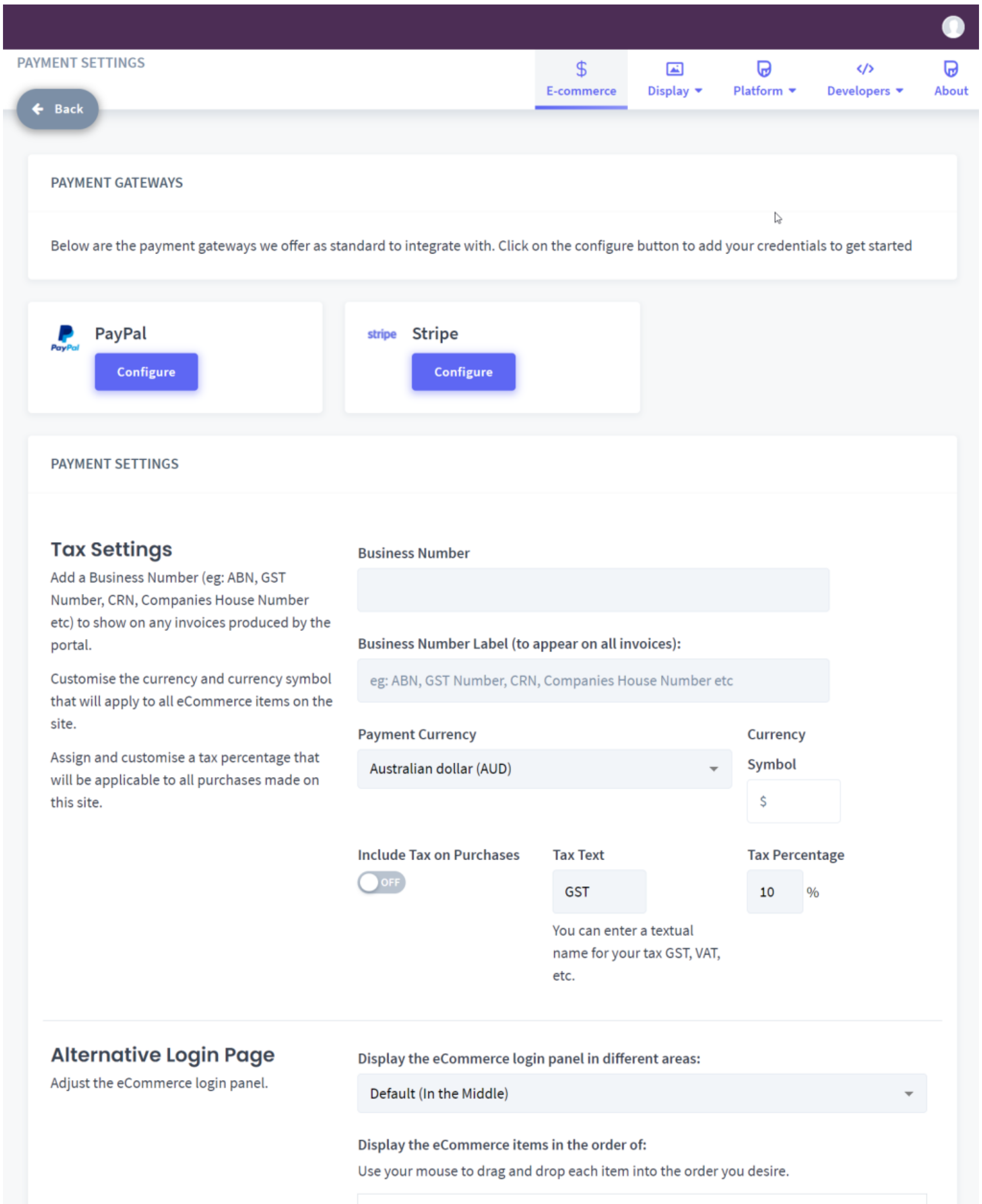


4.3.10 More - E-commerce Settings

1. Click on the More tab
2. Click E-commerce setting from drop down



3. You will be taken to the Payment Settings

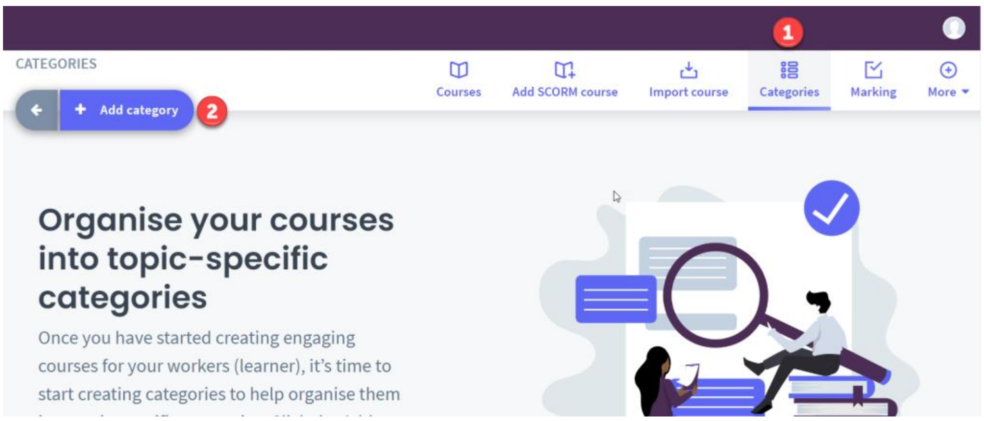


4.4 Content Publisher

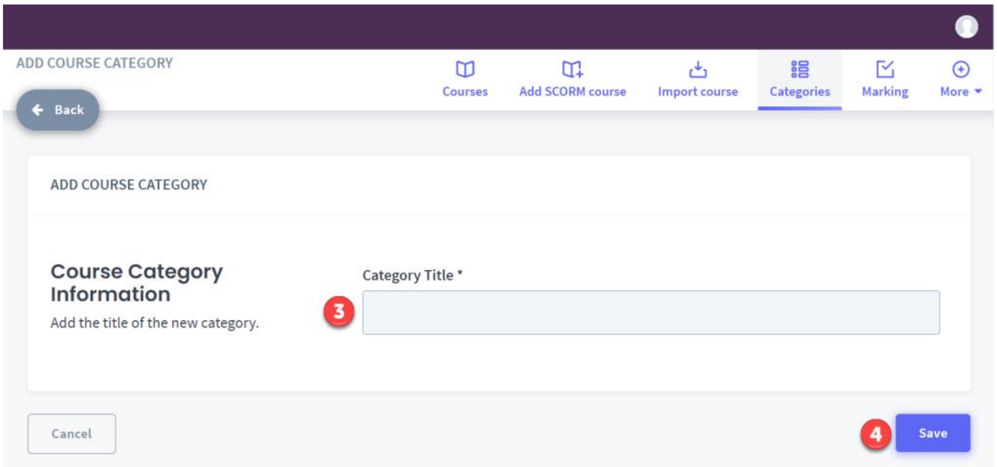
Enhance your workers (learner) skills by adding or importing courses to your online training platform.

4.4.1 Categories

1. Click on the Categories tab
2. Click Add category

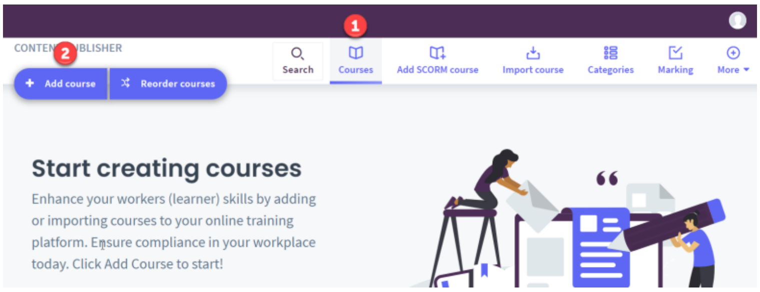


3. Add a category title
4. Click Save to Save changes

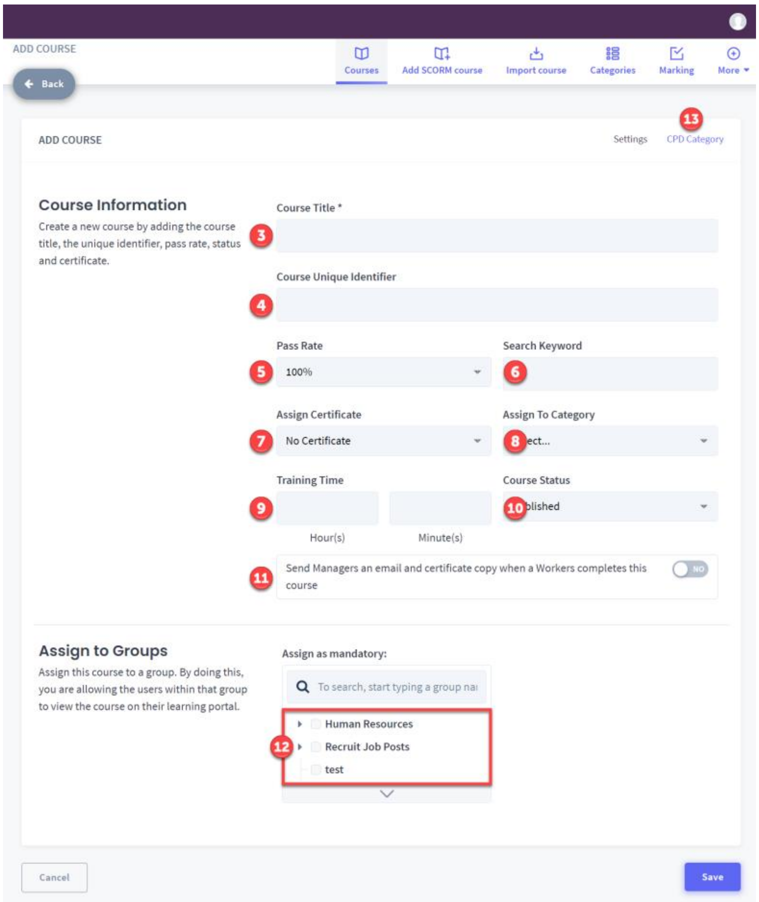


4.4.2 Adding a course

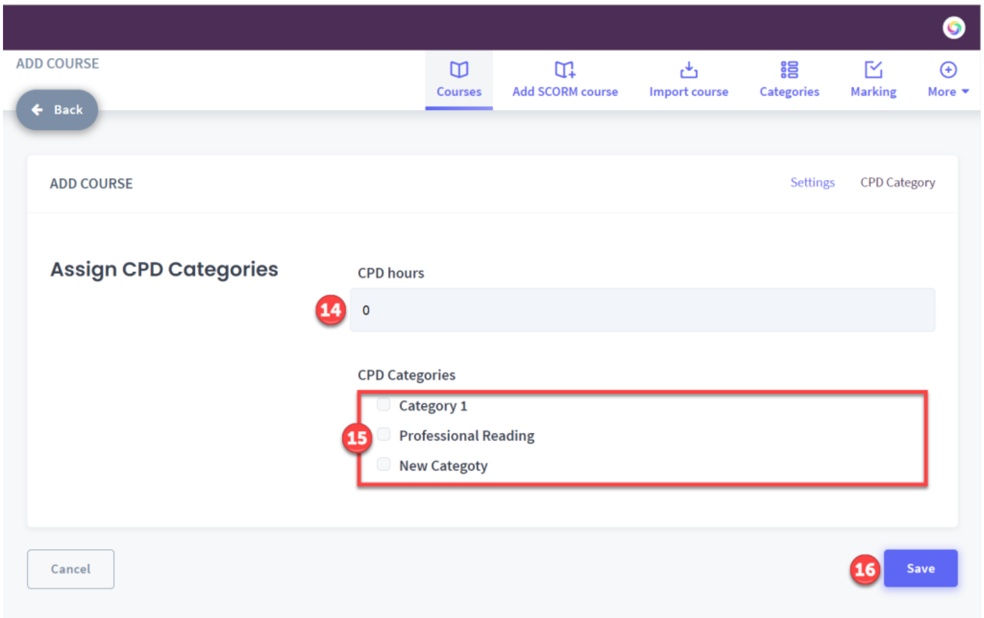
1. Click on the Courses tab
2. Click Add course



3. Add a course title
4. Add a course unique identifier if needed
5. Set the pass rate for the course
6. Add a search keyword to help learners find the course easily
7. Assign a certificate
8. Assign to a category
9. Enter the training time needed to take the course
10. Set Course Status. Published: Learner will be able to take the course. Draft: Learner won't be able to see the course in the portal
11. Toggle Yes to email send the manager a copy of the course certificate once the learner has completed the course
12. Select the group(s) that you want to assign the course to appear on the learner portal
13. When all Settings have been filled out, click CPD Category link

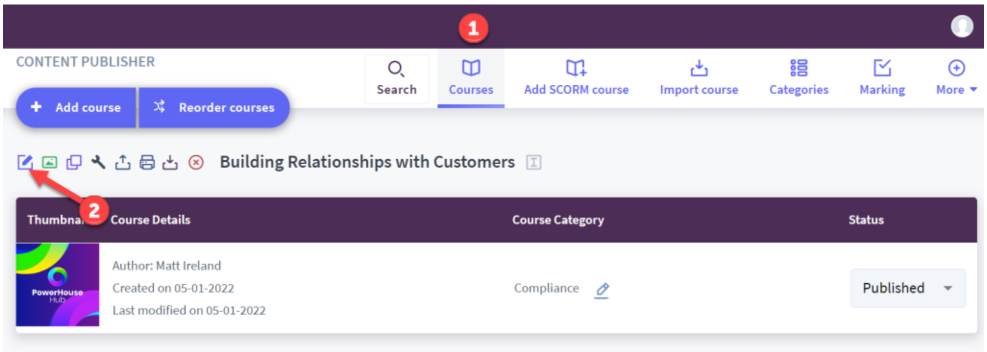


14. Enter the CPD hours
15. Select the CPD Category
16. Click Save to save changes

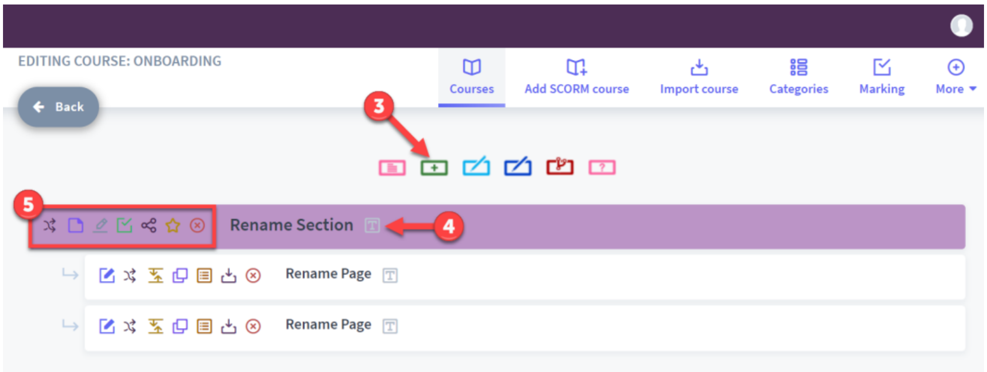


4.4.3 Building the course skeleton

1. Click on the Courses tab
2. Click edit course

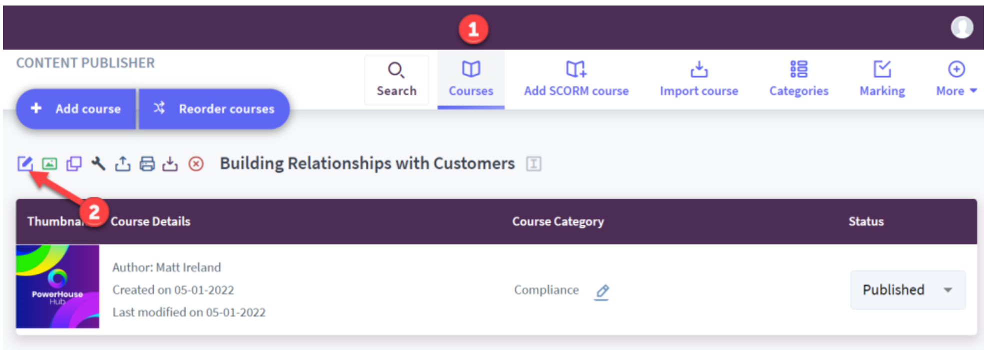


3. Click add section to add multiple sections
4. Click to edit the section name, enter the section name and then click the save icon
5. Use section icons to build the course section as required. Section icons include:
    - Re-arrange Items
    - Add Section Page
    - Add Section Practice Test - Practice tests are not graded and will not affect the learners overall grade
    - Add Section Test
    - Add Section Scenario
    - Add Section Survey
    - Delete Section



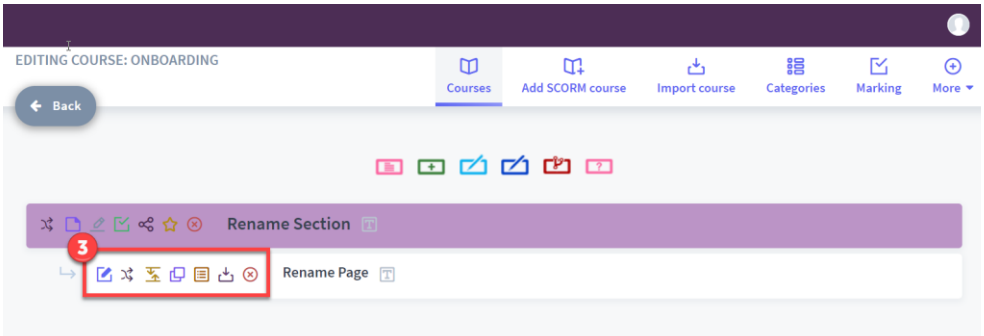
4.4.4 Course Actions Items

1. Click on the Courses tab
2. Click edit course



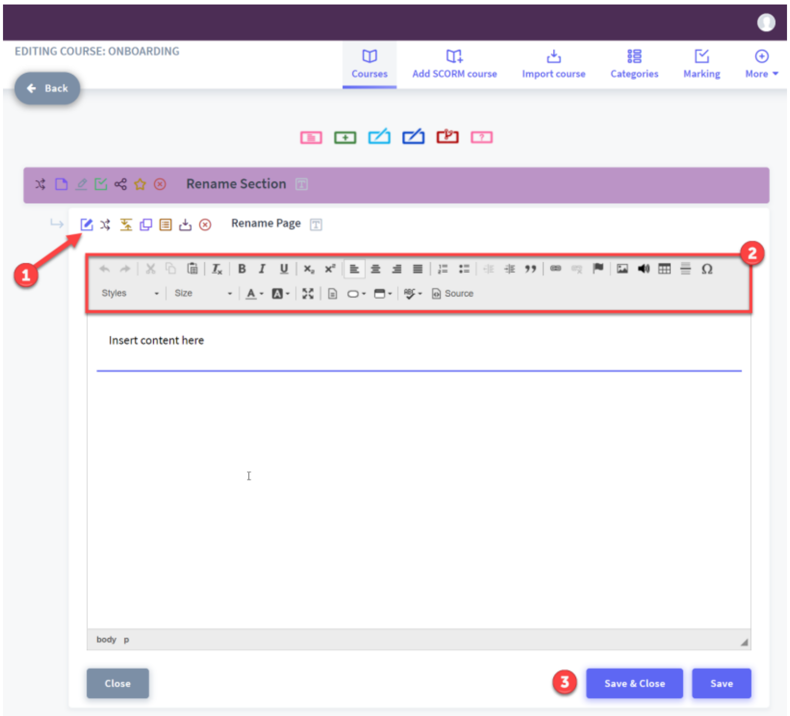
3. Use page icons to view your course. Page icons include:
    - Edit this page –insert templates and creative assets through the CK editor
    - Re-arrange items – re-order pages in the section
    - Move this page – move the page into another section

- Duplicate this page – copy the page
- Preview this page – view the course from the back end
- Import SCORM to this page – you must have SCORM files to use this option
- Delete this page



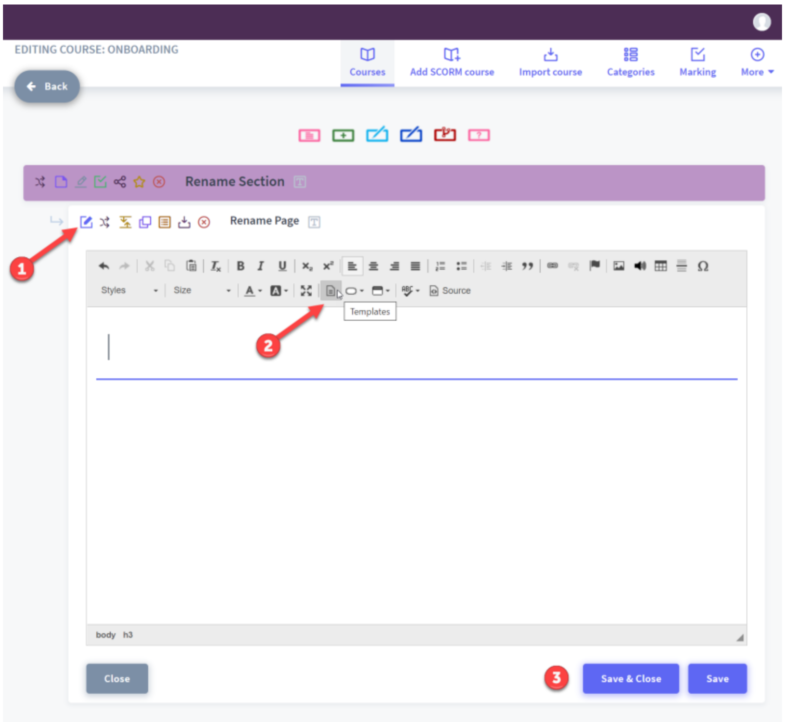
4.4.5 Creating Course Pages Using the CK Editor

1. Click the edit this page icon
2. Create pages similar a word doc using CK editor options
3. Click Save to save changes or Save and Close when finished



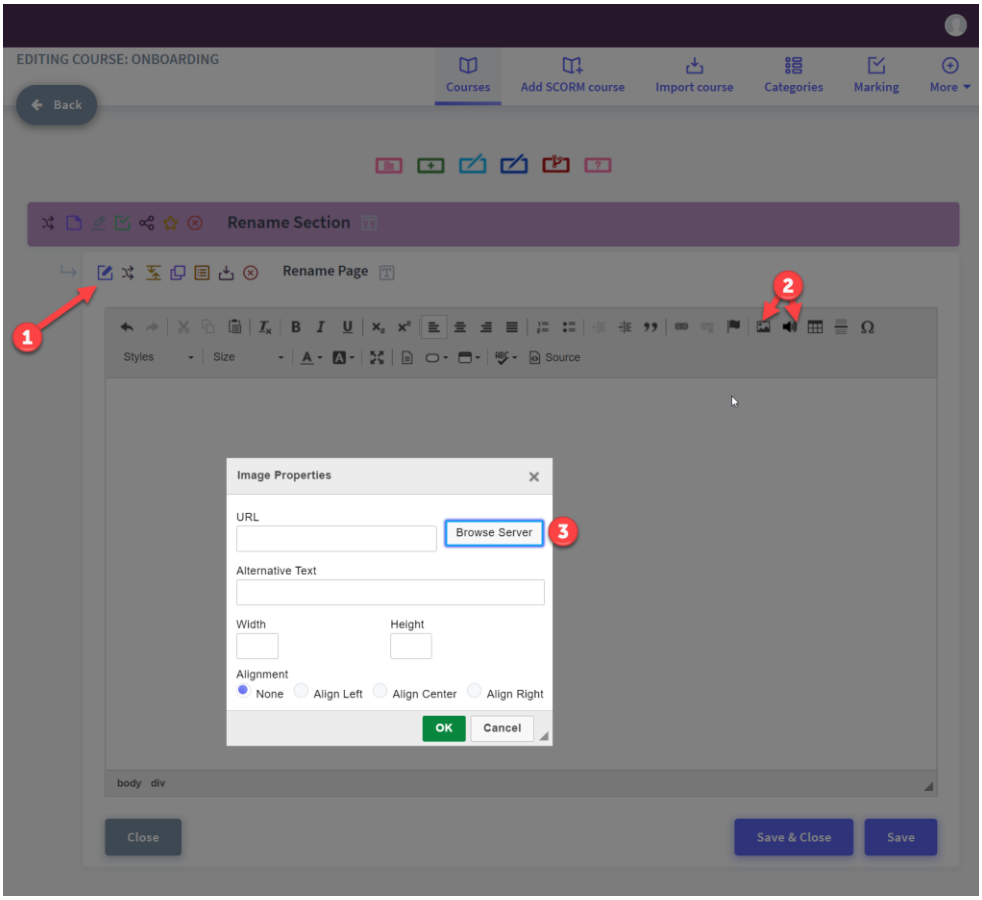
4.4.6 Creating Course Pages from a Template

1. Click the edit this page icon
2. Click the Templates icon, select desired template and add page content
3. Click Save to save changes or Save and Close when finished

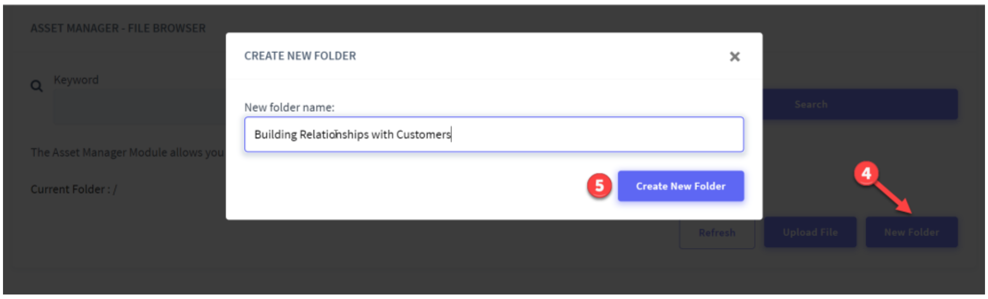


4.4.7 Uploading images and audio files

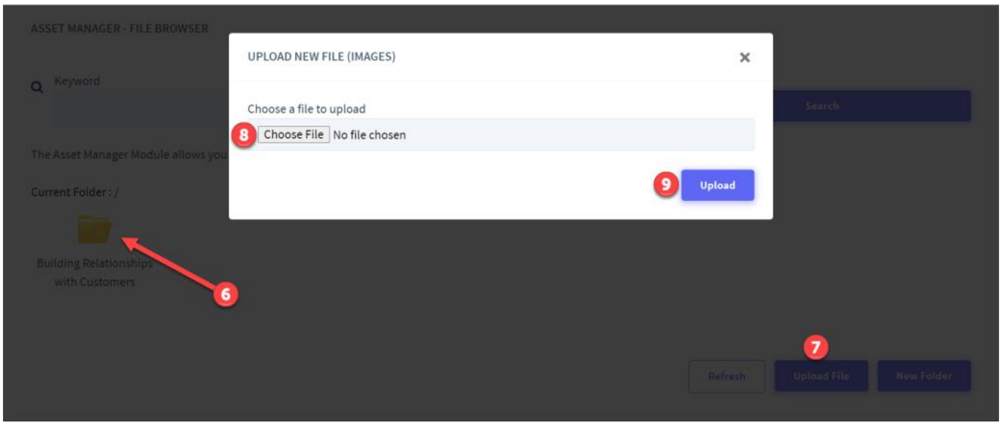
1. Click the edit this page icon
2. Click the image or audio button (depending on, which option you need)
3. Click Browse Server



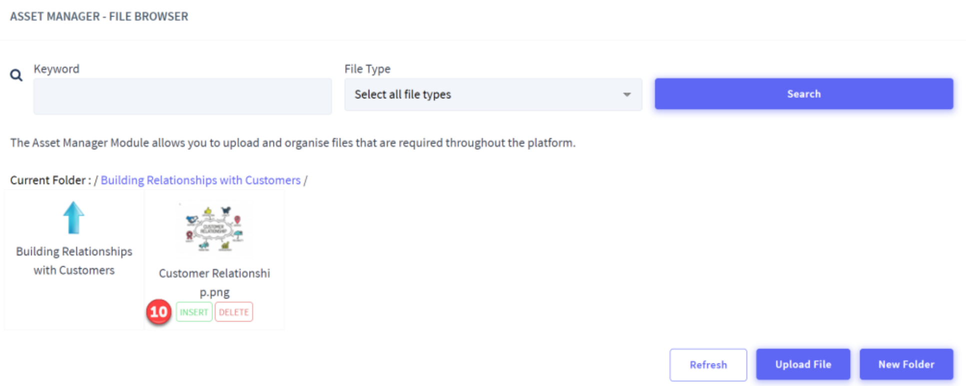
4. Click New Folder - it's best practice for each Course should have its on media folder.
5. Name the folder and click Create New Folder



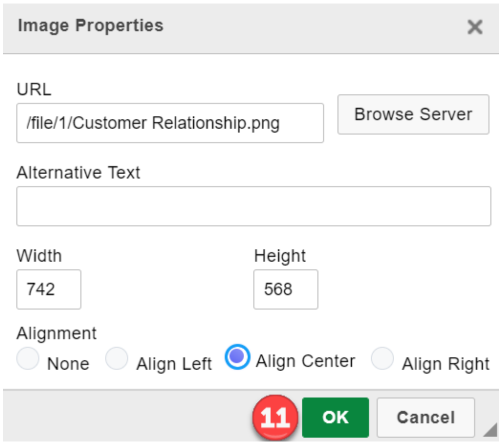
6. Click the new folder
7. Click Upload File
8. Click Choose File and select relevant file from your hard drive
9. Click Upload



10. Hover over file and click Insert

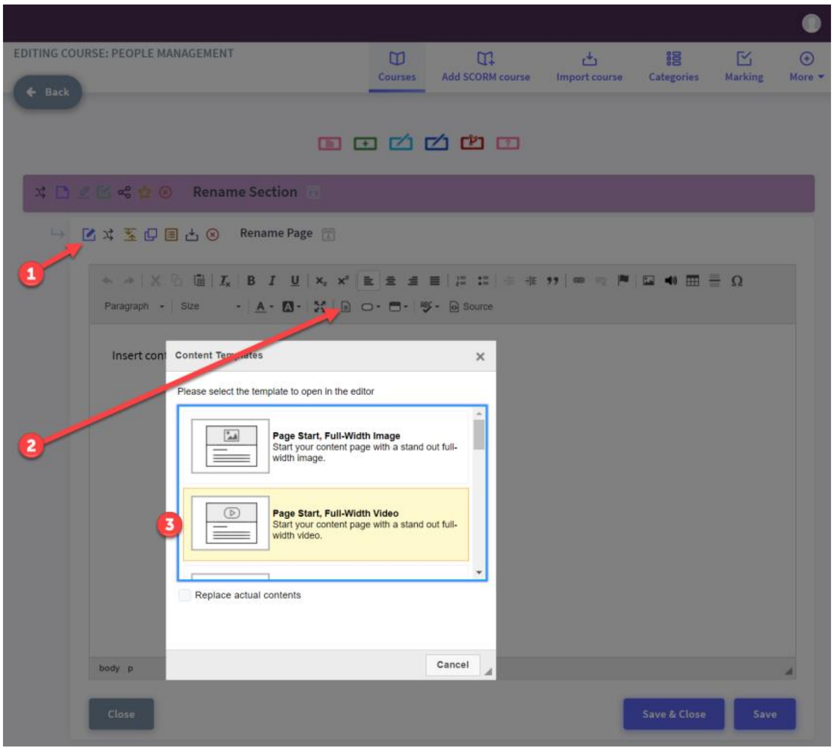


11. Select centre align and click OK

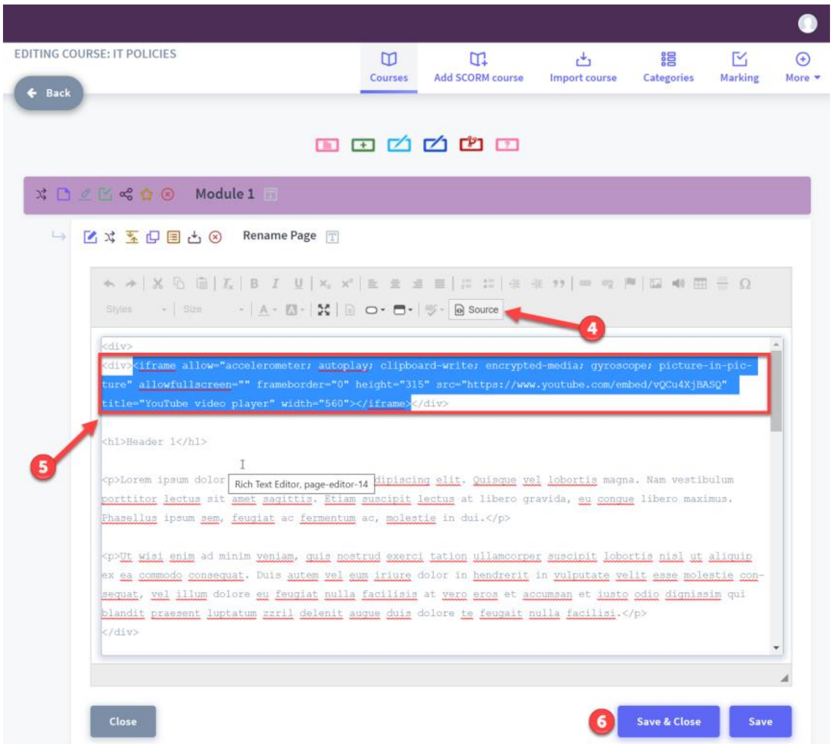


4.4.8 Adding a video

1. Click the edit this page icon
2. Click the Templates icon
3. Click page start, full-width video



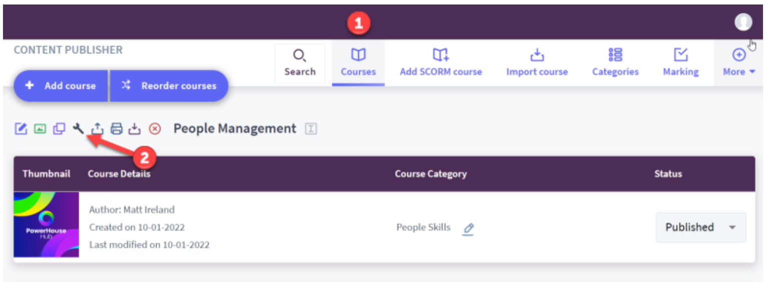
4. Click Source
5. Replace code between <div> and </div> tags with the embed code for the video that you would like to use (as highlighted in image)
6. Click Save & Close



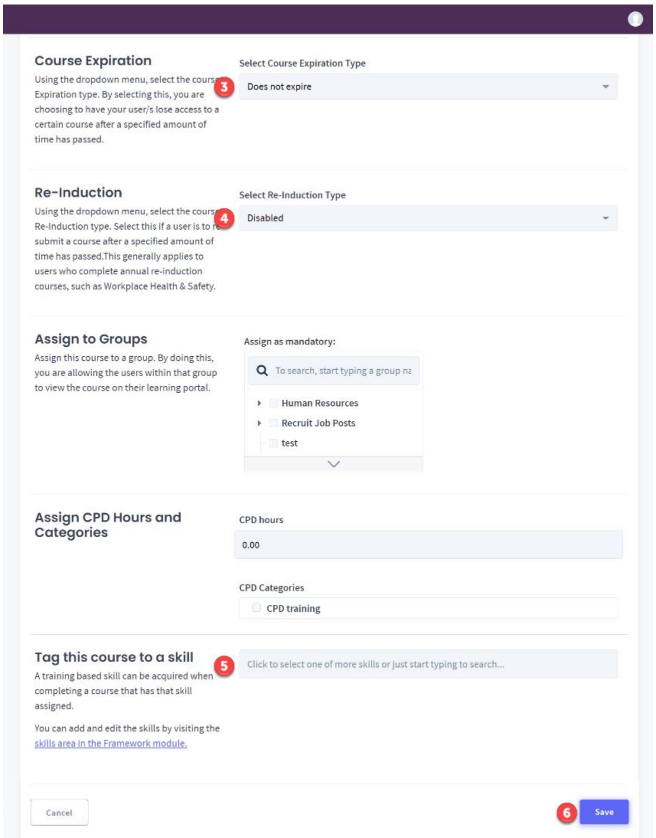
4.4.9 Course Settings

After you've added a course, a few additional options can be configured in the course settings.

1. Click the courses tab
2. Click course settings icon

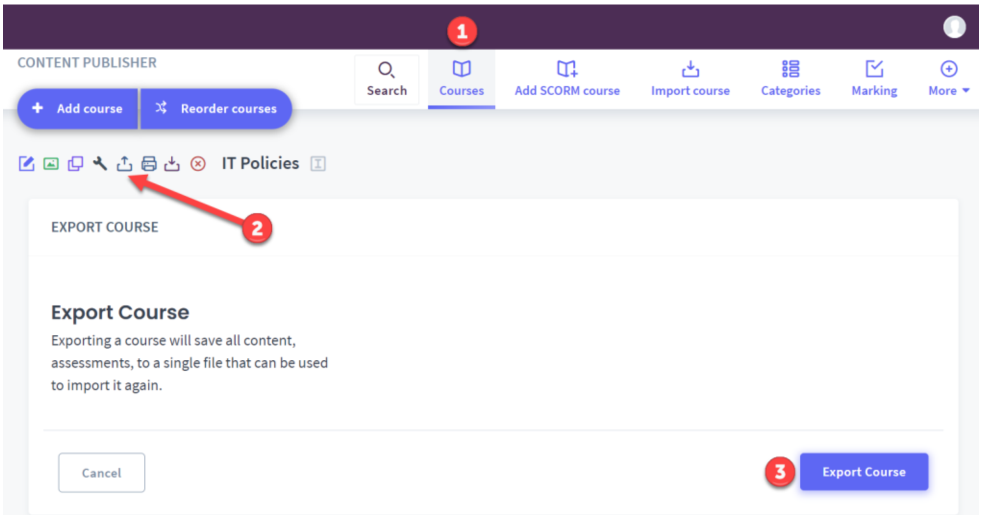


3. Using the dropdown menu, select the course Expiration type. By selecting this, your users will lose access to the course after a specified amount of time has passed.
4. Using the dropdown menu, select the course Re-Induction type. Select this if a user needs to re-submit a course after a specified amount of time has passed. This generally applies to users who complete annual re-induction courses, such as Workplace Health & Safety.
5. A training based skill can be acquired when completing a course that has a skill assigned.
6. Click Save to save changes



4.4.10 Export Course

1. Click the Courses tab
2. Click the export button
3. Click export course and a zip file will download to your hard drive

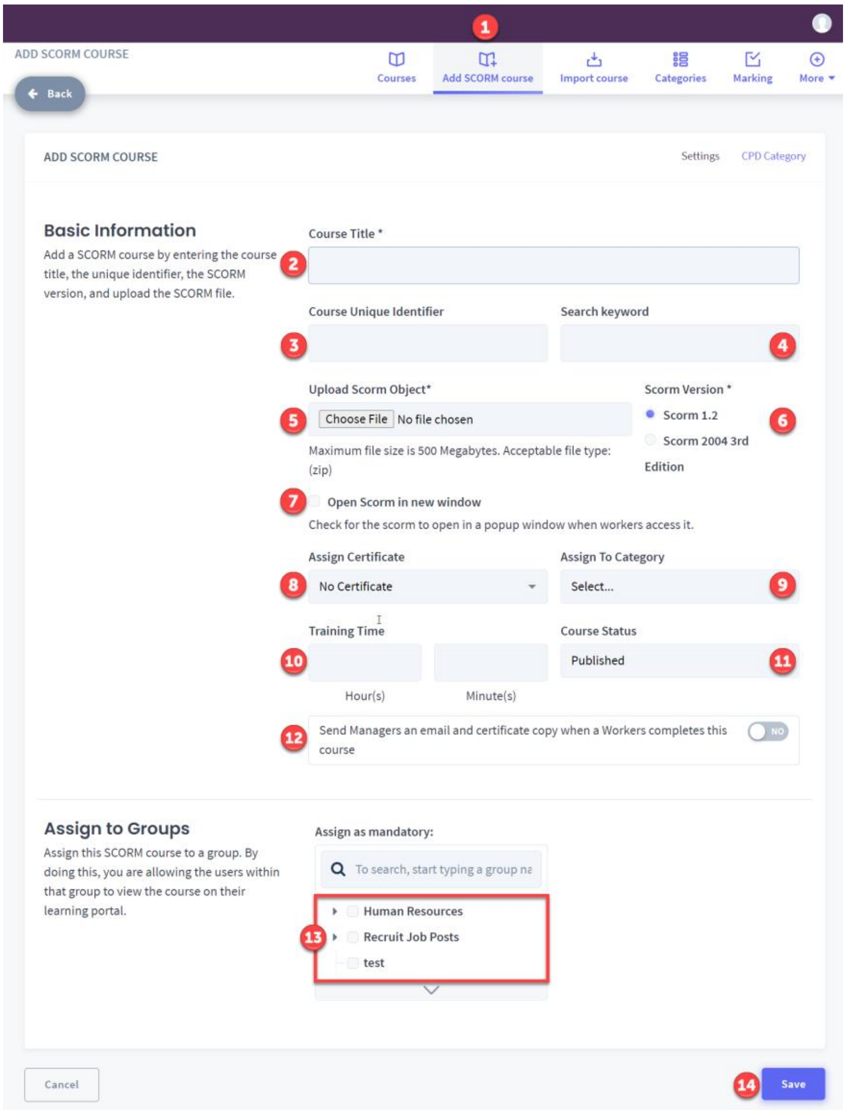


4.4.10 Add SCORM Course

Our platform allows the import of SCORM with pass or fail reporting capabilities. There are two options for exporting SCORM. These files can either be added to the page, which allows for the addition of other course pages, or as a separate course entirely, which will have the course sitting by itself. Should you wish to have more detailed reports, it is recommended to use our platform to build your assessments.

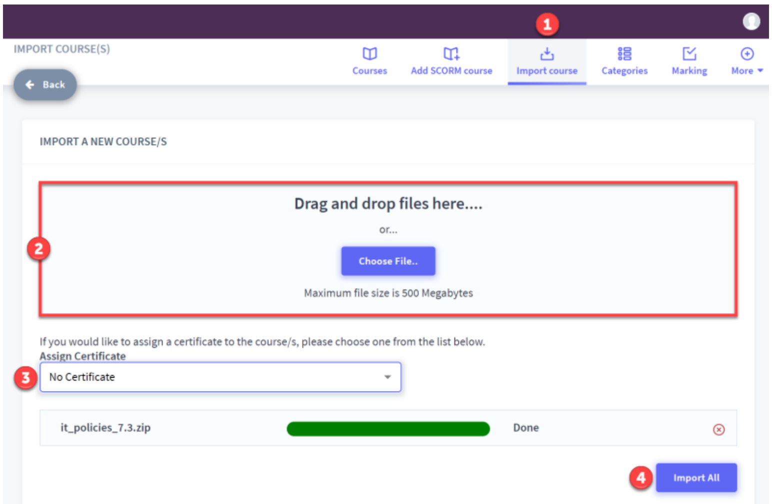
To populate a SCORM course 'by itself' with no other course pages required, steps are as follows:

1. Click Add SORM course tab
2. Add a course title
3. Add a course unique identifier if needed
4. Add a search keyword to help learners find the course
5. Click Choose File to upload a SCORM file
6. Select the SCORM version
7. Select tick box for SCORM to open in a pop up window when workers access it
8. Assign a certificate
9. Assign to a category
10. Enter the training time needed to take the course
11. Set Course Status. Published: Learner will be able to take the course. Draft: Learners wont be able to see the course in the portal
12. Toggle Yes to email send the manager a copy of the course certificate once the learner has completed the course
13. Select the group(s) that you want to assign the course to appear on the learner portal
14. Click Save to save changes



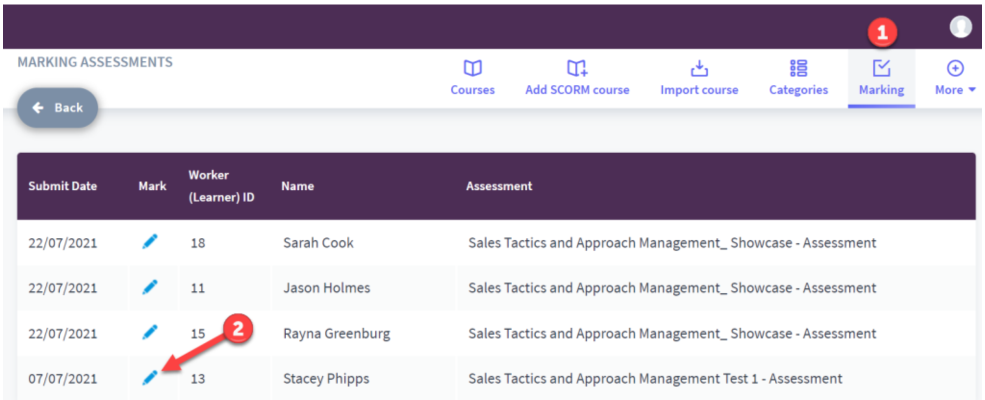
4.4.11 Import Course

1. Click Import course
2. Click choose file to upload the course zip file from your hard drive or drag and drop the course zip file into the box
3. Assign a course certificate from drop down box
4. Click import all

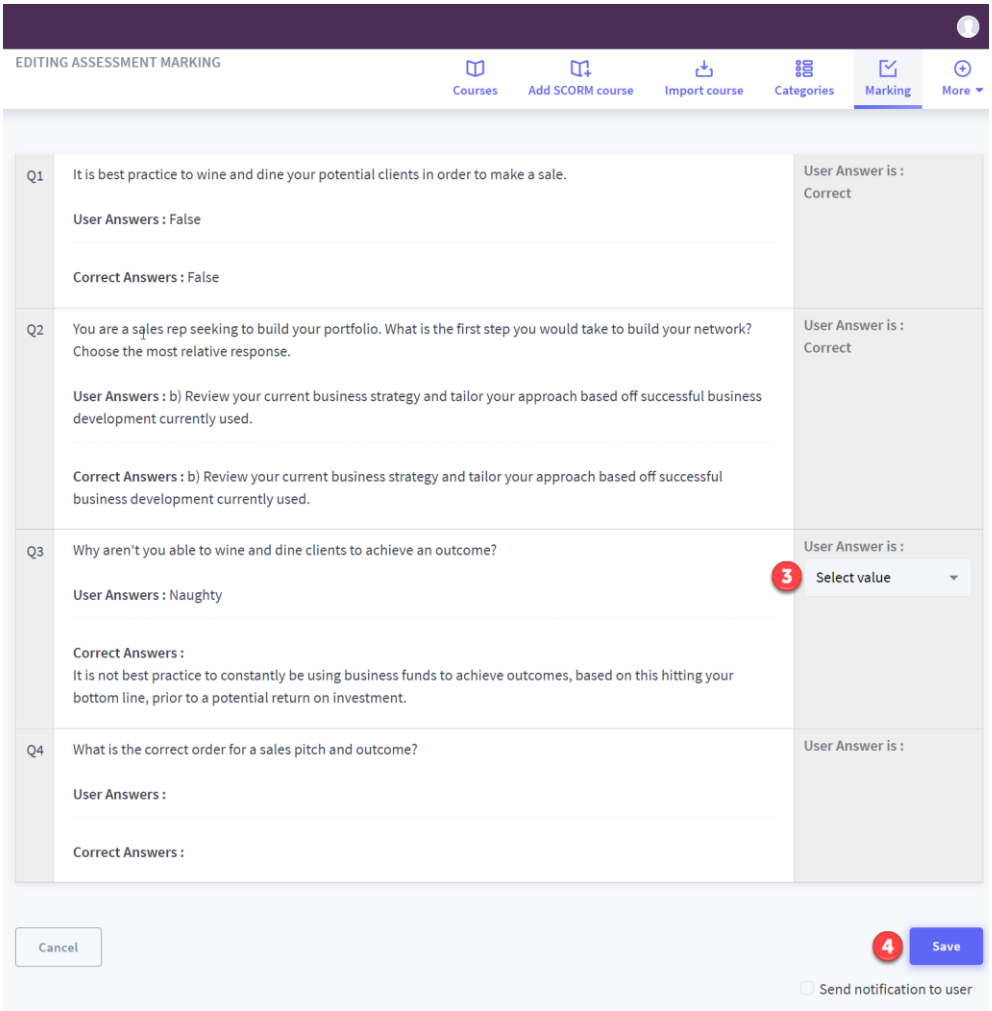


4.4.12 Marking

1. Click the Marking tab
2. Click the edit icon for the course you would like to mark

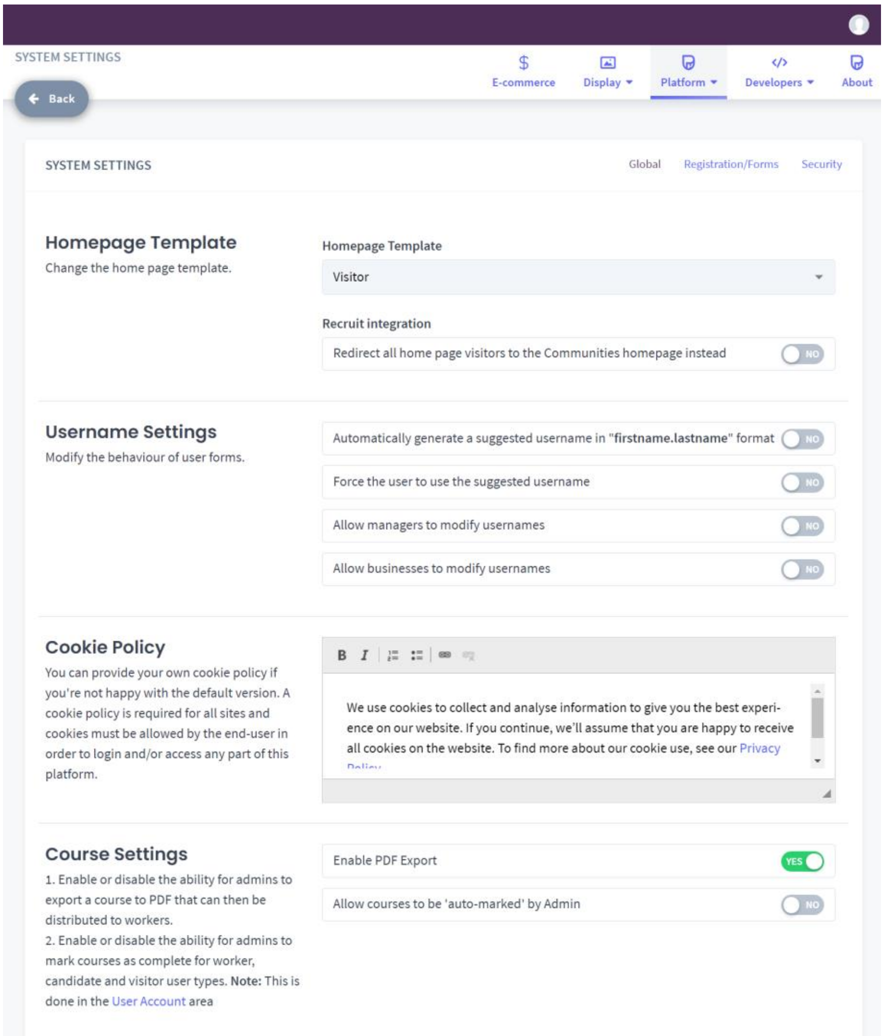


3. Select if the answer is correct or incorrect
4. Click Save to notify the user



4.4.13 More – Global Settings

1. Click on the More tab
2. Click E-commerce setting from drop down
3. You will be taken to the System Setting

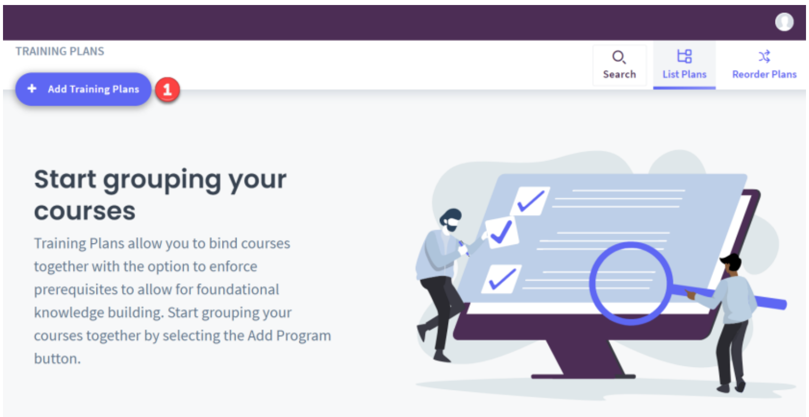


4.5 Training Plan Manager

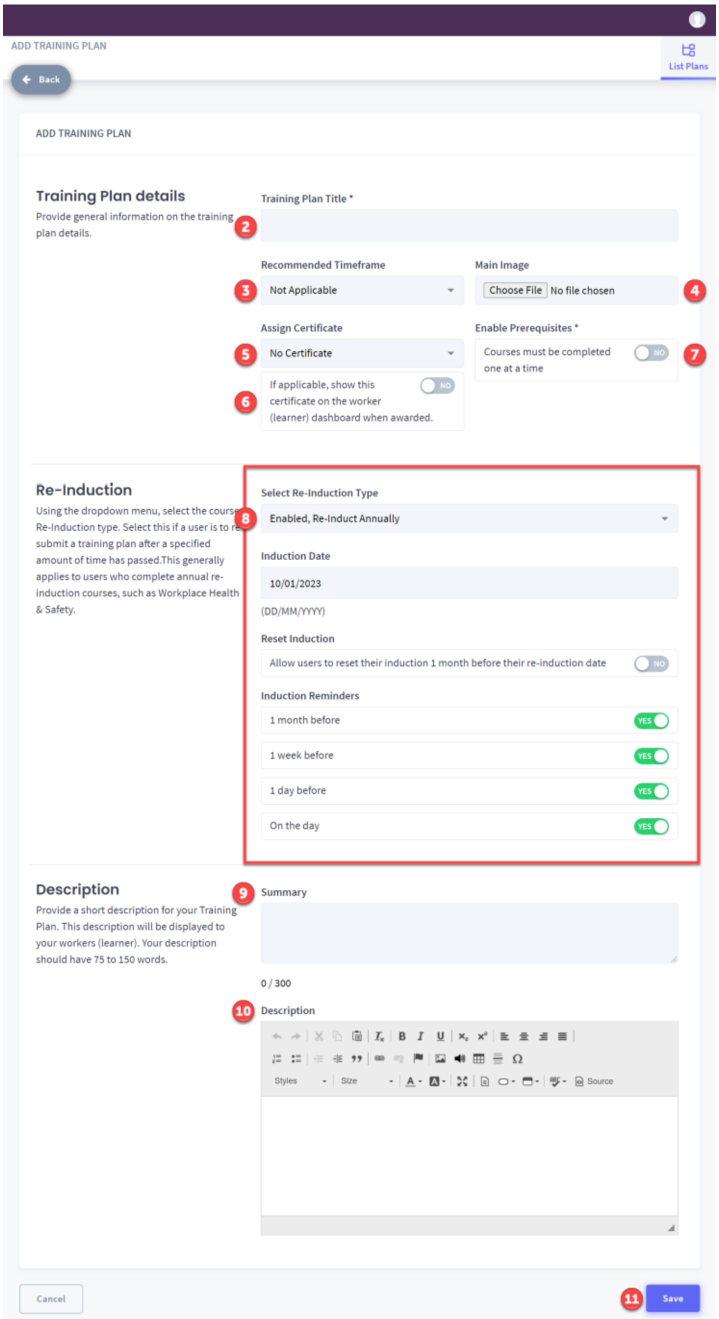
Training Plans Manager allows you to bind courses together with the option to enforce prerequisites to allow for foundational knowledge building.

4.5.1 Adding a training plan

1. Click Add Training Plans

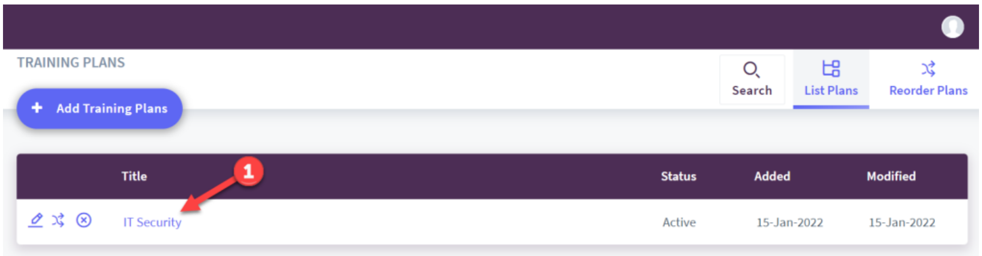


2. Add a title for the training plan
3. Select a recommended timeframe that you would like the learner to complete the training plan in
4. Click choose file to upload an image from your hard drive
5. Assign a certificate
6. Toggle Yes to show the certificate on the learner dashboard once awarded
7. Toggle Yes to ensure courses must be completed one at a time
8. Select a re-induction option if you would like the learner to re-submit a training plan after a specified amount of time has passed. This generally applies to users who complete annual re-induction courses, such as Workplace Health & Safety.
9. Add a summary
10. Add a description that will be displayed to the learner
11. Click Save to save changes

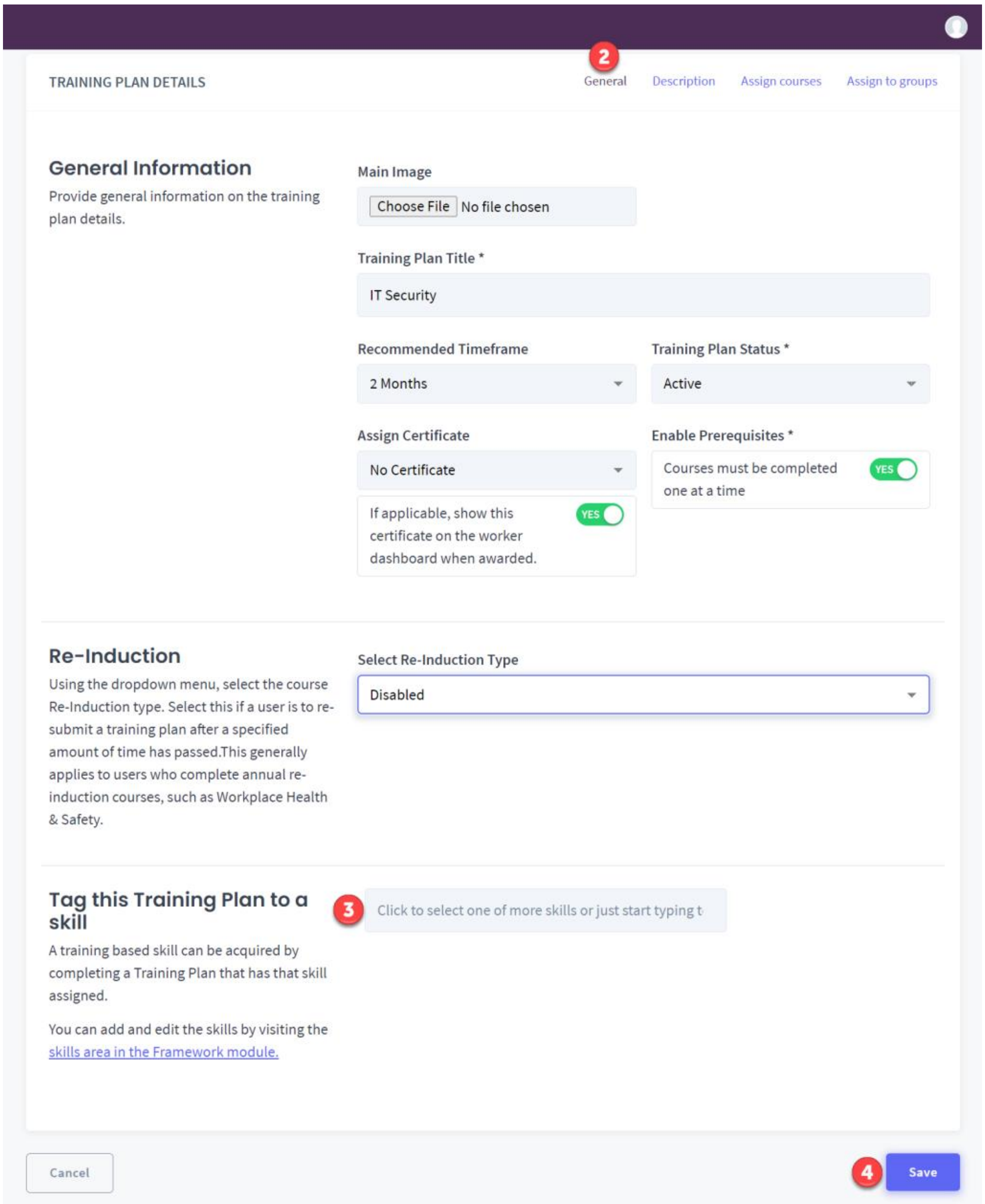


4.5.2 Tagging a skill to a training plan

1. Click the training plan title

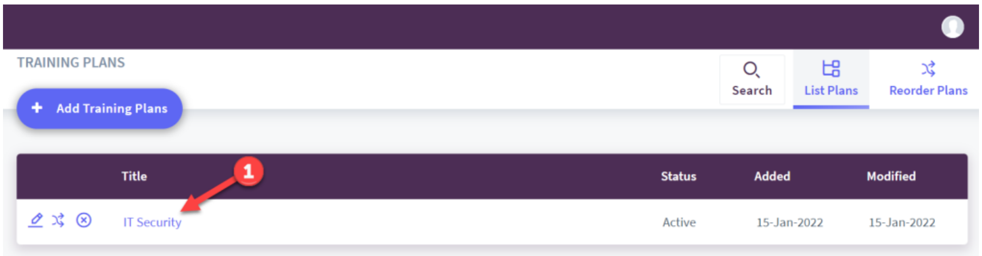


2. Click the general link
3. Type in the skill(s) the learner will achieve after completing the training plan
4. Click Save to save changes

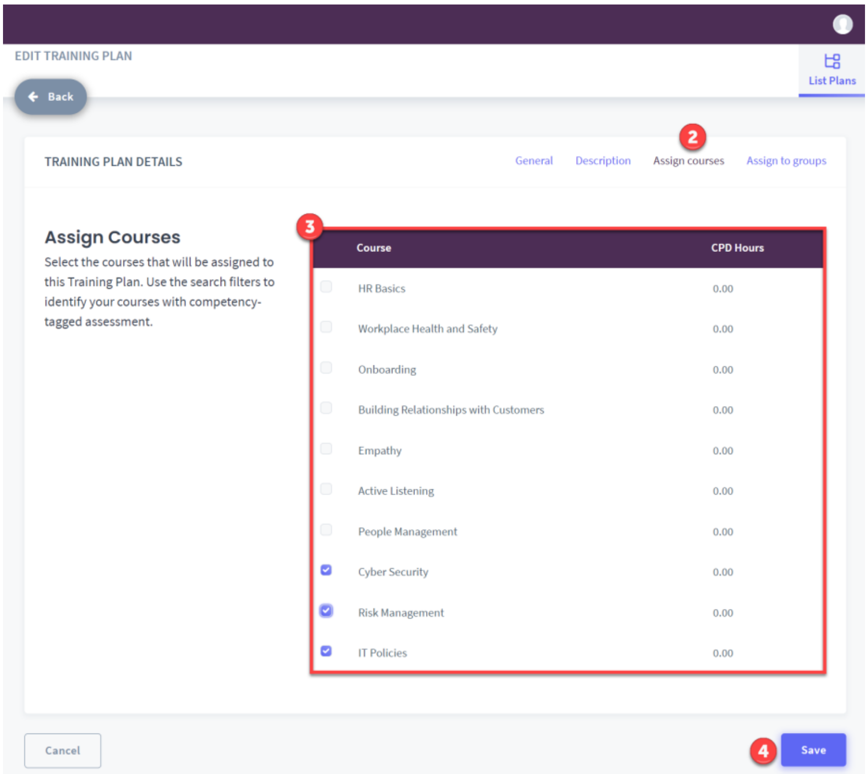


4.5.2 Assign Courses

1. Click the training plan title

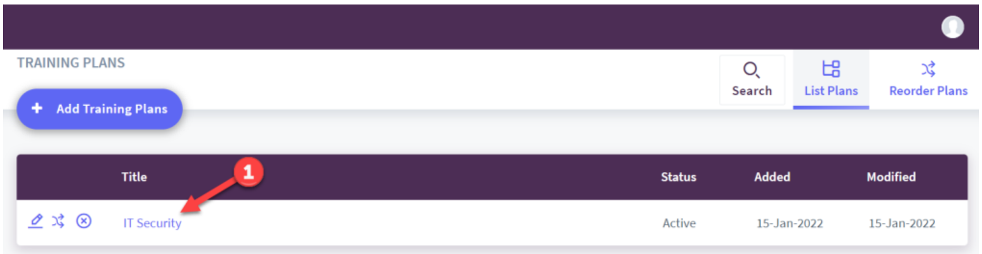


2. Click the Assign courses link
3. Select the course(s) that will be assigned to the training plan
4. Click Save to save changes

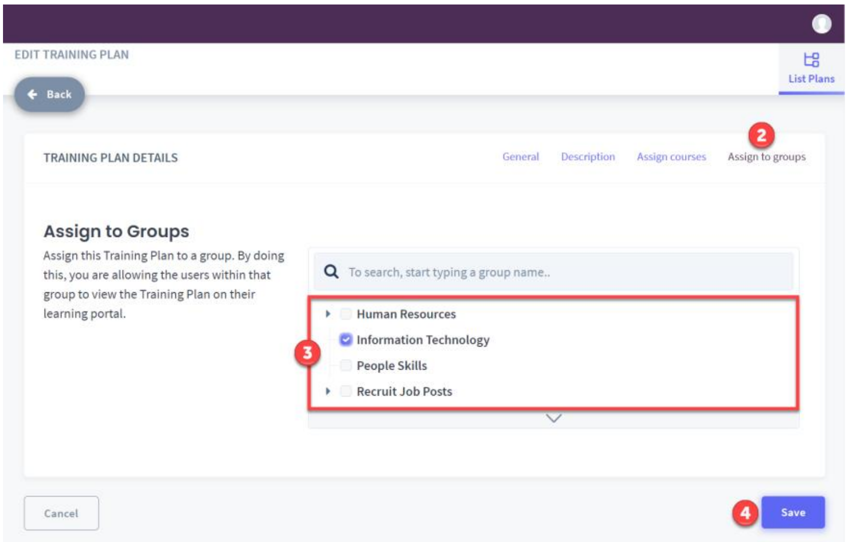


4.5.3 Assign Training Plan to Groups

1. Click the training plan title



2. Click Assign to Groups link
3. Select to group(s) you want to assign the training plan to
4. Click Save to save changes



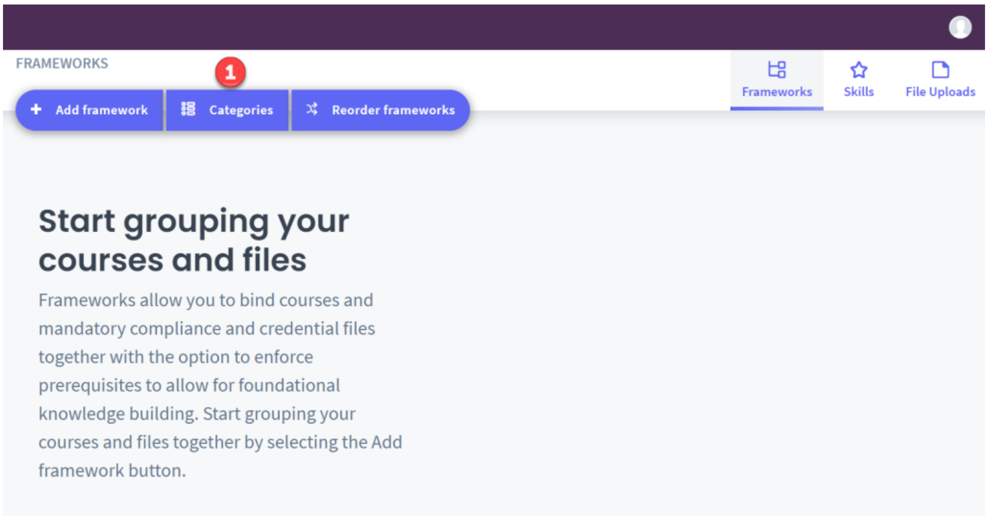
4.6 Framework Manager

Frameworks allow you to bind courses and mandatory compliance and credential files together with the option to enforce prerequisites to allow for foundational knowledge.

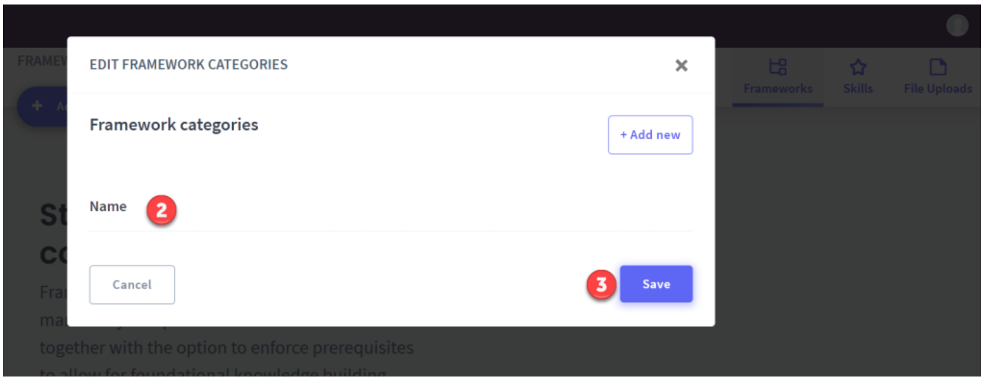
Before building a framework you will need to make sure you have already created the required training courses and the required file uploads (skill evidence, compliance, credentials and vaccination).

4.6.1 Adding a category

1. Click the categories button

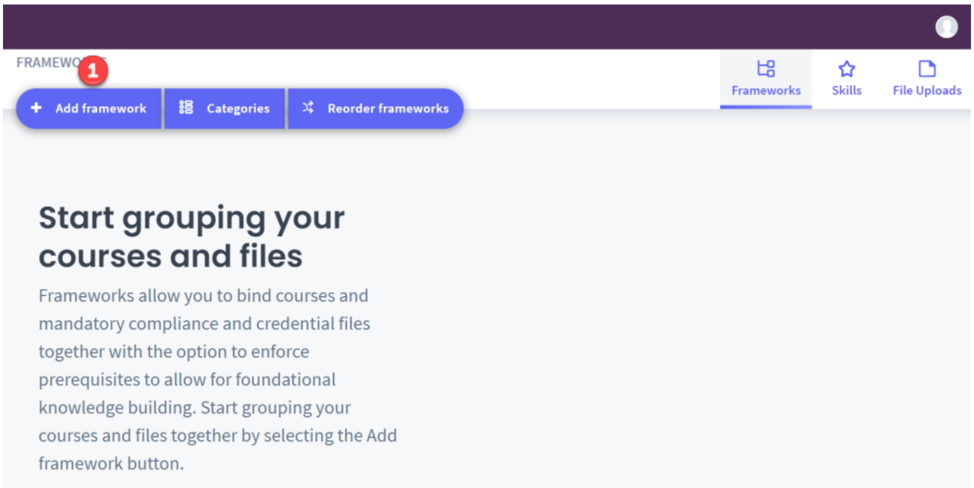


2. Enter the category name
3. Click Save to save changes

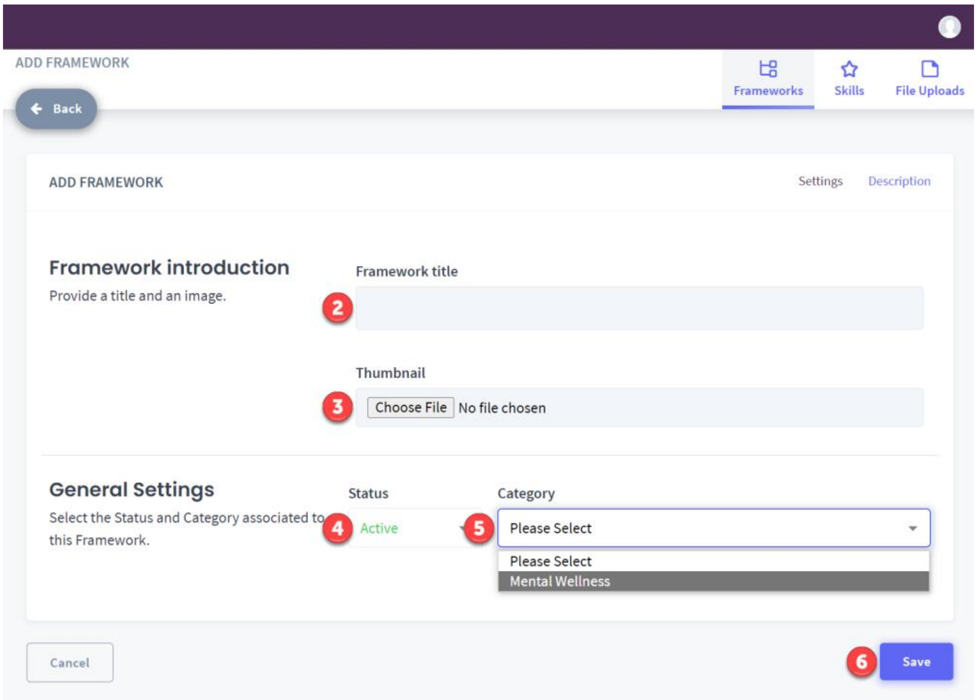


4.6.2 Adding a framework

1. Click Add framework



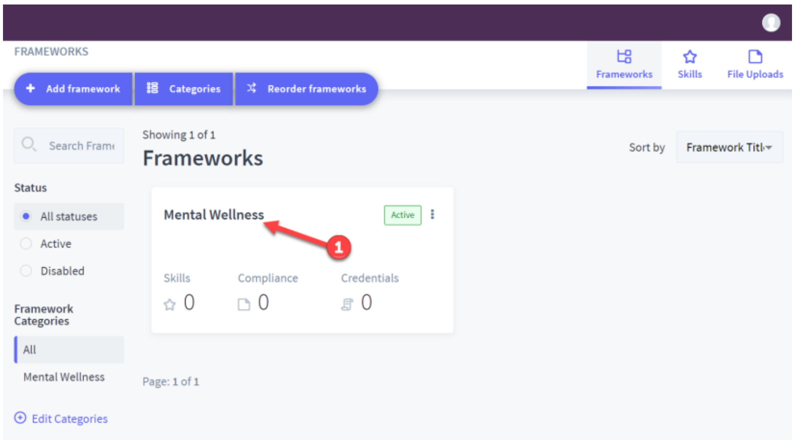
2. Add the framework title
3. To upload a thumbnail for the framework, click choose file and upload an image from your hard drive
4. Set the status. Active means the framework is live and ready for learners to complete. Disabled means the leaner and won't be able to see on their portal
5. Select the category that you just created in the last step from the drop down list
6. Click Save to save the changes



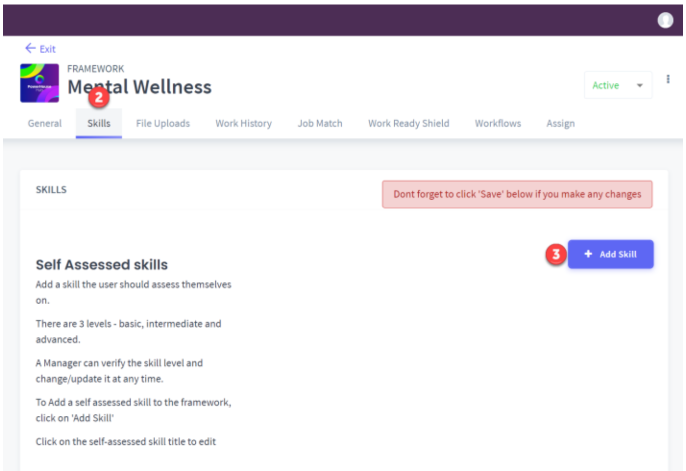
4.6.3 Skills

Please note that training based skills (courses) and skills evidence (file uploads) need to be created before you can complete the skills section.

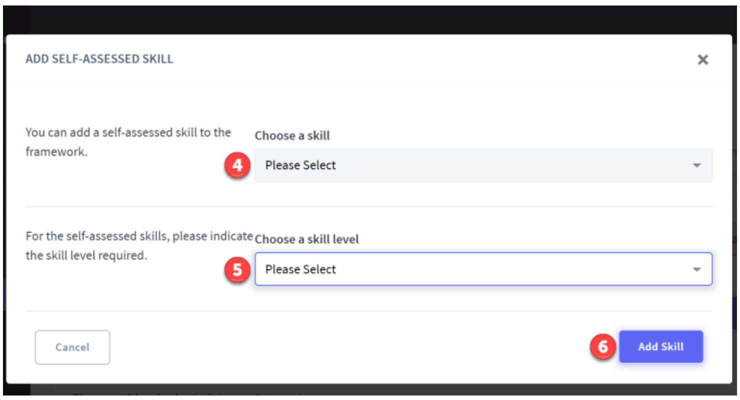
1. Click on the Framework title



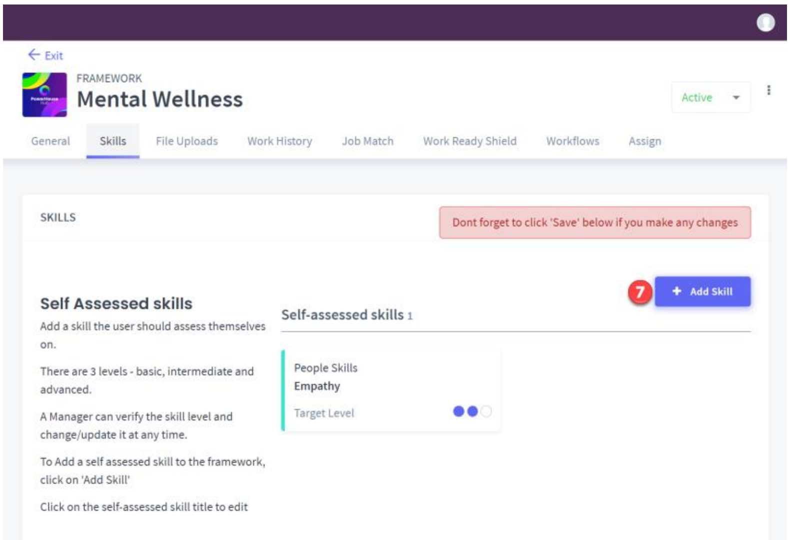
2. Click on the Skills tab
3. Click Add skill to add a self assessed skill. This is where the user can assess themselves against a desired skill (basic, intermediate and advanced). A Manager can verify the skill level and change/update it at any time.



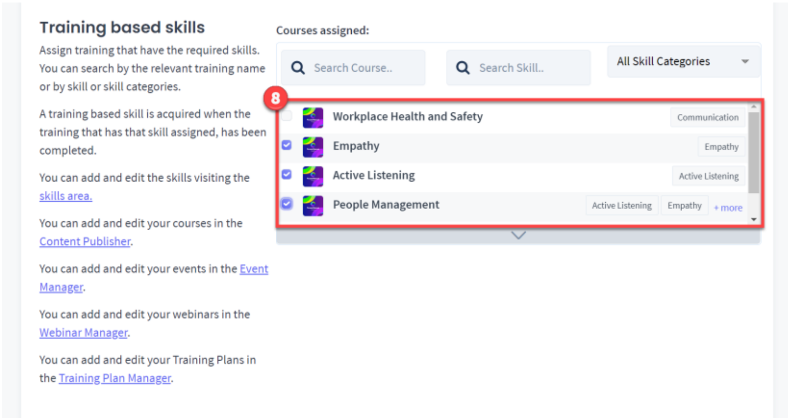
4. Choose a skill that the learner can self assess against
5. Set the skill level that you require for this position
6. Click add skill



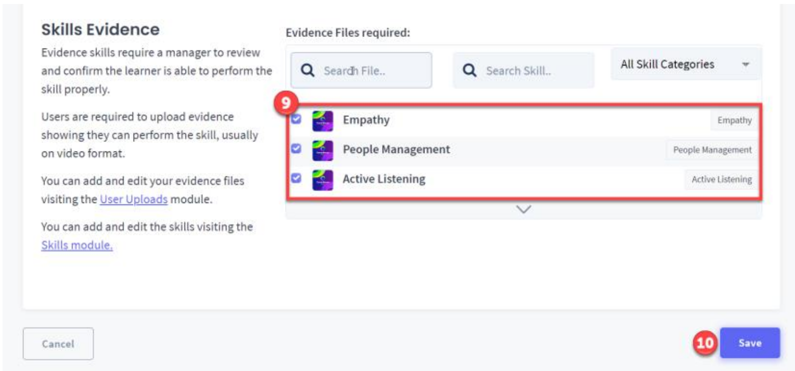
7. To add further skills, click add skill again



8. Select the training-based skills (courses) that the learner can complete and give them the skills that they need for the role.



9. Select the skills evidence files (File Uploads) that will enable the learner to upload their evidence showing that that they can perform the skill properly. Their manager can then review and confirm the learner has the required skill.
10. Click Save to save changes

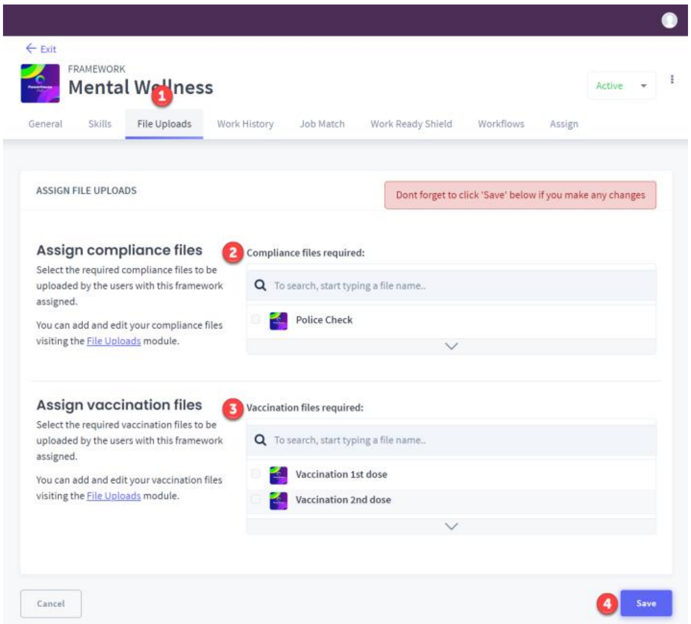


4.6.4 File Uploads

Please note that you will need to create (file uploads module) the required compliance, credential and vaccination evidence that need for this role. In the below example credential files aren't appearing because they haven't been created.

1. Click the File Uploads tab
2. Select the required compliance files required for the role

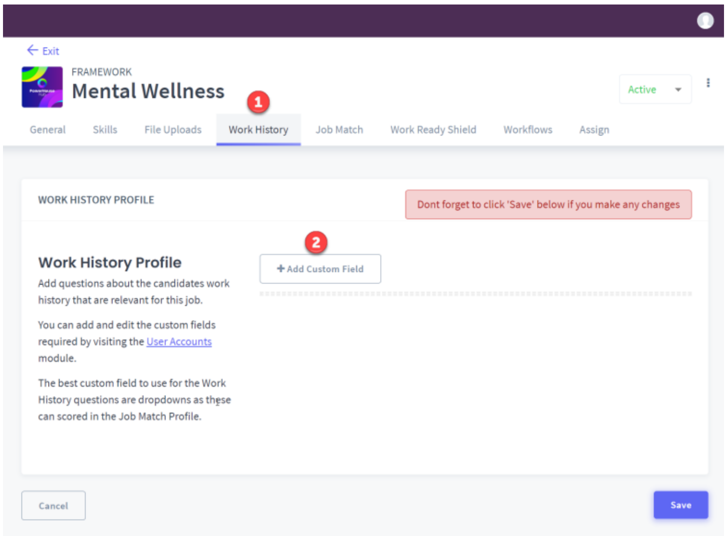
3. Select the required vaccination files required for the role
4. Click Save to save changes



4.6.5 Work History

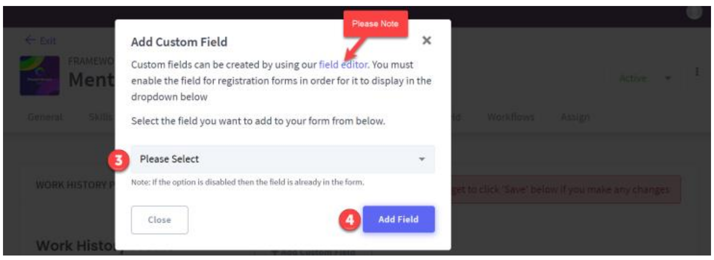
In this section you can add questions about the candidate's work history.

1. Click the work history tab
2. Click add custom field

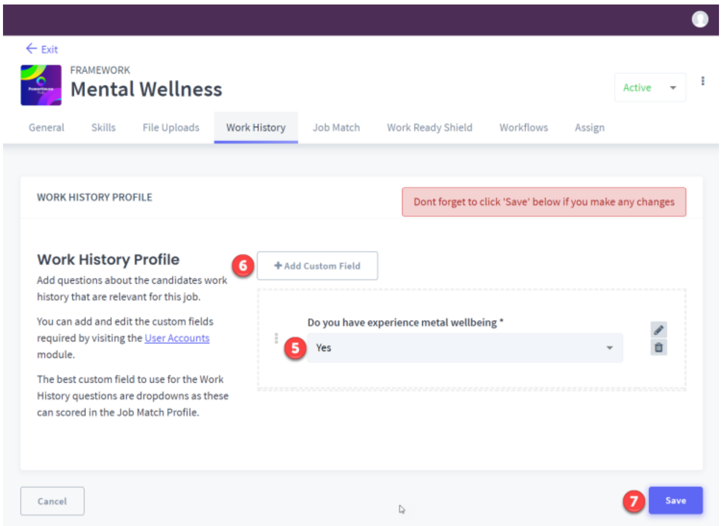


3. Select the question that you want to add from the drop down box
4. Click add field

Please note, if you haven't already created a question, you can do so by clicking the field editor link



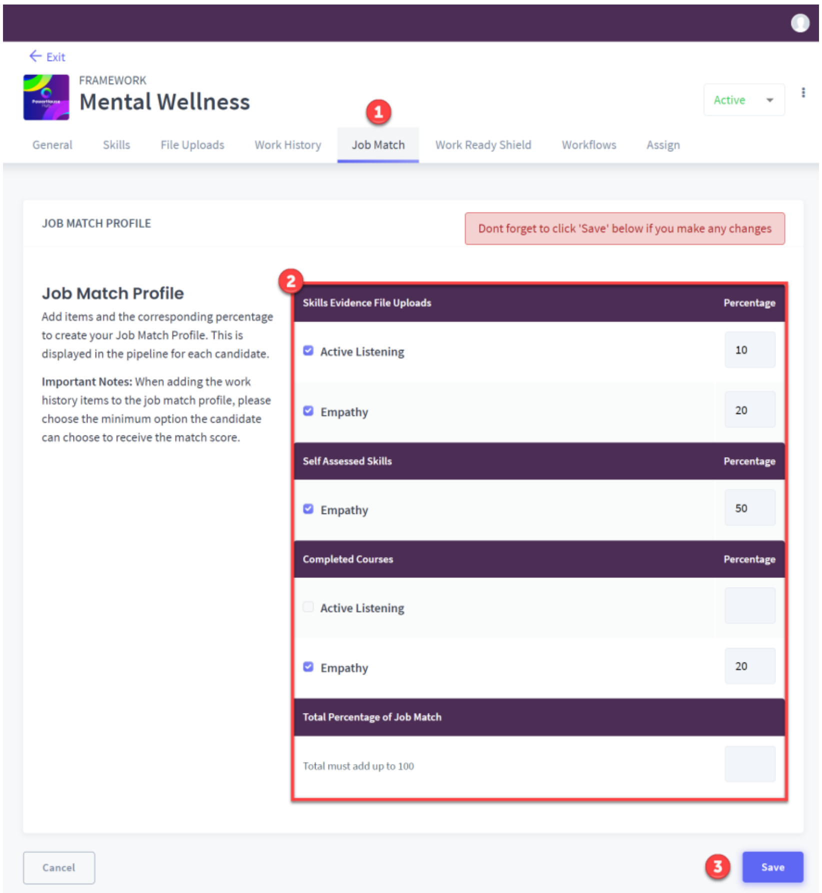
5. Choose the required answer from the drop down box
6. Click add custom field to add multiple questions
7. Click Save to save changes



4.6.6 Job Match

Select the items and the corresponding percentage to create your Job Match Profile. This is displayed in the pipeline for each candidate.

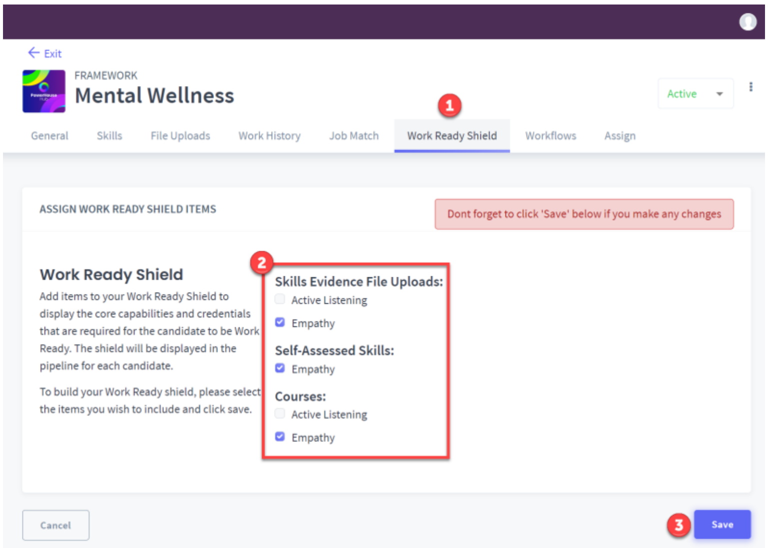
1. Click the Job Match tab
2. Select the items you would like in your Job Match and rate the importance as a percentage. All selected items must add up to 100%
3. Click Save to save changes



4.6.7 Work Ready Shield

Add items to your Work Ready Shield to display the core capabilities and credentials that are required for the candidate to be Work Ready. The shield will be displayed in the pipeline for each candidate.

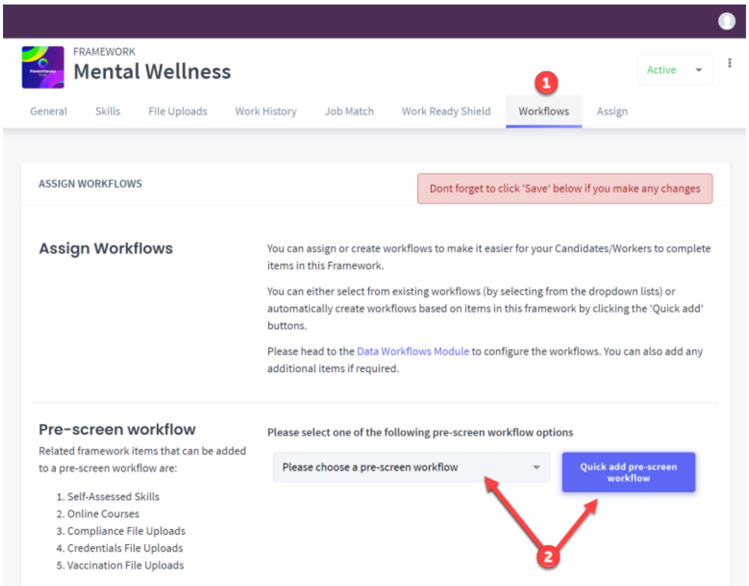
1. Click the Work Read Shield tab
2. Select the items you require for the candidate to be ready for work
3. Click Save to save changes



4.6.8 Workflows

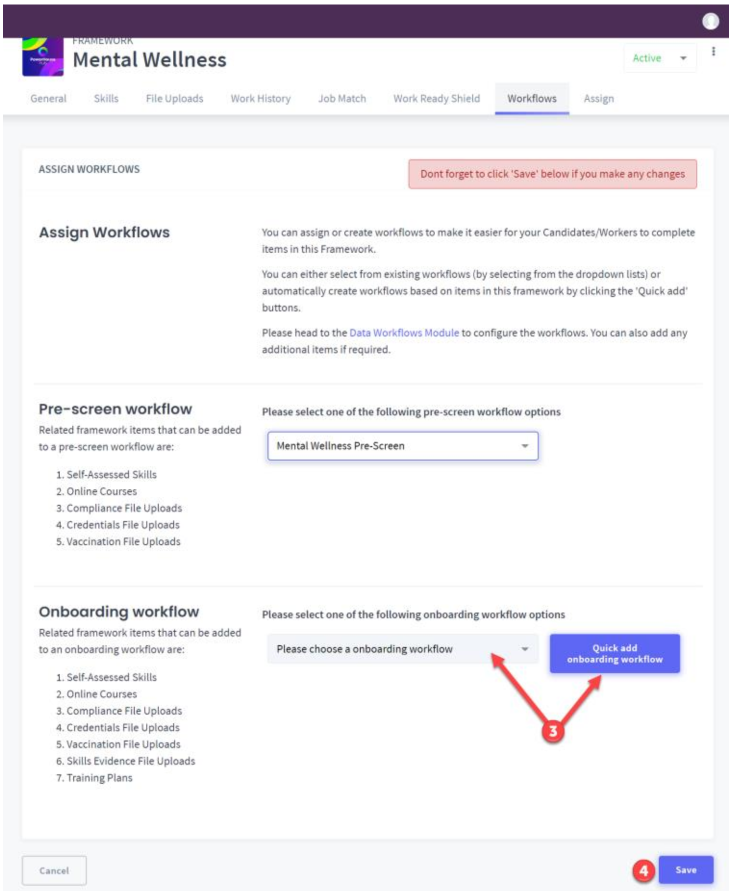
You can assign or create workflows to make it easier for your Candidates/Workers to complete items in this Framework. You can either select from existing workflows (by selecting from the dropdown lists) or automatically create workflows based on items in this framework by clicking the 'Quick add' buttons.

1. Click the Workflows tab
2. Select a pre-existing pre-screen workflow from the job down box or click Quick add pre screen workflow



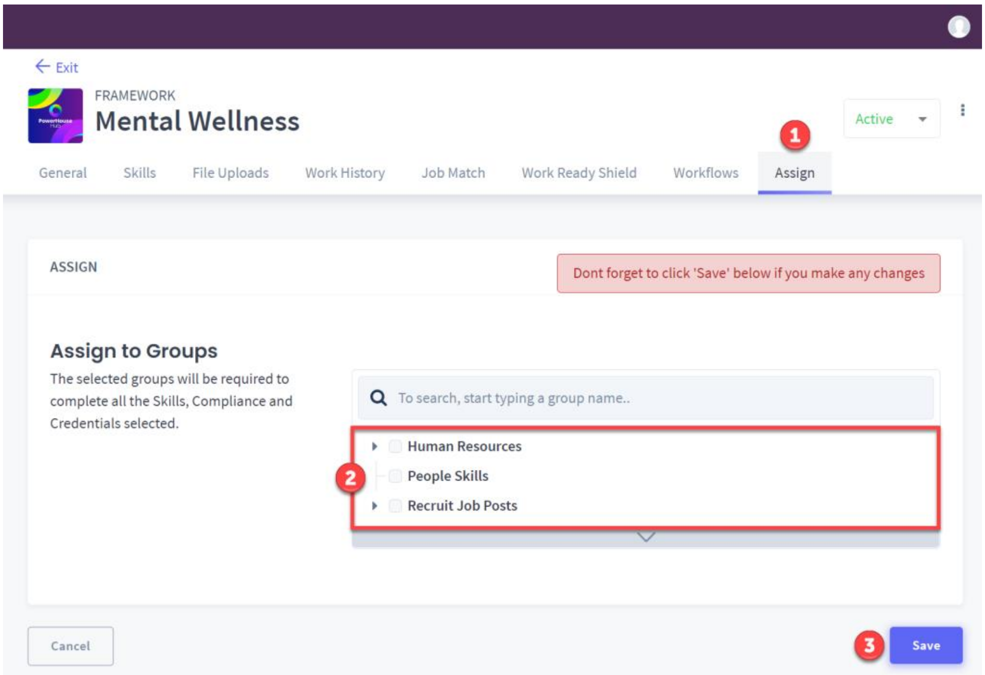
3. Select a pre-existing onboarding workflow from the job down box or click Quick add onboarding workflow

4. Click Save to save changes



4.6.9 Assign Framework

1. Click the Assign tab
2. The selected group(s) will be required to complete all the skills, compliance and credentials selected.
3. Click Save to save changes



4.7 File Uploads

The File Uploads module allows you to keep your organisation compliant. It allows your learners to upload certificates and other important documentation.

This module is part of the building blocks that helps bring together the workforce wallet, particularly the Skills Evidence section.

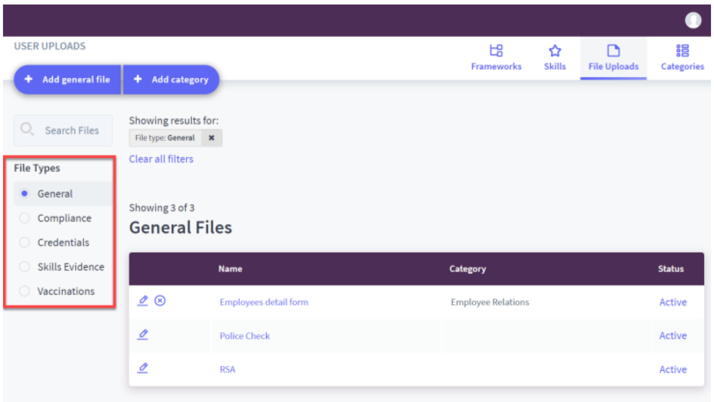
Best practice in building your foundation, is to ensure the Skills module is populated with relevant skills. It's important for you to have a full list of skills populated prior to adding Skills Evidence within File Uploads, as the Skills module allows candidates to provide evidence toward a certain skill set. For example, learners may be required to upload evidence, showing that they can perform a certain task.

4.7.1 File Types

Throughout the File Uploads module there are five file types. These include:

- General
- Compliance
- Credentials
- Skills Evidence
- Vaccinations

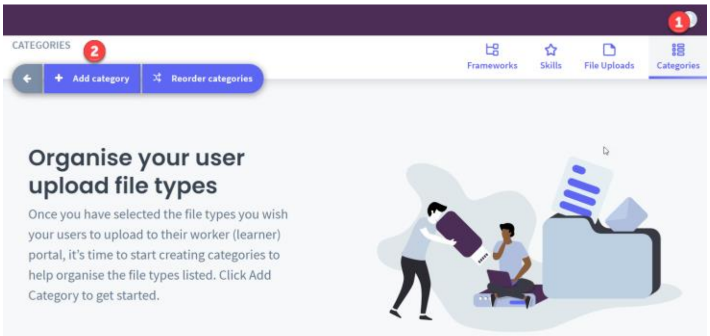
All these file types help candidates build their professional workforce wallet, ensuring best suitability for employment.



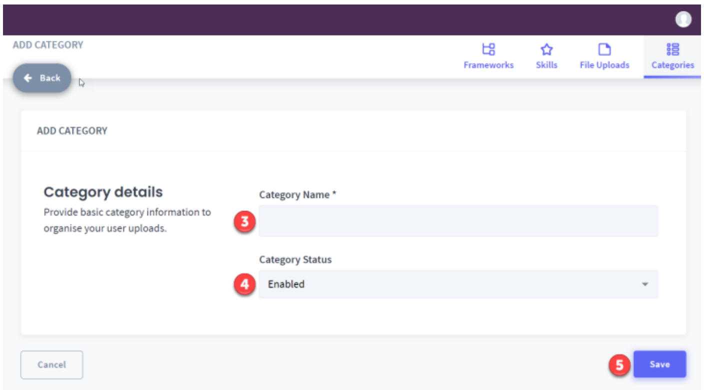
4.7.2 Categories

Once you have selected the file types you wish your users to upload to their worker (learner) portal, it's time to start creating categories to help organise the file types listed.

1. Click on the Categories tab
2. Click Add category



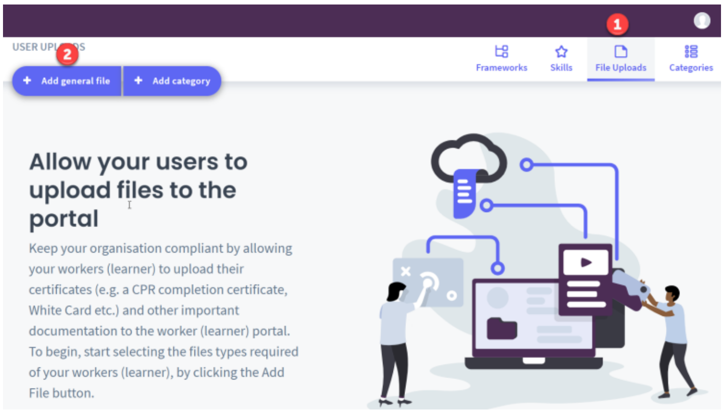
3. Add a category title
4. Set the status. **Active**: Category is live on the platform and users can upload their certificates. **Disabled**: Category cannot be seen on the platform.
5. Click Save to Save changes



4.7.3 Adding a File

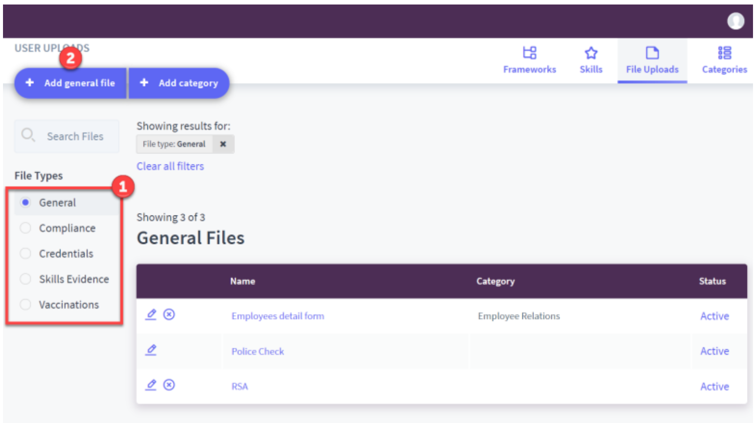
When adding a file for the first time you will only have the option to add a general.

1. Click on the File Uploads tab
2. Click Add General File

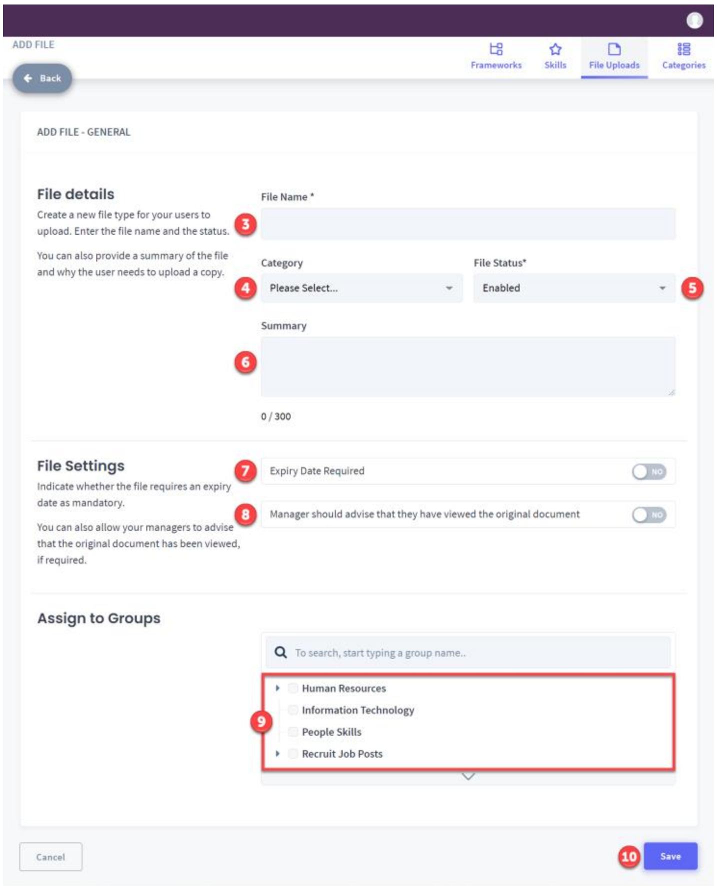


When adding subsequent files (general, compliance credential, skills evidence or vaccination) your screen will look slightly different.

1. Select the File Type you need
2. Click Add file

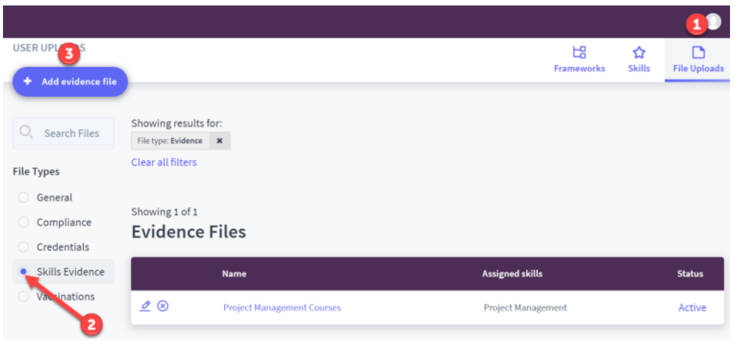


3. Enter the File Name
4. Select the category
5. Set the file status. **Active**: File is live on the platform and users can upload their certificates. **Disabled**: File cannot be seen in the users portal.
6. Add a summary
7. Toggle ON/OFF if a expiry date is required
8. Toggle YES/NO if the manager should advise that they have viewed the original document
9. Assign to the relevant group(s)
10. Click Save to save changes



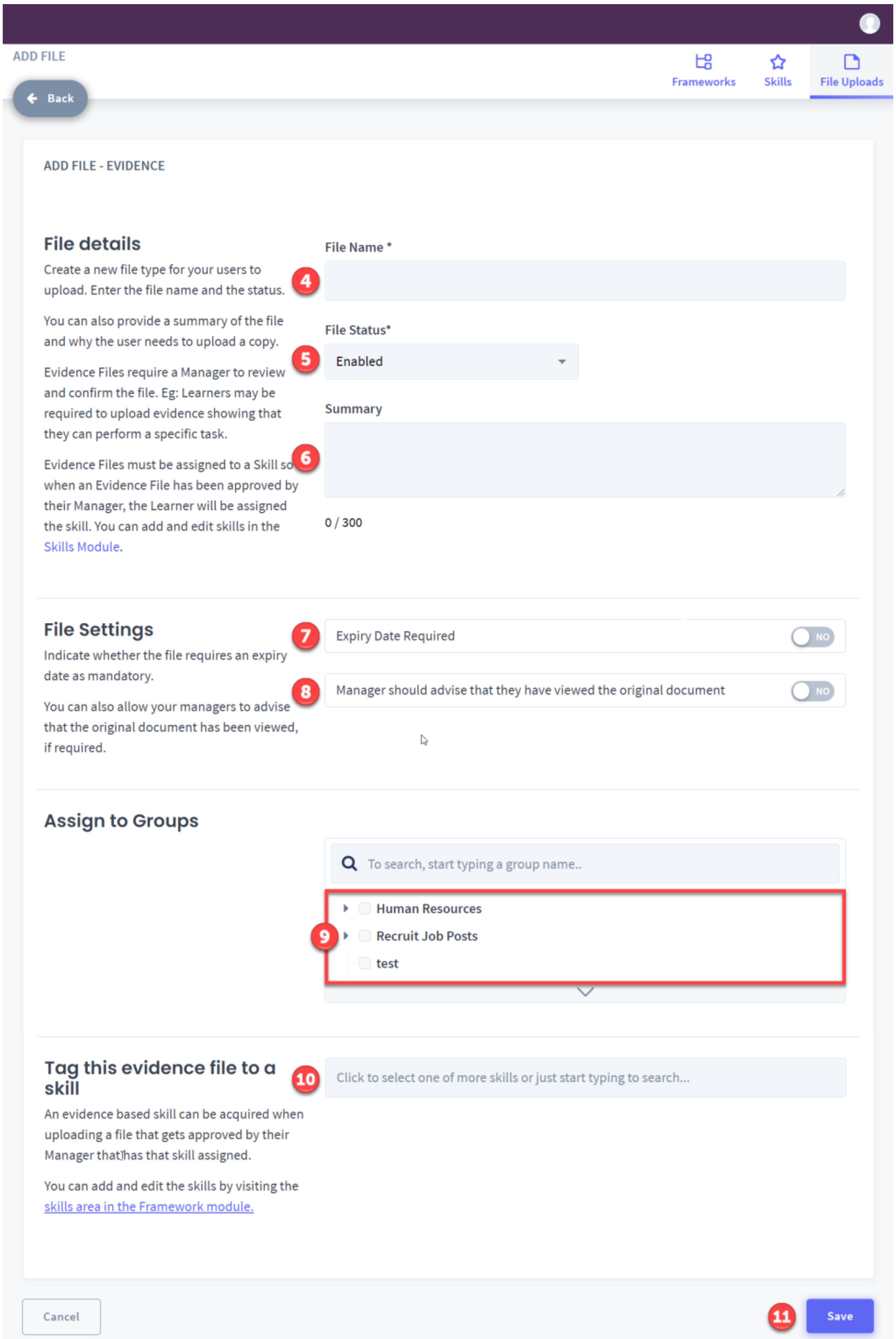
4.7.4 Adding a Skills Evidence File Upload

1. Click on the File Uploads tab
2. Select Skills Evidence
3. Click Add evidence file



4. Enter the File Name

5. Set the file status. **Active**: File is live on the platform and users can upload their certificates. **Disabled**: File cannot be seen in the users portal.
6. Add a summary as to why the learner needs this skill
7. Toggle ON/OFF if an expiry date is required
8. Toggle YES/NO if the manager should advise that they have viewed the original document
9. Assign to the relevant group(s)
10. Tag this evidence to a particular skill(s)
11. Click Save to save changes



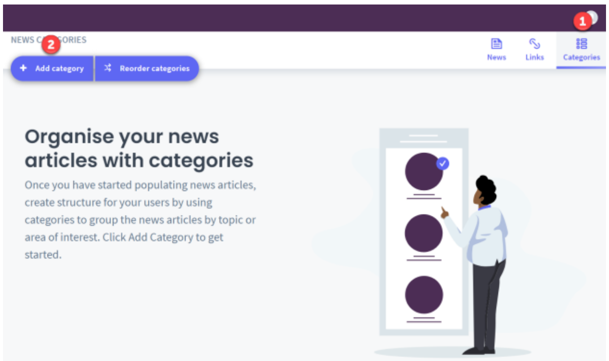
5. Communication

5.1 News Manager

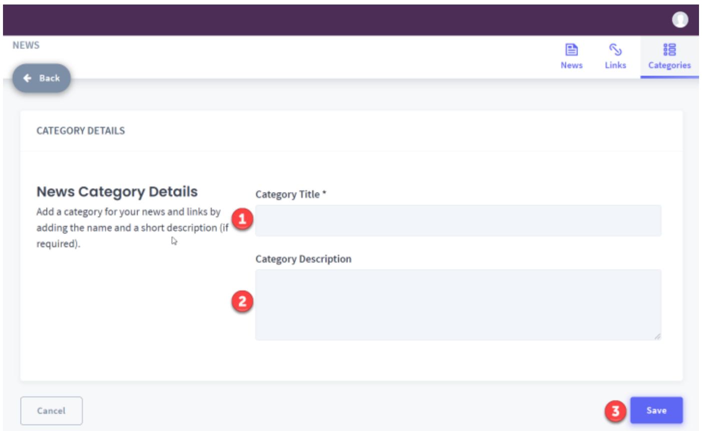
Broadcast company updates and announcements to your users through the News Editor. You can also choose to email updates to your staff with the click of a button. Simply write your news update, consider adding relevant links or images, then assign it to user groups.

5.1.1 Adding a News Category

1. Click on the Categories tab
2. Click Add category

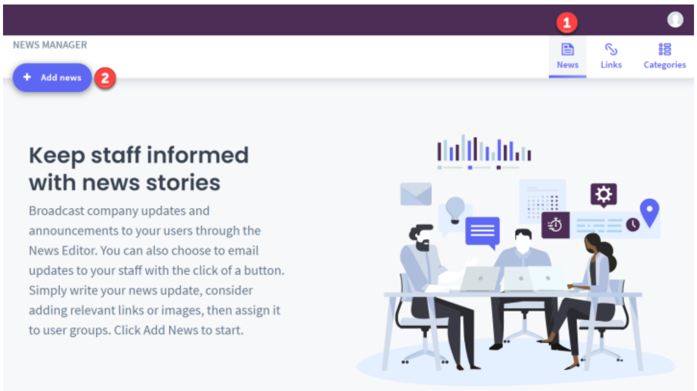


3. Add a category title
4. Add a description
5. Click Save to save changes

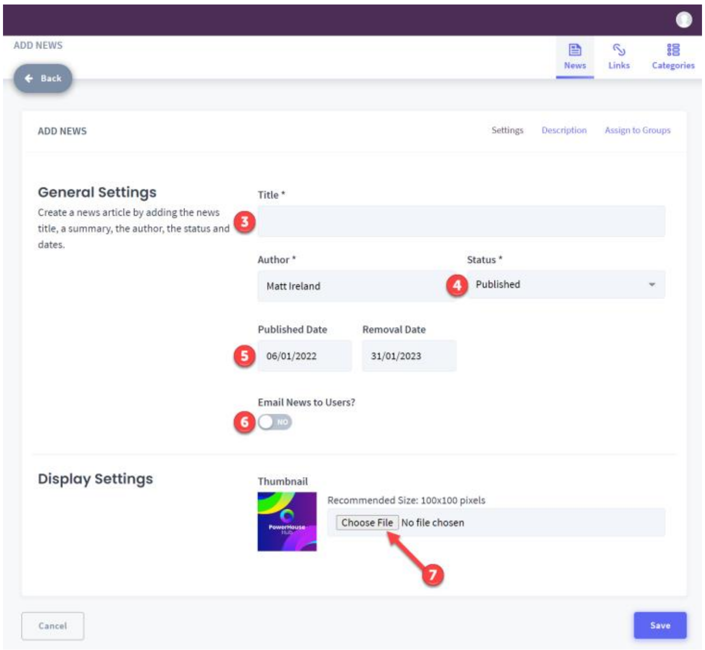


5.1.2 Add News

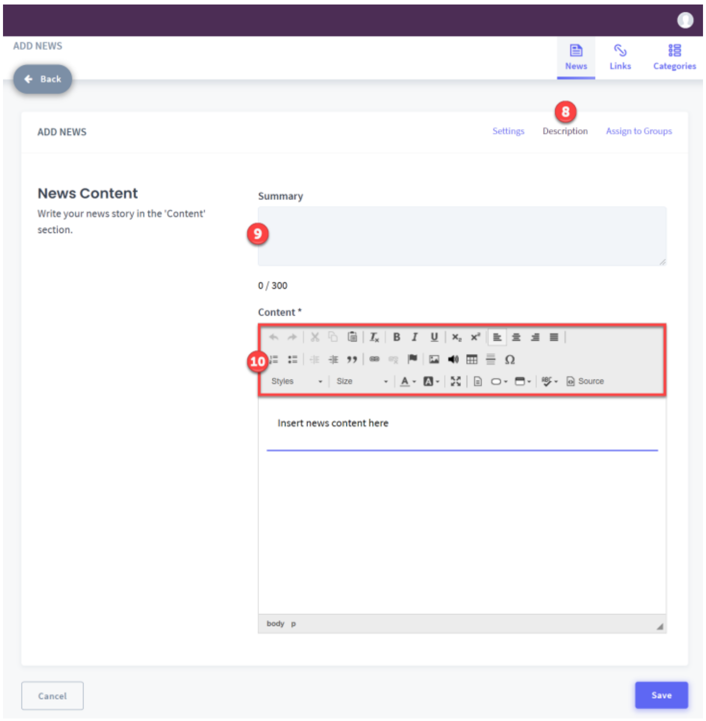
1. Click on the News tab
2. Click Add news



3. Add a title
4. Set the status. Published: news article is live and can be viewed. Draft: Keeps new hidden from learner
5. Add a publish and removal date. Learners won't be able to view the news article until the selected publish date and won't be able to view after the removal date.
6. Toggle YES/NO to email news to users. This is useful for important news updates
7. Click choose file to upload a thumbnail image

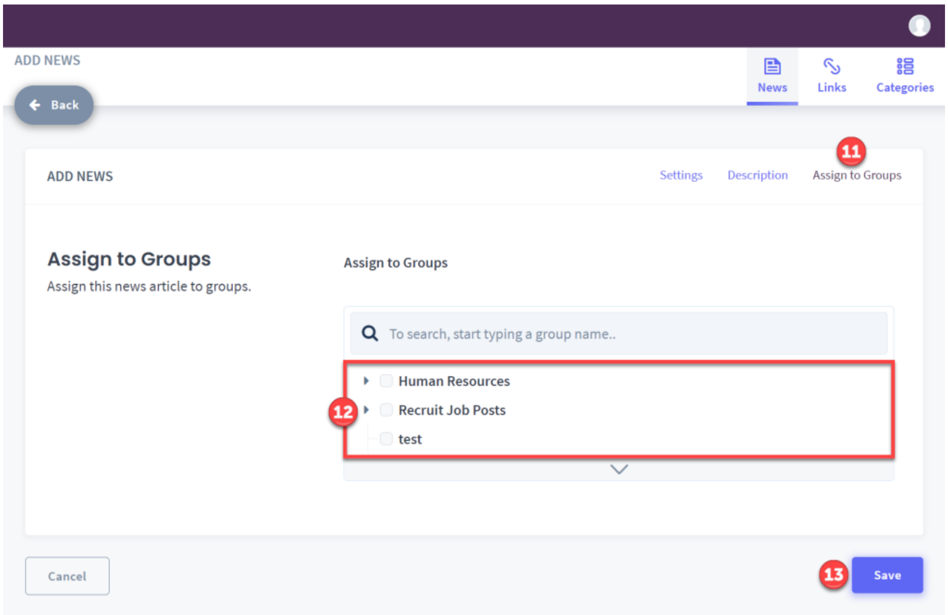


8. Click the Description link
9. Add a summary
10. Add content using CK Editor options to make the article engaging



11. Click the Assign to Groups link
12. Assign news article to the relevant group(s)

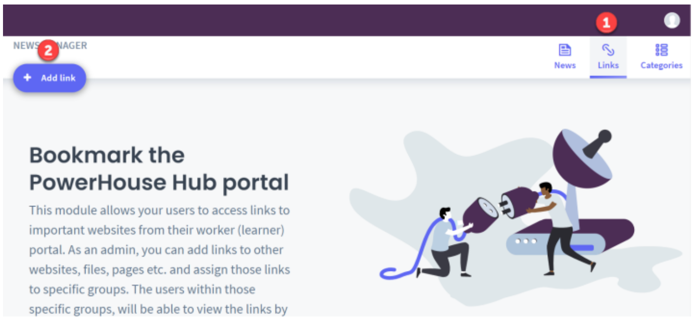
13. Click Save to save changes



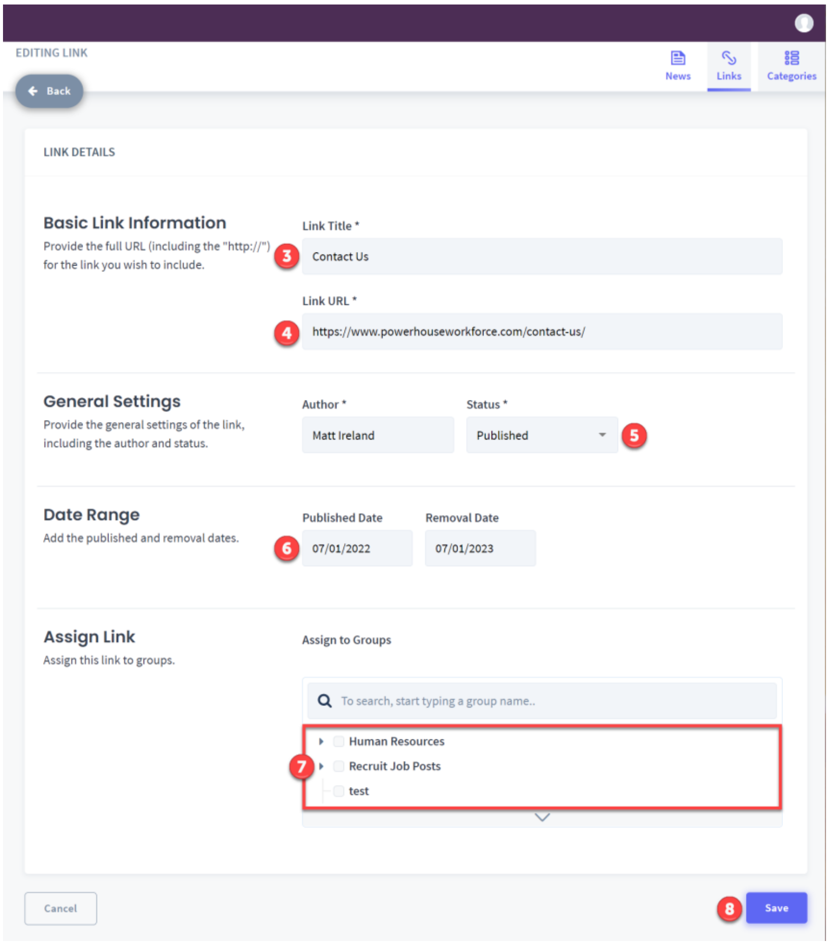
5.1.3 Adding Links

This module allows your users to access links to important websites from their worker (learner) portal. As an admin, you can add links to other websites, files, pages etc. and assign those links to specific groups. The users within those specific groups, will be able to view the links by accessing the 'links' tab on their worker (learner) portal.

1. Click on the Links tab
2. Click Add link



3. Add a link title
4. Add link URL. Its always best practice to use the link that your organisation's website uses
5. Set the status. Published: Link is visible to learners. Draft: learners are unable to see the link
6. Add a publish and removal date. Learners won't be able to view the link until the selected publish date and won't be able to view after the removal date
7. Assign the link to the relevant group(s)
8. Click Save to save changes

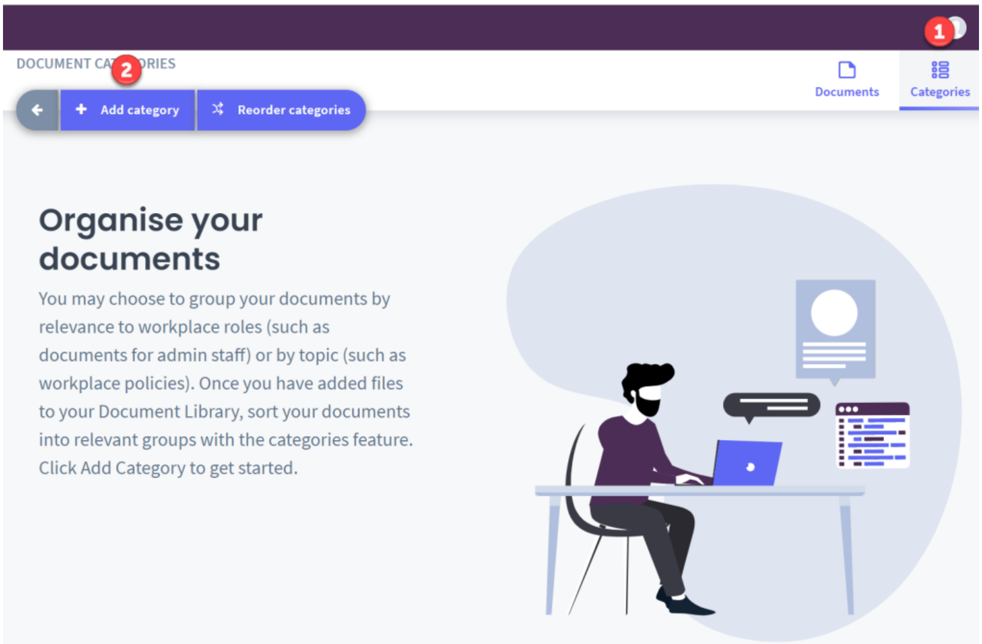


5.2 Document Library

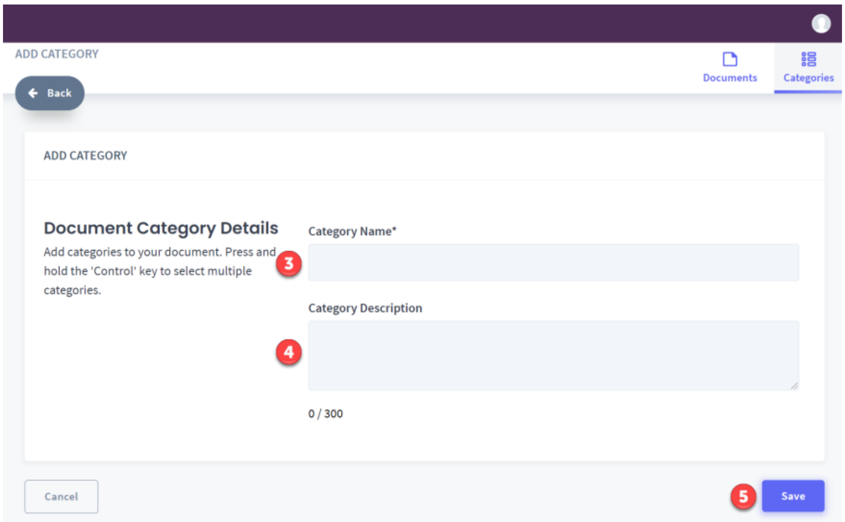
Store and distribute your key files, policies and documents to your users with the Document Library. Simply upload your files, add a description and assign the files to a category and your user groups.

5.2.1 Adding a Category

1. Click on the Categories tab
2. Click Add category

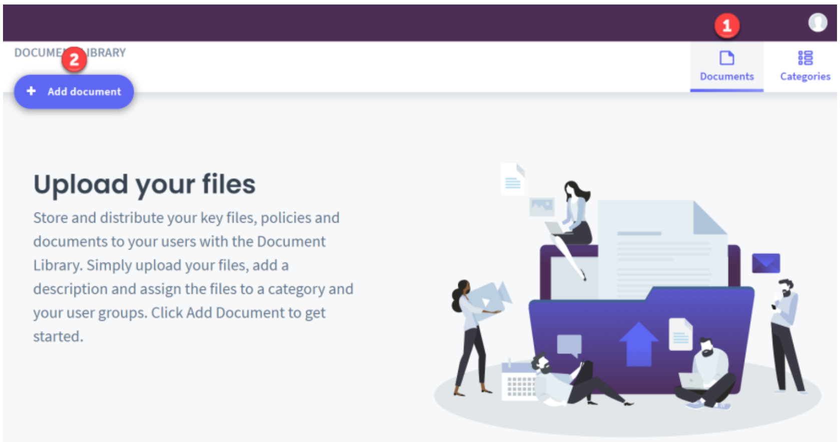


3. Add a category title
4. Add a description
5. Click Save to save changes

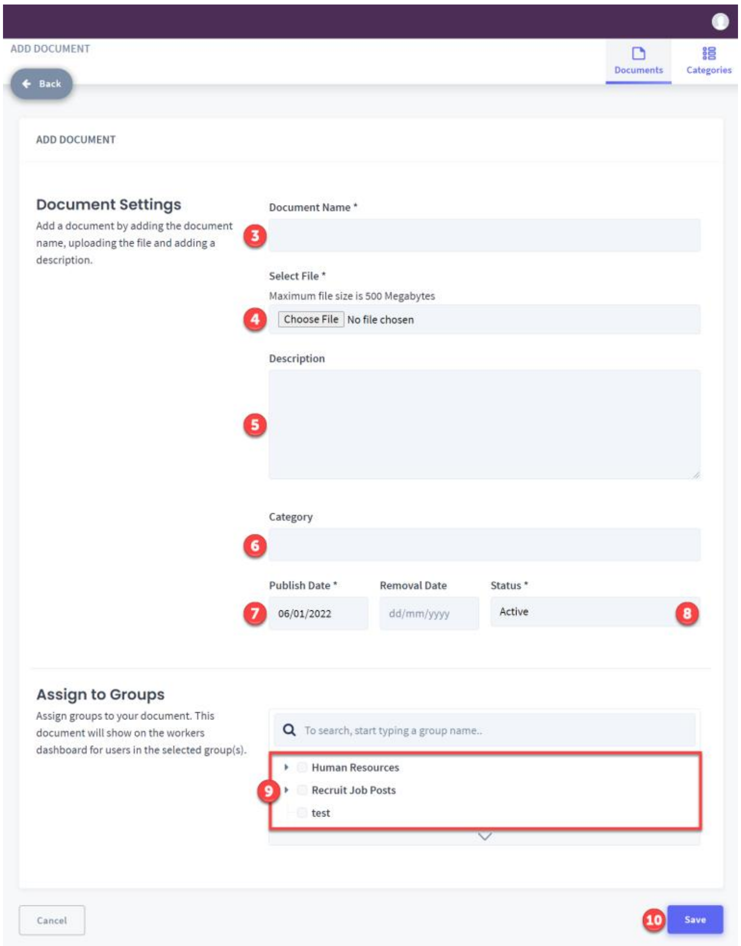


5.2.2 Adding a Document

1. Click on the Documents tab
2. Click Add document



3. Add a document name
4. Click choose file and upload the relevant file from your hard drive
5. Add a description
6. Click in the box to add to add a category
7. Add a publish and removal date. This is ideal for when contracts are running out. To avoid document overlap set the publish date to when the old contract has expired.
8. Set the file status. **Active**: Document is live and can be downloaded from the platform. **Disabled**: Document is hidden from learner.
9. Assign the link to the relevant group(s)
10. Click Save to save changes

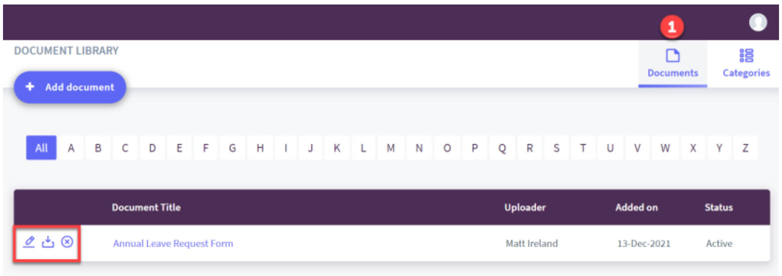


5.2.3 Document Library Actions

1. Click on the Documents tab

Documents action buttons allow you to:

- Edit the document
- Download the document
- Delete the document



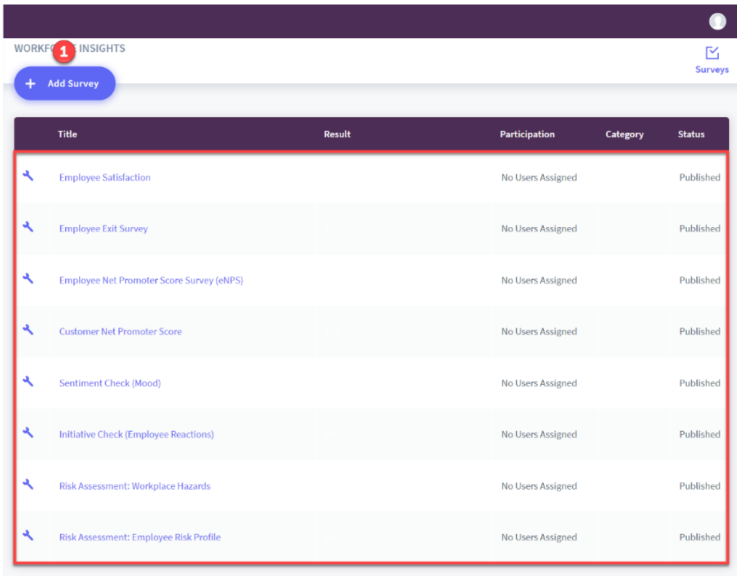
5.3 Workforce insights

This is where you can choose from pre-made surveys or create your own surveys to get insight from your workforce. Surveys can be sent as a one off or automatically sent after a selected number of days.

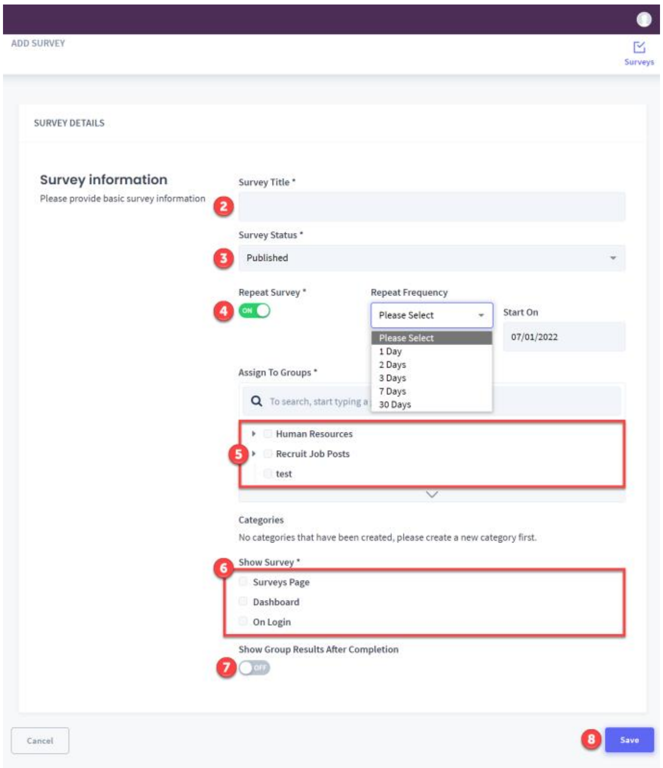
5.3.1 Adding a survey

Please note there are 8 pre-created surveys that you can use and edit, which are highlighted in the red box below. These will be cover in more depth in section 5.3.4.

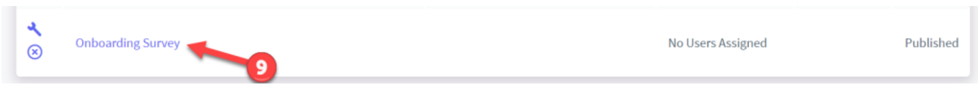
1. Click Add Survey



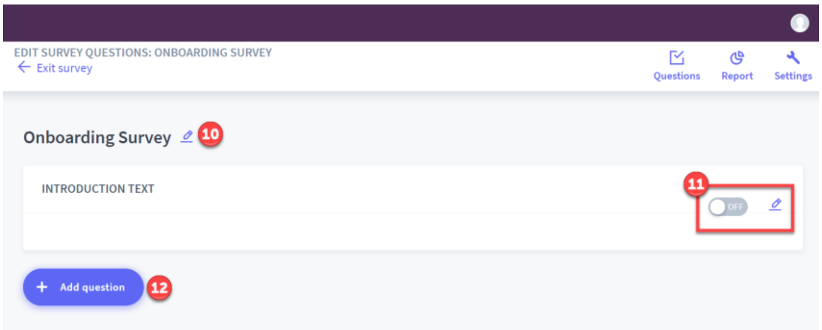
2. Add a survey title
3. Set the survey status: Published: Survey is live and is ready to be completed. Disabled: Learners won't be able to see the survey on the platform.
4. Toggle ON to repeat the survey, select repeat frequency and start on date
5. Assign the survey to the relevant group(s)
6. Select where you want the survey to be seen on the learner's portal
7. Toggle ON to show group results after completion
8. Click Save to save changes



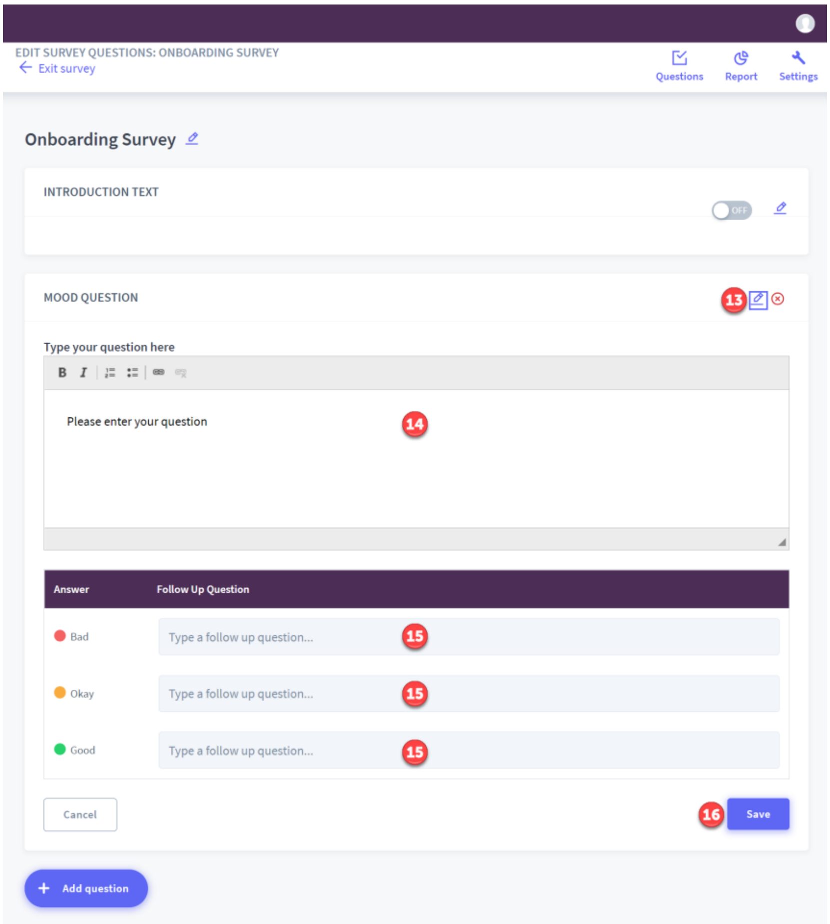
9. Click on the title of the survey you just created



10. Click to edit title
11. Toggle On and click to edit intro to add introduction text
12. Click to add question. There are 5 question types:
    - Mood question. Answers include Bad, Okay and Good
    - Thumbs question. Answers include No, Somewhat and Yes
    - Star question. Answers include No, Somewhat and Yes
    - Time question. Answers include Never, Sometimes and Often
    - Quality question. Answers include Low, Medium and High

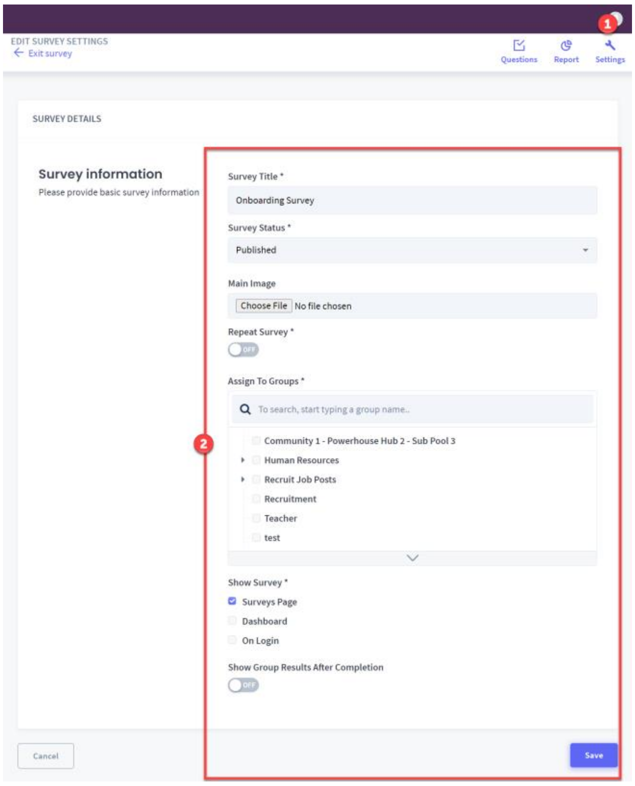


13. Click to edit question
14. Click to type your question
15. Type your follow up question for the three answers. This will be seen by the learner after they have answered the question
16. Click Save and then add as many questions as needed to complete the survey



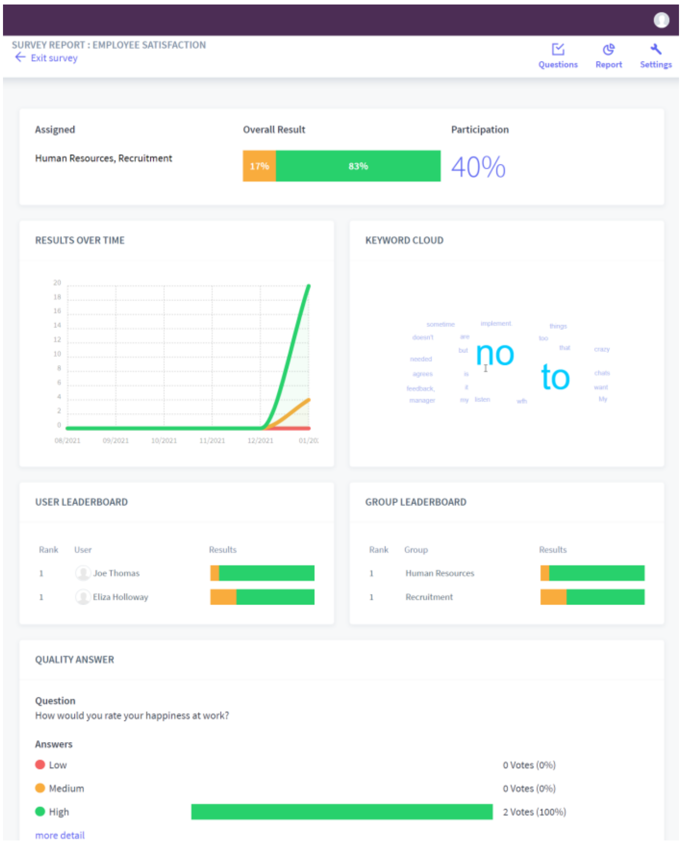
5.3.2 Settings

1. Click the Settings tab
2. This is where you can make changes to the survey information



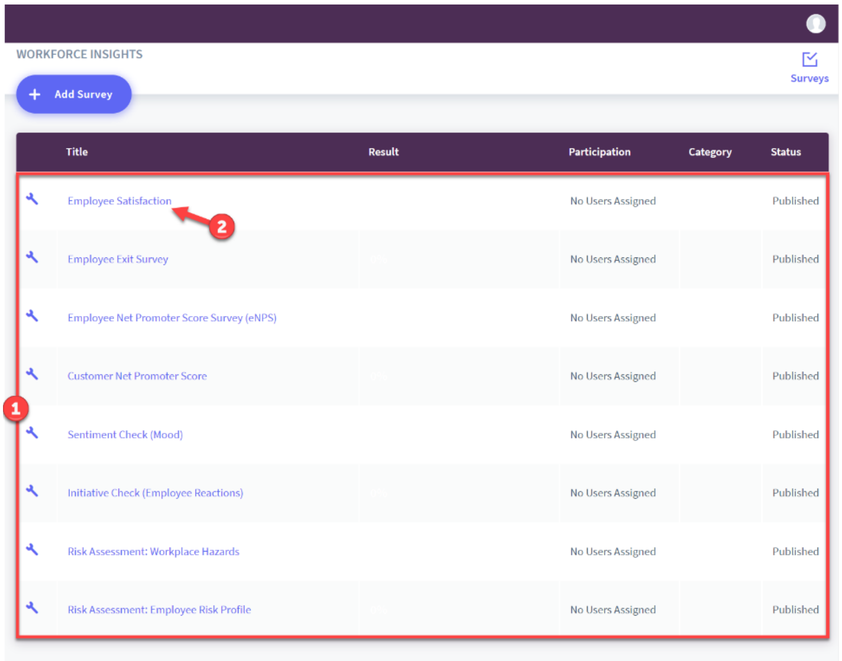
5.3.3 Report

1. Click on the Report tab
2. Review the results of your chosen survey

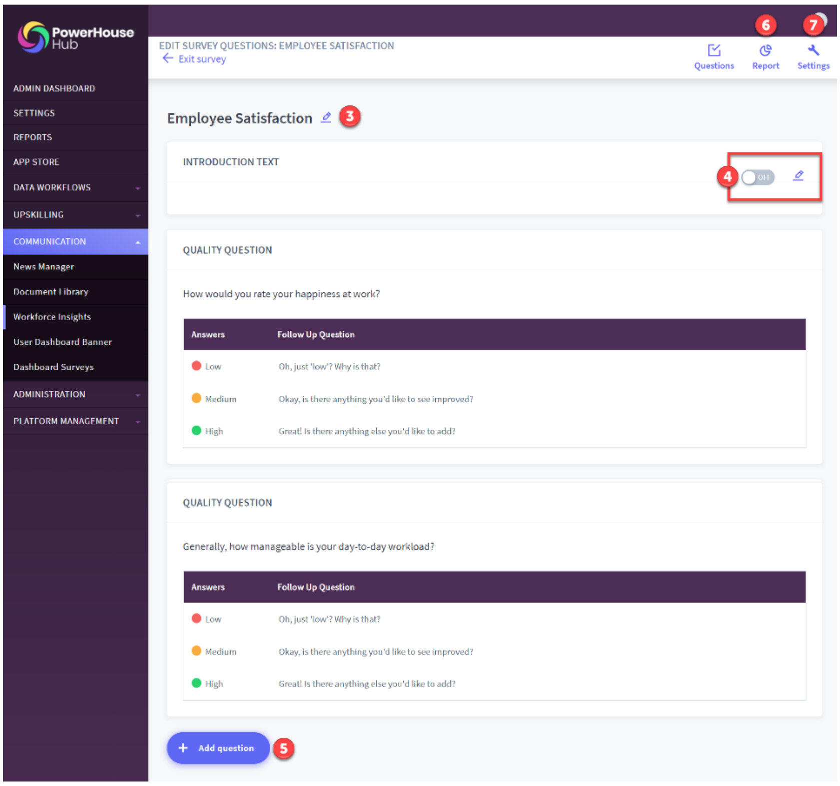


5.3.4 Pre-made Surveys

1. There are 8 pre-made survey's that you can edit
2. Click on the survey title to edit



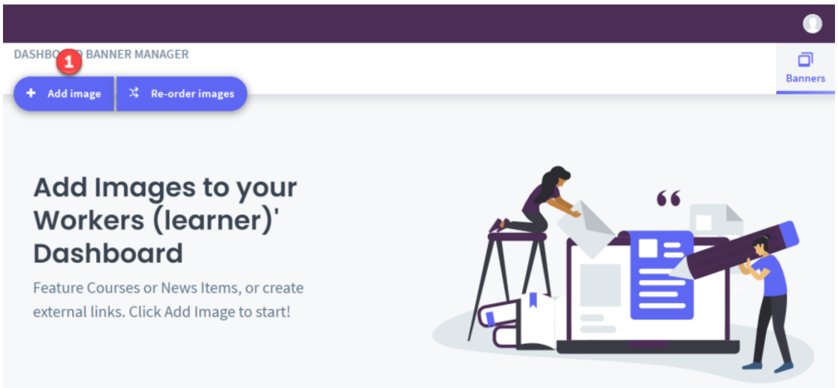
3. Click to edit survey title and click save
4. Toggle On and click to edit intro to add introduction text
5. Click to add another question
6. Click to view survey reports
7. Click to edit survey settings



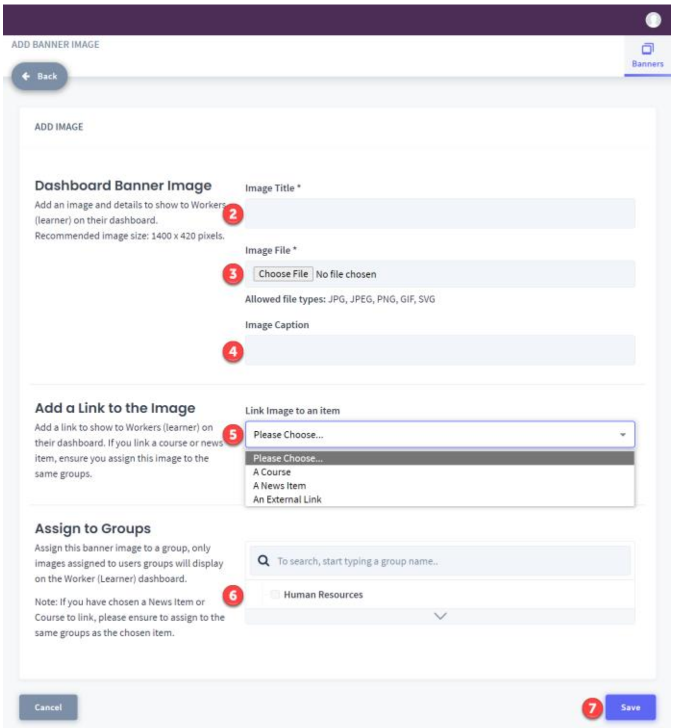
5.4 User Dashboard Banner

Dashboard banner module allows you to feature courses or news items, or external links to a learners dashboard banner

1. Click add image



2. Add image title
3. Click Choose File and upload image form your hard drive. Recommended image size is 1400x420 pixels
4. Add an image caption
5. Click the drop down box to link the image to an image. Options include a course, a news item, an external link
6. Assign the banner image to a group(s)
7. Click Save to save changes

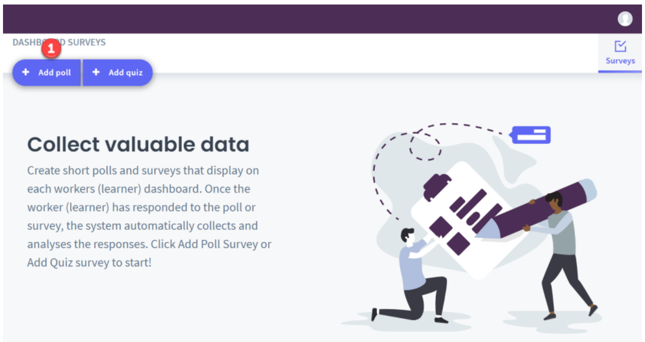


5.5 Dashboard Surveys

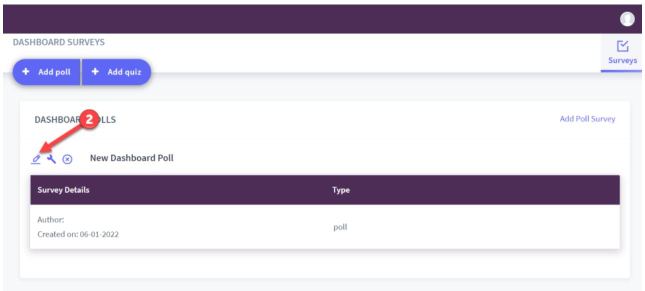
Dashboard Surveys can collect valuable data for your organisational needs. Create short polls and surveys that display on each worker (learner) dashboard. Once the worker (Learner) has responded to the poll or survey, the system automatically collects and analyses the responses.

5.5.1 Add a Poll (True & False Question)

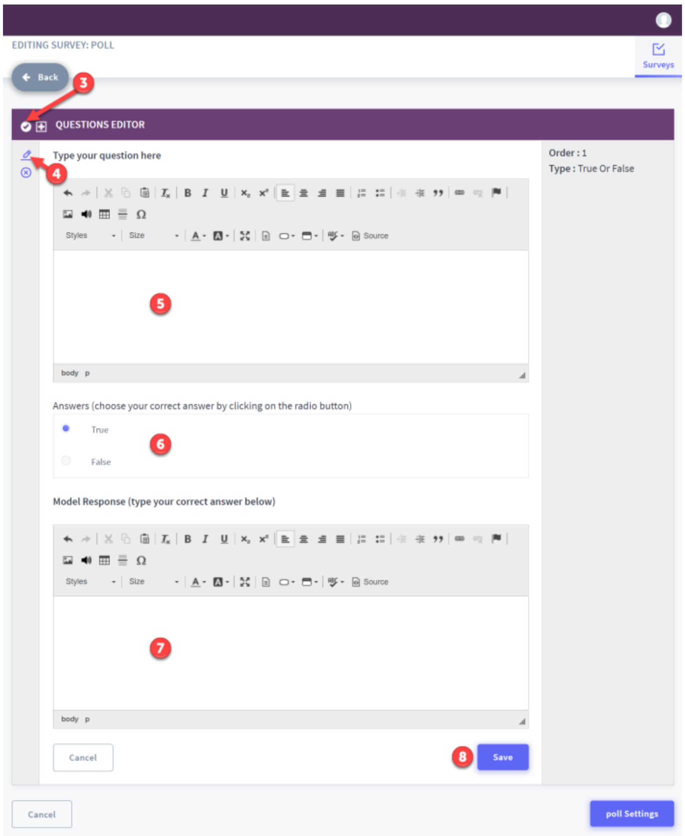
1. Click Add poll



2. Click edit to add questions

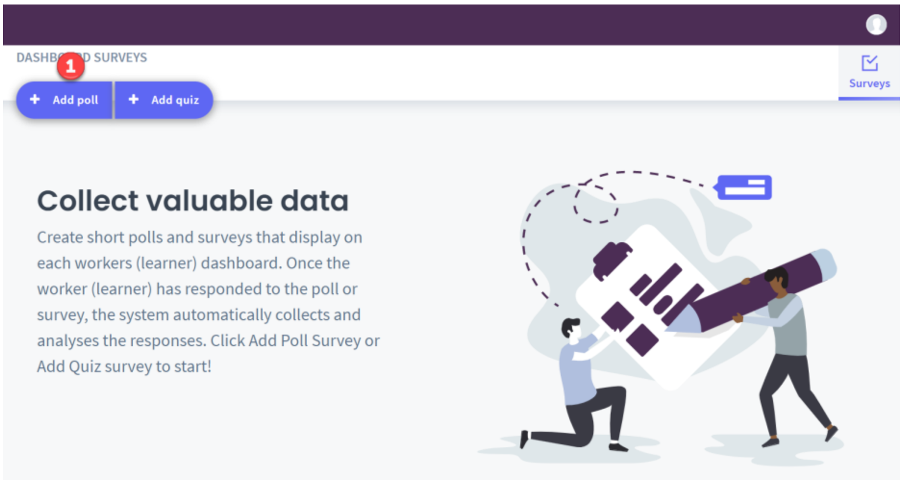


3. Click to add true and false question
4. Click the edit question icon
5. Click in box to type your question
6. Choose the correct answer by clicking on the radio button
7. Click in box to type the correct answer
8. Go back to step 2 to add additional questions. When finished click Save to save changes

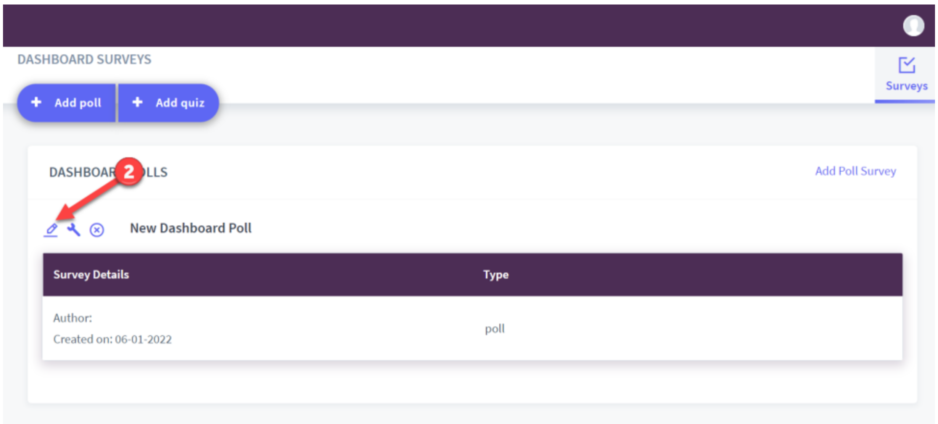


5.5.2 Add a Poll (Multiple Choice Question)

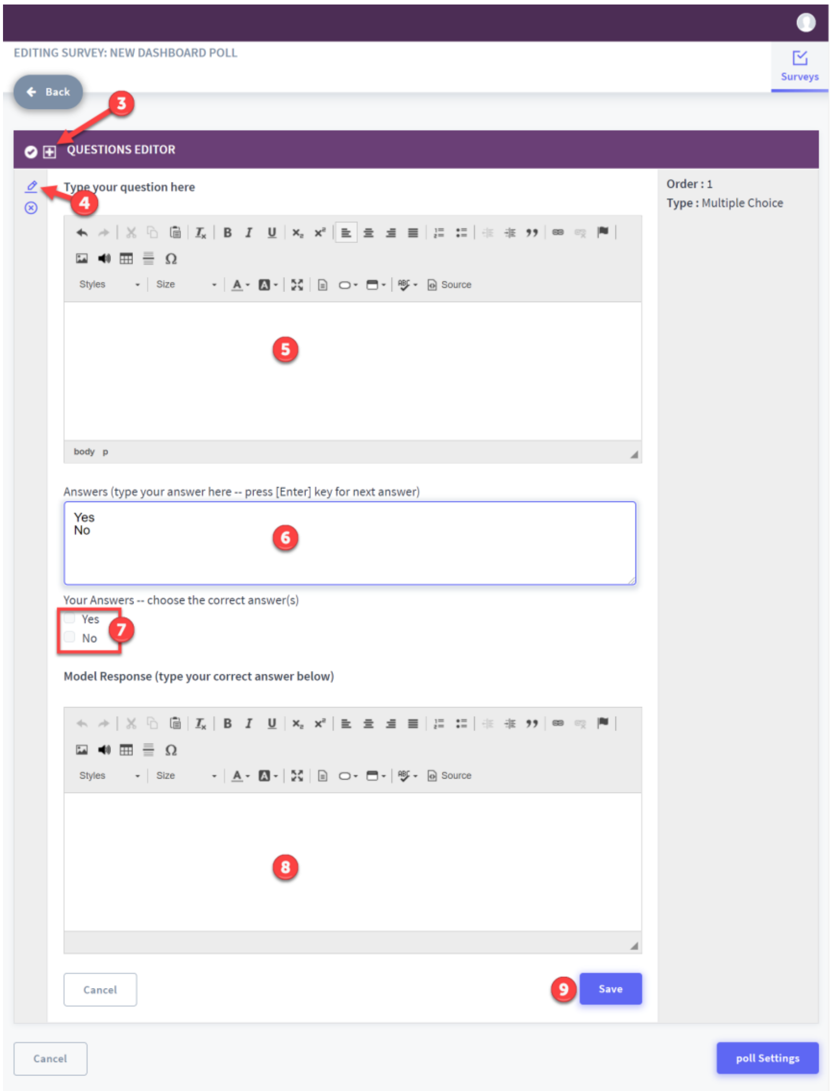
1. Click Add poll



2. Click edit to add questions

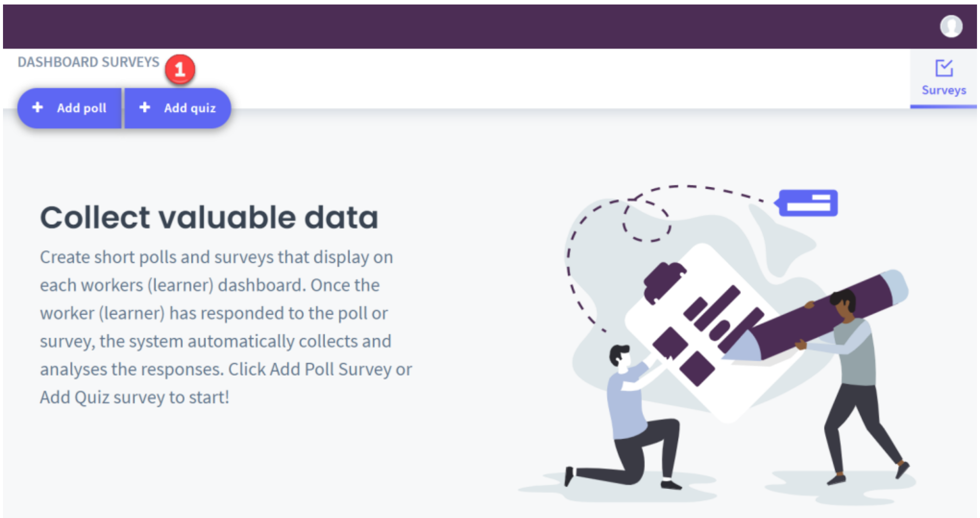


3. Click to add multiple choice question
4. Click the edit question icon
5. Click in box to type your question
6. Click in box to type your multiple-choice questions. Press [enter] key to type next multiple-choice answer. You can add as many answers as you need
7. Select the tick box next to the correct answer
8. Click in box to type the correct answer
9. Go back to step 2 to add additional questions. When finished click Save to save changes

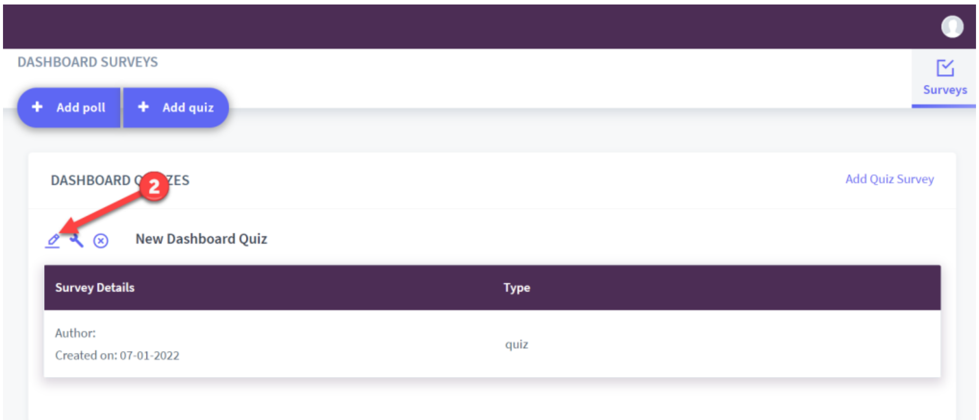


5.5.3 Add a quiz (True & False Question)

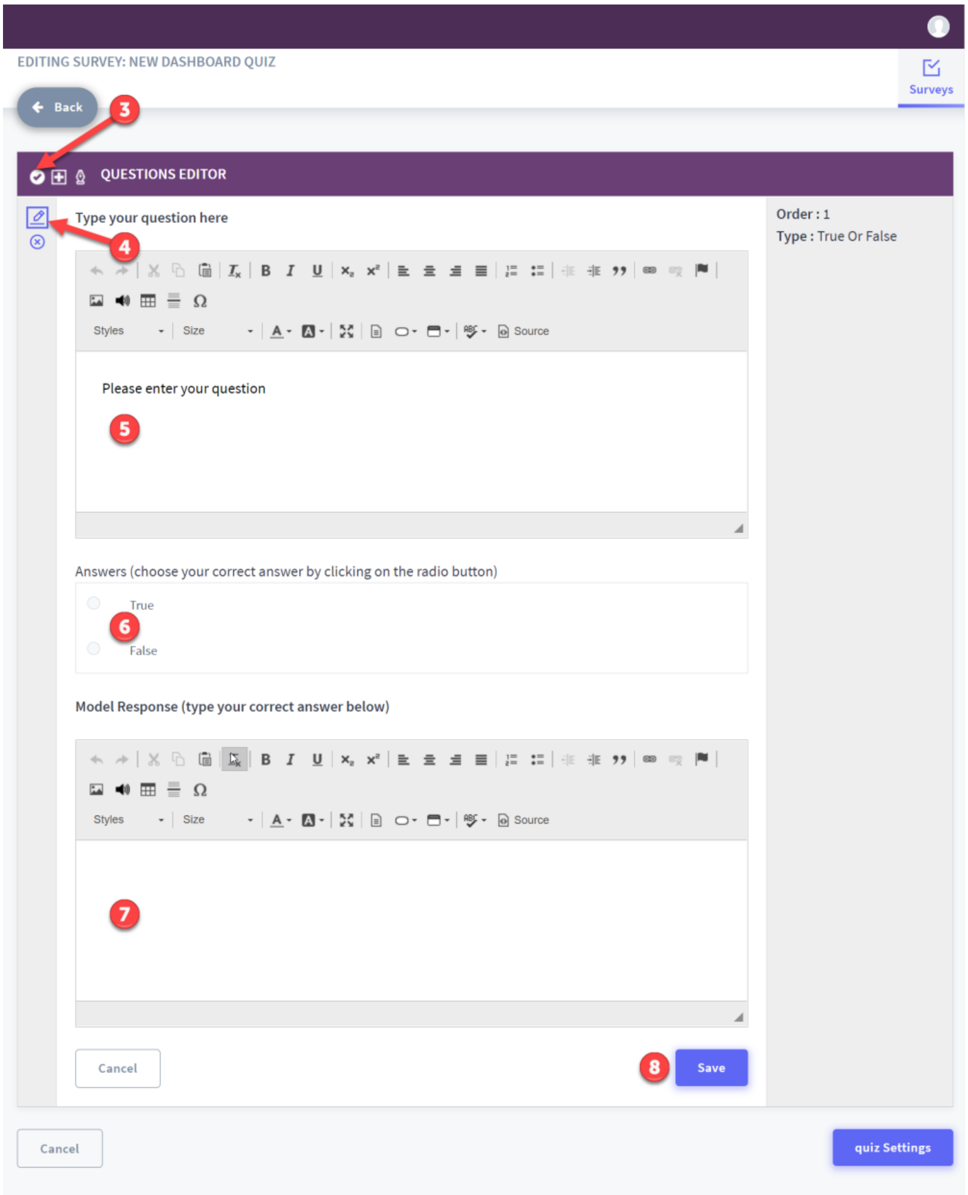
1. Click add quiz



2. Click edit to add question

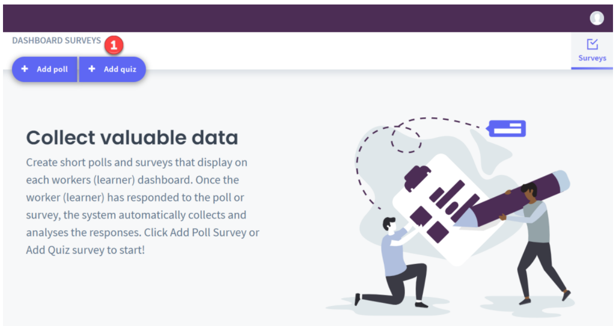


3. Click to add true & false question
4. Click edit question
5. Click in box to type your question
6. Click on the radio box to choose your correct answer
7. Click in box to type the correct answer
8. Go back to step 3 to add additional questions. When finished click Save to save changes

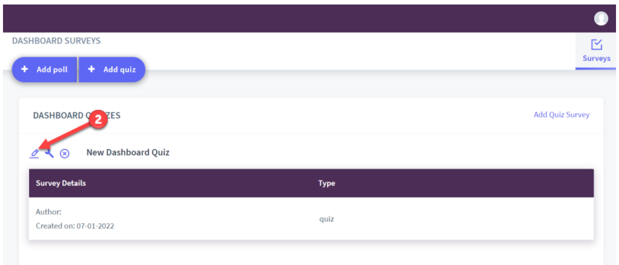


5.5.4 Add a Quiz (Add Multiple Choice Question)

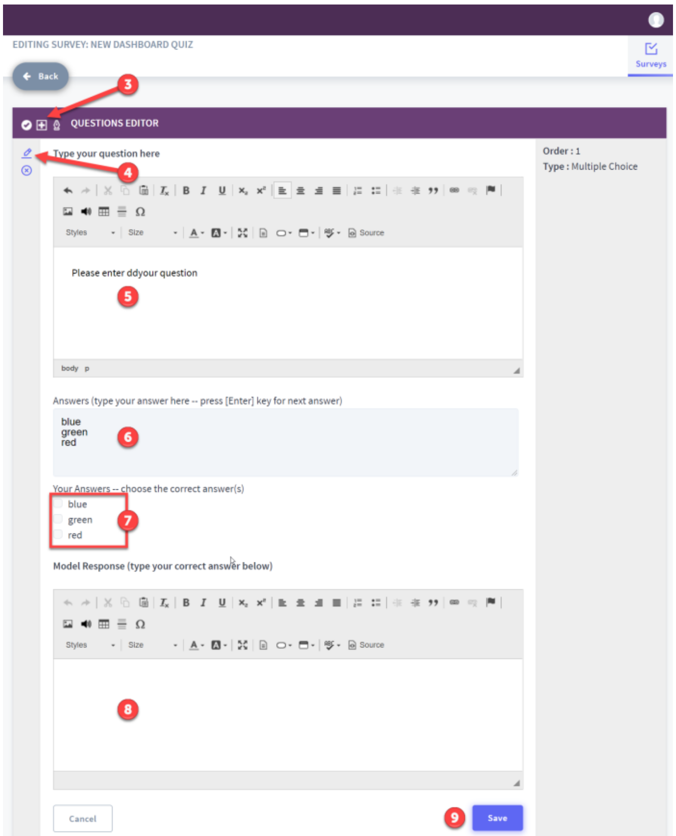
1. Click add quiz



2. Click edit to add question

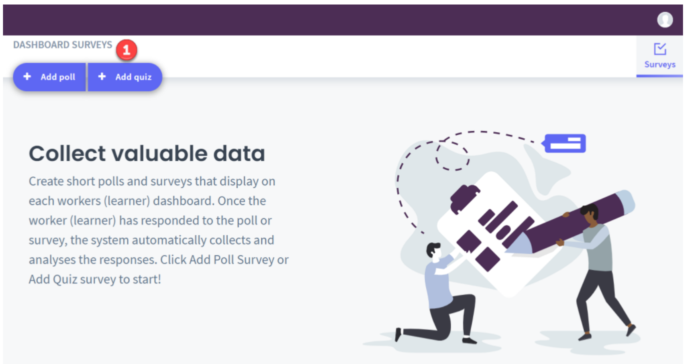


3. Click to add multiple choice question
4. Click edit question
5. Click in box to type your question
6. Click in box to type your answer. Press [enter] key to type next multiple choice answer
7. Select the correct answer
8. Click in box to type the correct answer
9. Go back to step 3 to add additional questions. When finished click Save to save changes

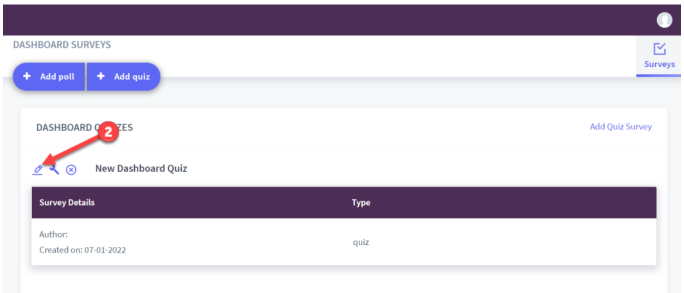


5.5.5 Add a Quiz (Short Answer Question)

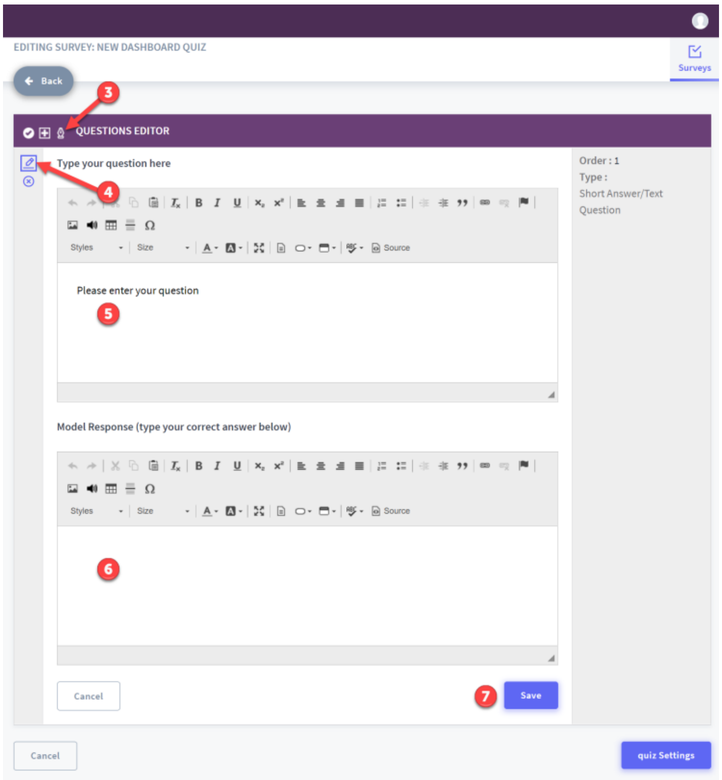
1. Click add quiz



2. Click edit to add question

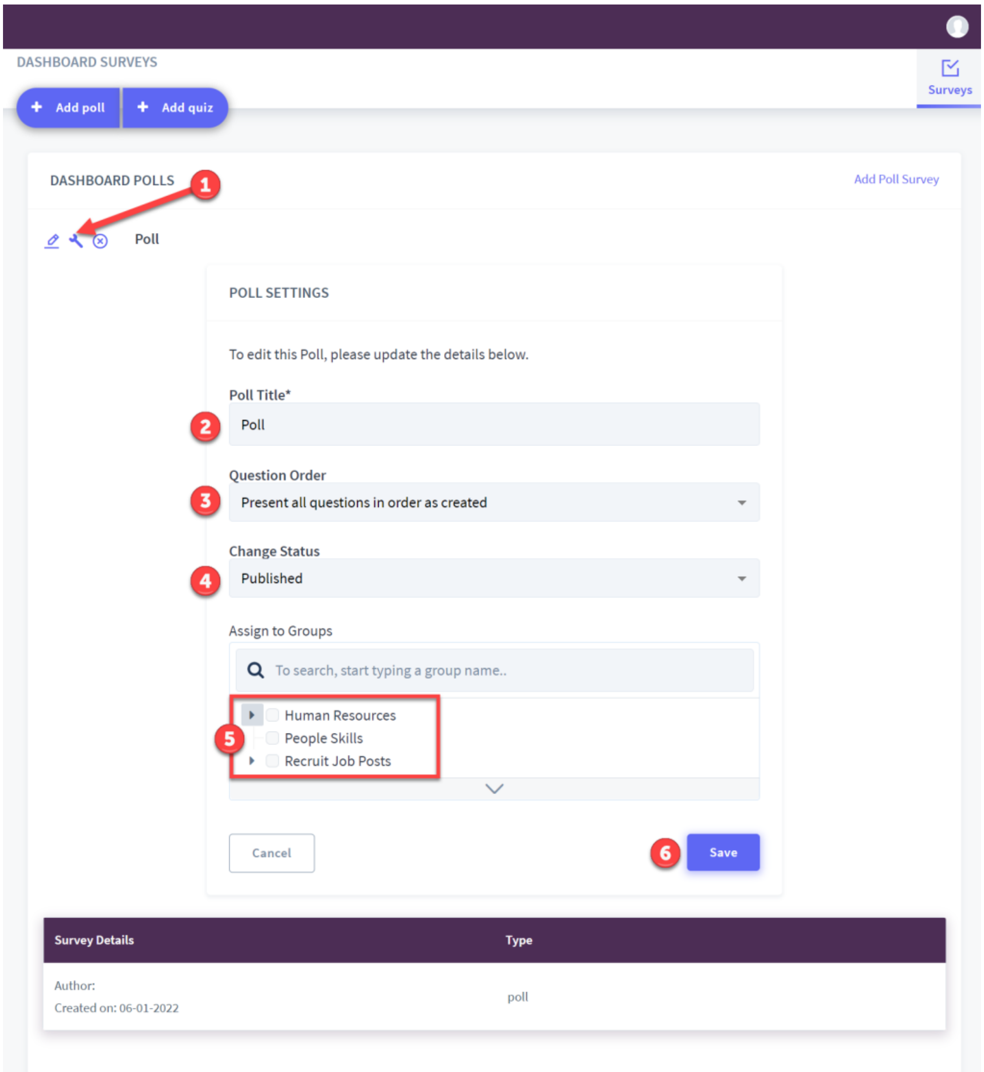


3. Click to add short answer question
4. Click edit question
5. Click in box to type your question
6. Click in box to type the correct answer
7. Go back to step 3 to add additional questions. When finished click Save to save changes



5.5.6 Poll and Quiz Settings

1. Click the settings icon
2. Click to edit Poll/Quiz title
3. Option to present questions in the order they were created or to randomise questions
4. Set Status. Published will set the Poll/Quiz live. Draft will stop to Poll/Quiz from being seen by learner.
5. Assign Poll/Quiz to groups
6. Click Save to save changes

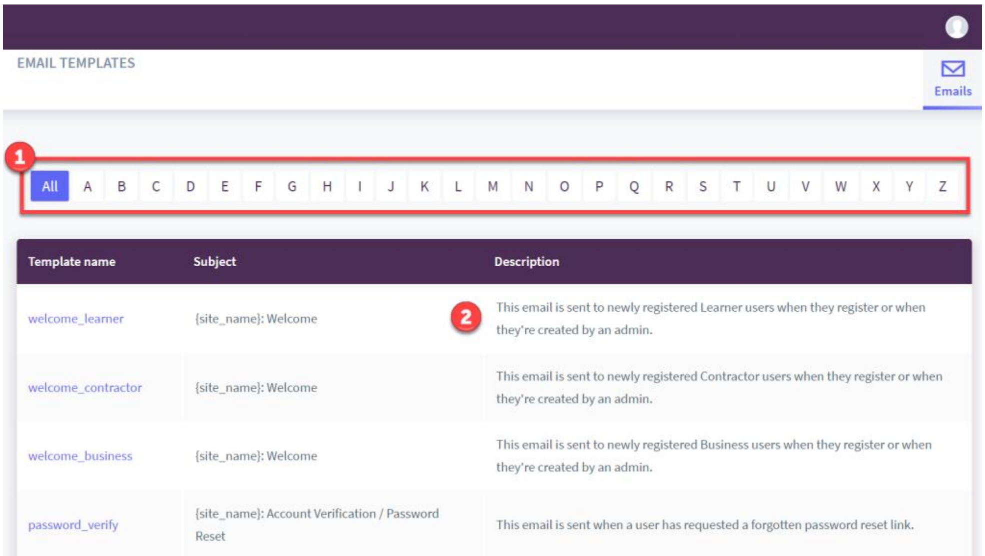


6. Administration

6.1 Email Templates

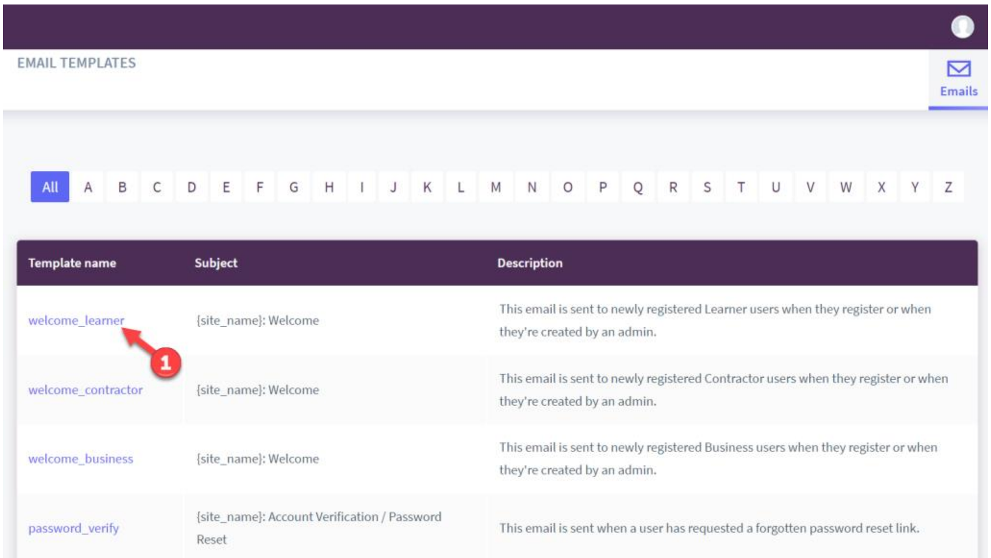
Email templates are pre-created emails that the platform automatically sends once an action has been triggered. For example, send a welcome email to a new user. All templates can be edited if you need to change the wording.

1. Click on a letter to only display the templates names starting with that letter
2. The description field describes what the template is used for

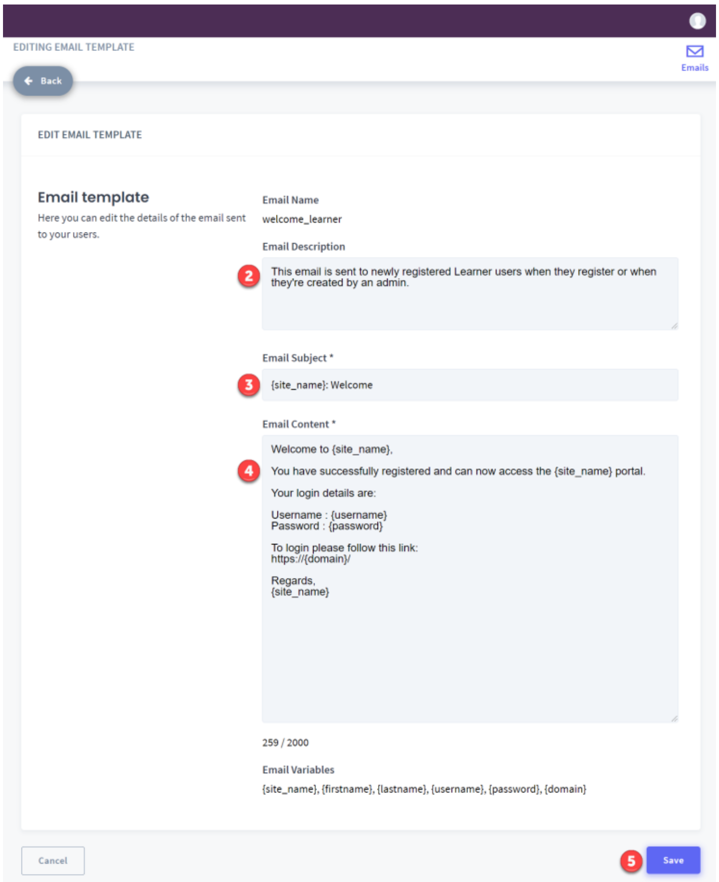


6.1.1 Editing an email template

1. Click on the template name



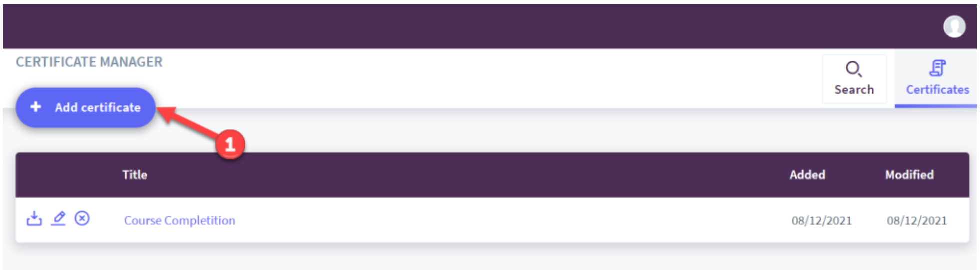
2. Only administrators can view the email description. **It is advised that this text isn't changed**
3. Only edit the email subject text. **Don't edit the code, which is anything in brackets or directly after the brackets {} for example {site_name}:**
4. Only edit the email content text. **Don't edit the code, which is anything in brackets or directly after brackets {} for example** {password}
5. Click Save to save changes



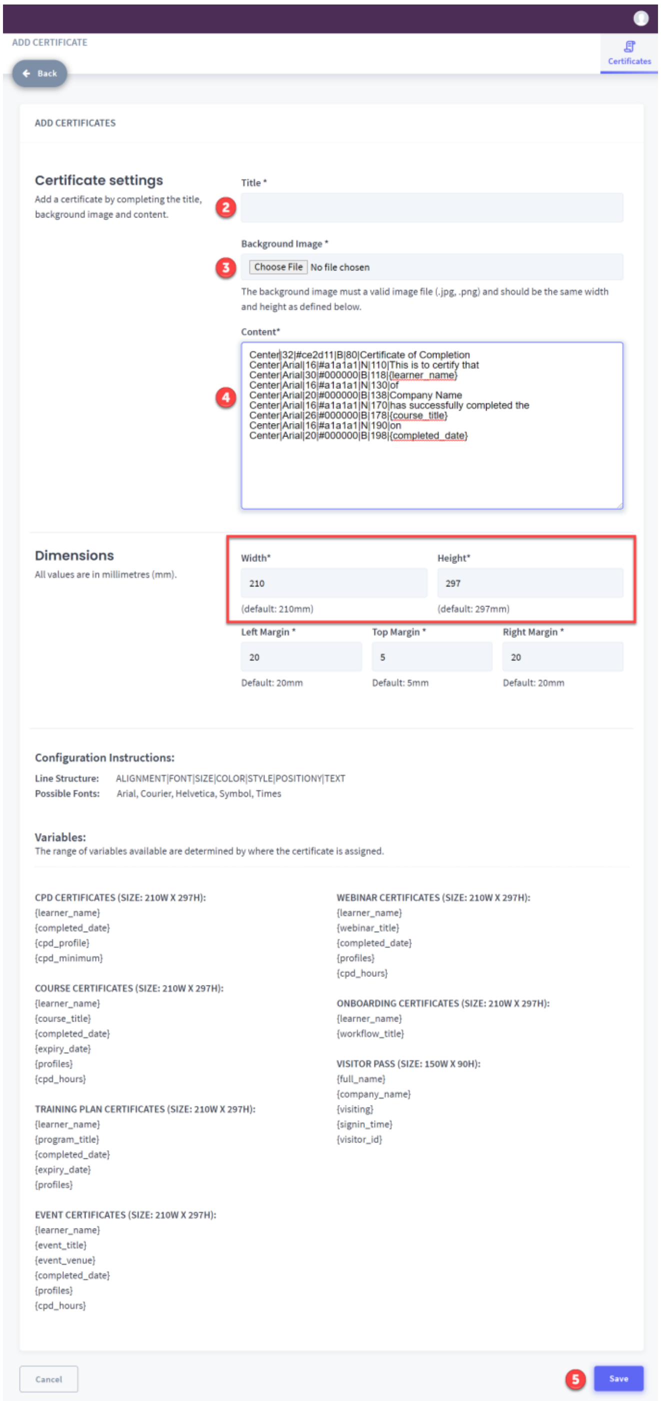
6.2 Certificate Manager

The Certificate Manager allows you to create your own custom certificates. These can then be assigned to courses, events, and webinars.

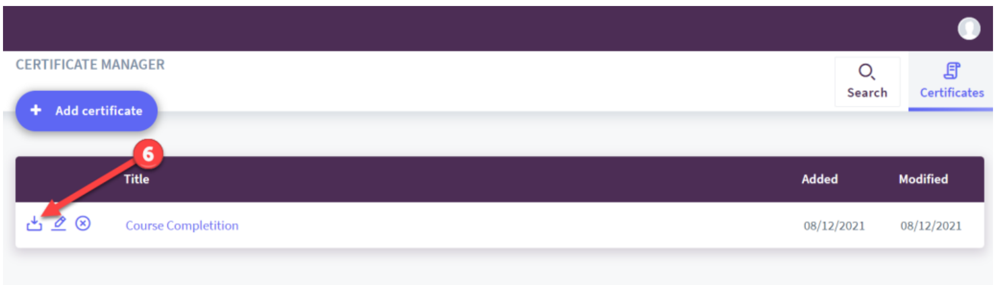
1. Click add certificate



2. Add a title
3. Click choose file to upload a background image from your hard drive. The background image must be a valid image file (.jpg, .png) and should be the same width and height as defined in the red box below
4. Edit the certificate content (intermediate to advance options)
    - Text - edit text, for example, This is to certify that
    - Font - change the font name between the brackets |Arial|
    - Size - change the font number between the brackets |16|
    - Colour - change the Hex code between brackets |#a1a1a1|
5. Click Save to save changes



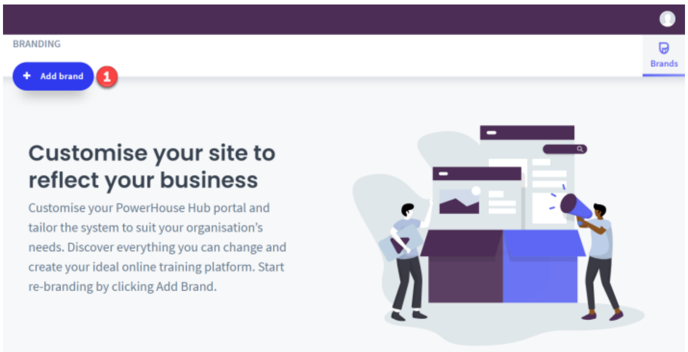
6. Click the download button to view your certificate



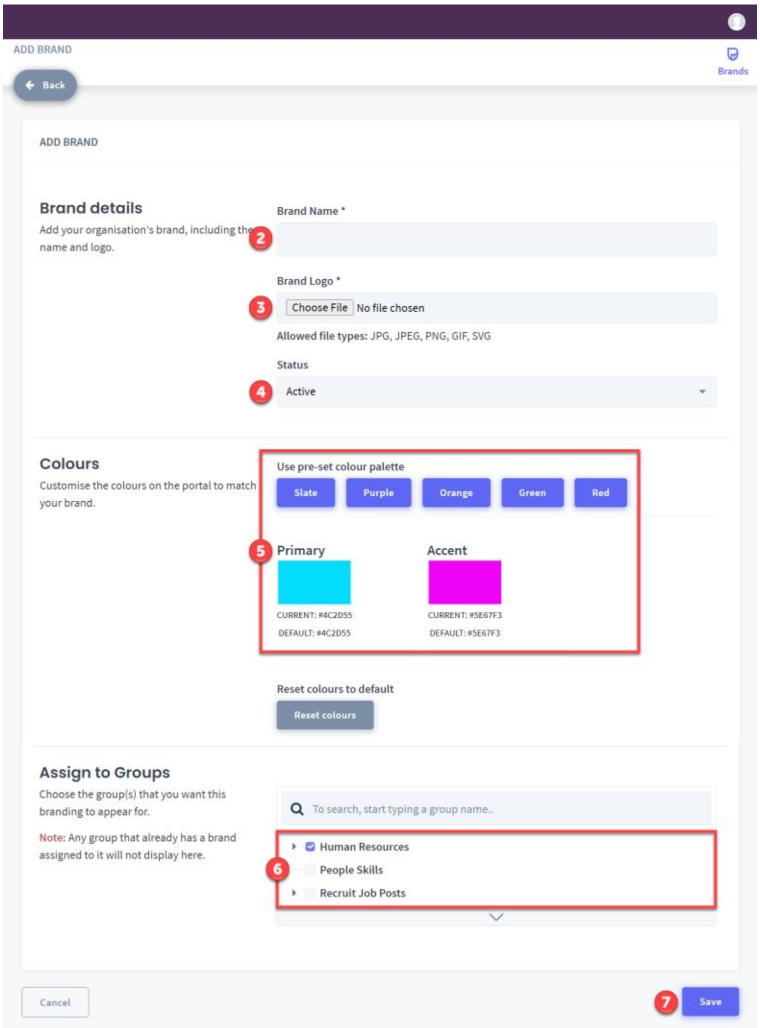
6.3 Group Branding

The branding module allows you to assign a different logo and colour scheme that can be assigned to a specific group

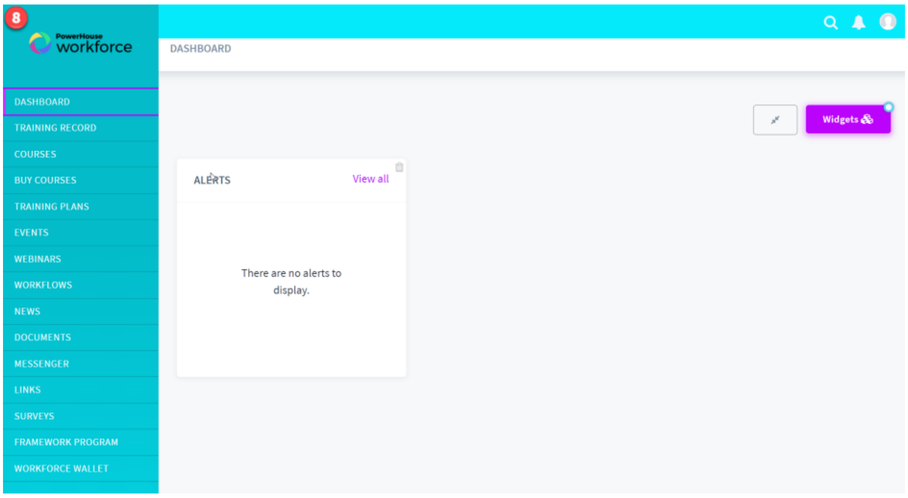
1. Click add brand



2. Add a brand name
3. Click choose file to upload a brand logo from your hard drive
4. Set Status. Active is live. Disabled means the brand wont be seen by the users
5. Select colour scheme by using the pre-set colour palette or by click in the primary / accent colour box.
6. Assign the logo and colour scheme to a group(s)
7. Click Save to save changes



8. When logging in as a member of the Human Resources group, you will see that the logo and colour scheme has changed.



6.4 Visitor Manager

The Visitor Manager module allows you to create temporary account for users who require site-specific induction courses.

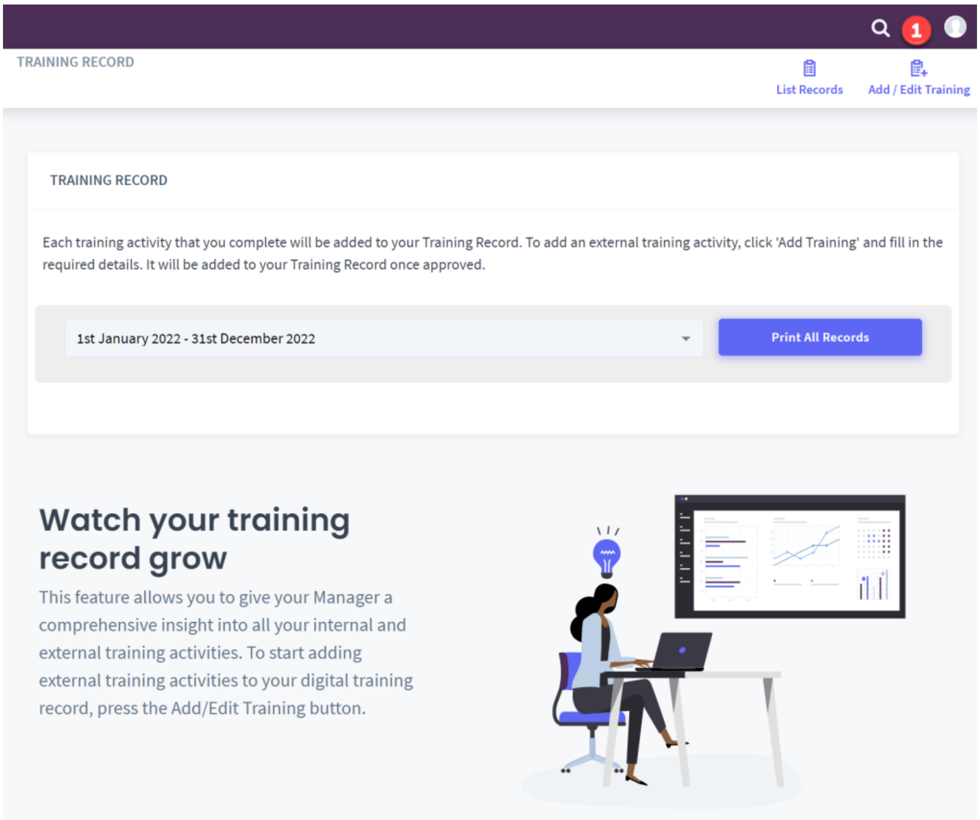
6.5 Training Records

This feature allows admins to have a comprehensive insight into all users' external training activities. Once the worker has imported external training records, the admin can view and accept or decline external training records.

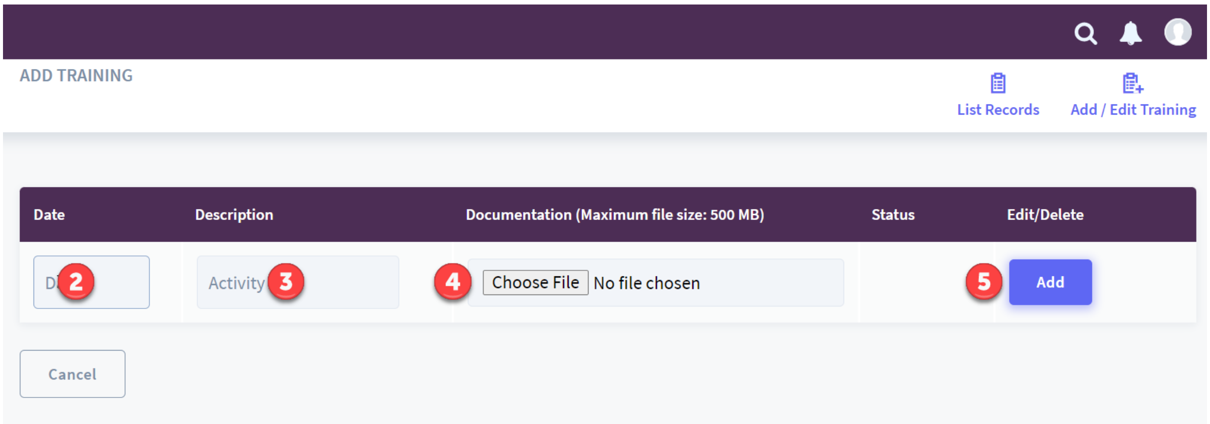
6.5.1 Adding an external training course for review

Workers can add external training certificates to their Training Record by:

1. Click add / edit training

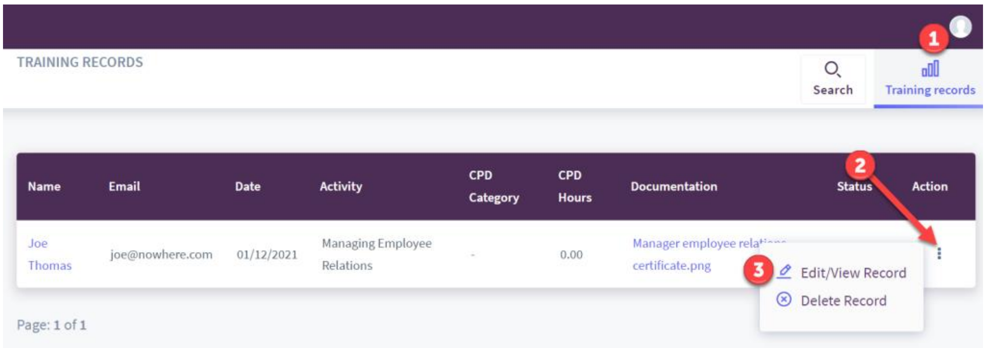


2. Edit the date when the training was completed
3. Enter the training name
4. Upload a document relevant to the training. This field is mandatory
5. Click add

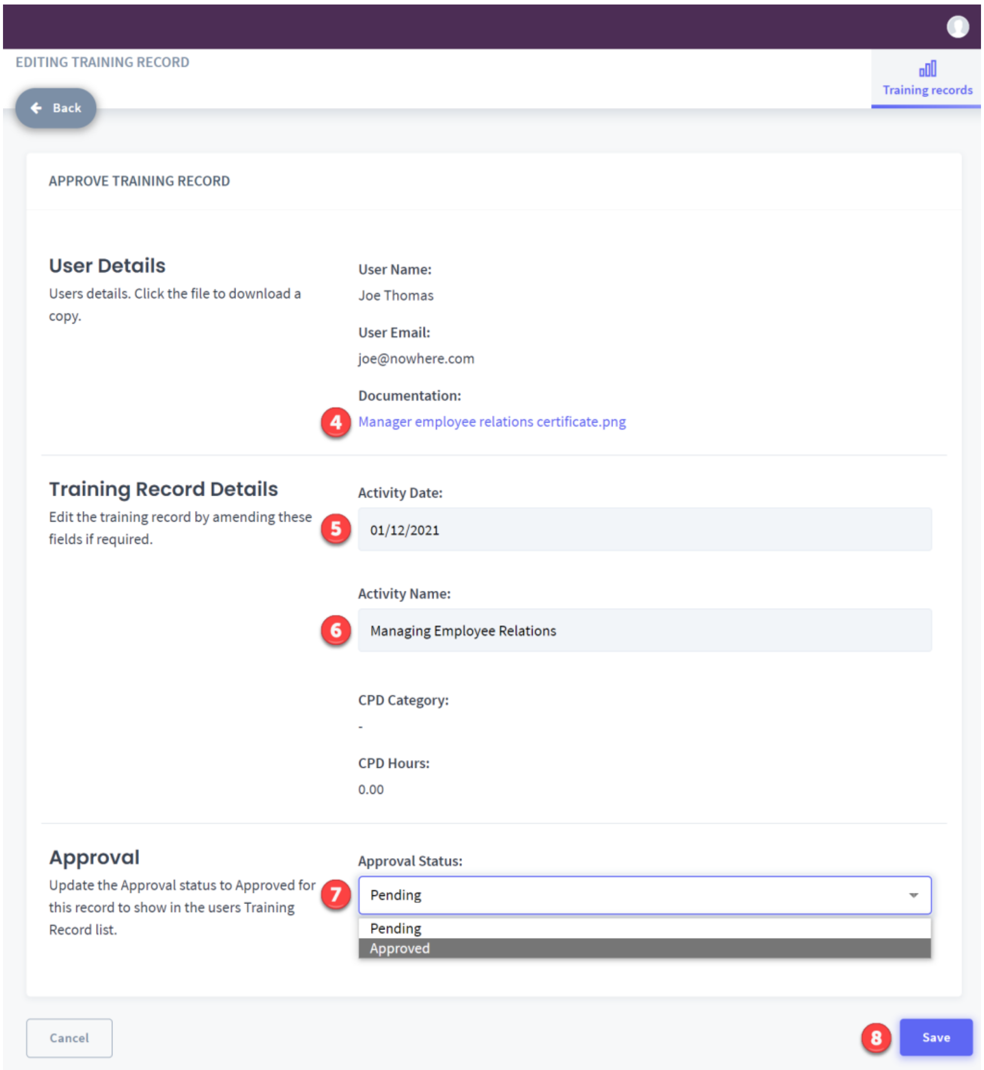


6.5.2 Accepting Training Records

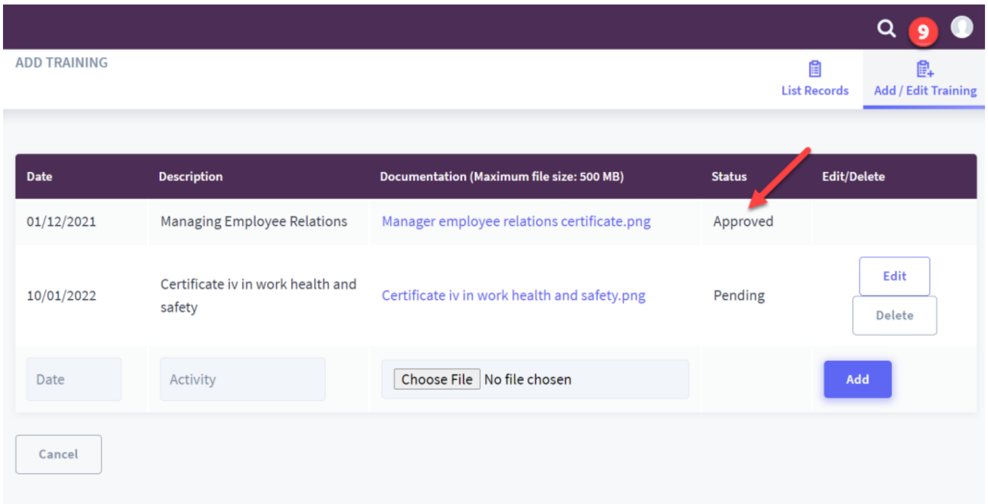
1. Click Training records
2. Click on the hamburger icon
3. Click edit / view record



4. Click link to download documentation for review
5. Ability to edit the activity date by clicking in the text box
6. Ability to edit the activity name by clicking in the text box
7. To approve the training record, click in the drop down box and select approved
8. Click Save to save changes

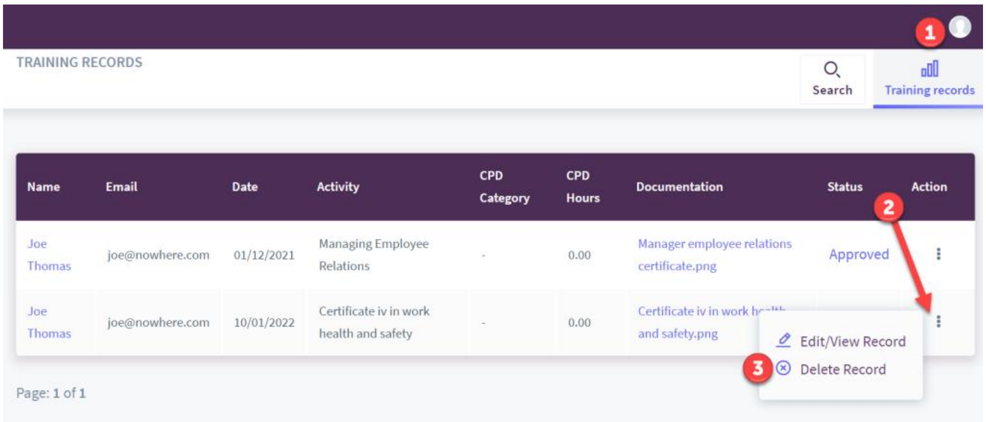


9. When the worker clicks add / edit training they can see that there training record has been approved



6.5.3 Delete a Training record

1. Click Training Records
2. Click the hamburger icon
3. Click delete record. The Training Record will now be deleted from the learners portal



6.6 User accounts

This feature allows you to create various user access levels. You have the option to create learners/workers, managers, businesses, and administrator accounts.

It's important that you understand the hierarchy order of user types and what access they have on the platform. You can also change the name of the User Accounts to suit your business acronyms.

Administrator

Administrators have the highest level of access on the Platform. Administrators can grant permissions to other users on the Platform and edit any fields required. As an administrator you can also restrict other users accessibility across all module functions so they can only access what you want them to.

Manager

Managers are assigned based on the group structure, which is important when managers are seeking to run reporting on certain content. Based on the group structure Managers are assigned to; they have authorisation to oversee all Learner and Candidate users and are responsible for all management of those users.

Employee/Learner

Learners strictly use the platform to complete set tasks/courses/events/workflows etc. which build into their workforce wallet to compile a detailed overview of their professional profile and development. Learners, just like Managers are assigned to a group structure so reporting and delegation of tasks are distributed correctly under each group.

Candidate

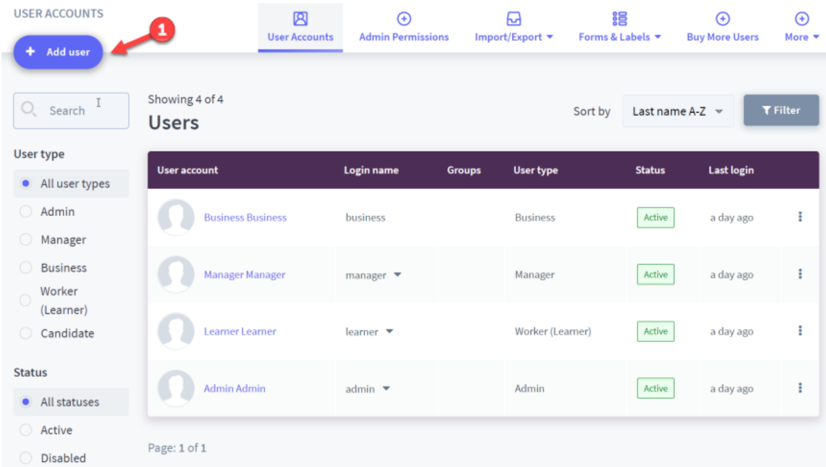
A Candidate user is only created automatically when they apply for a job within the Recruitment Service Module and are in the phase of being screened for suitability by Management. Once successful; this Candidate User is transitioned automatically into a Learner User License.

User Creation Tip

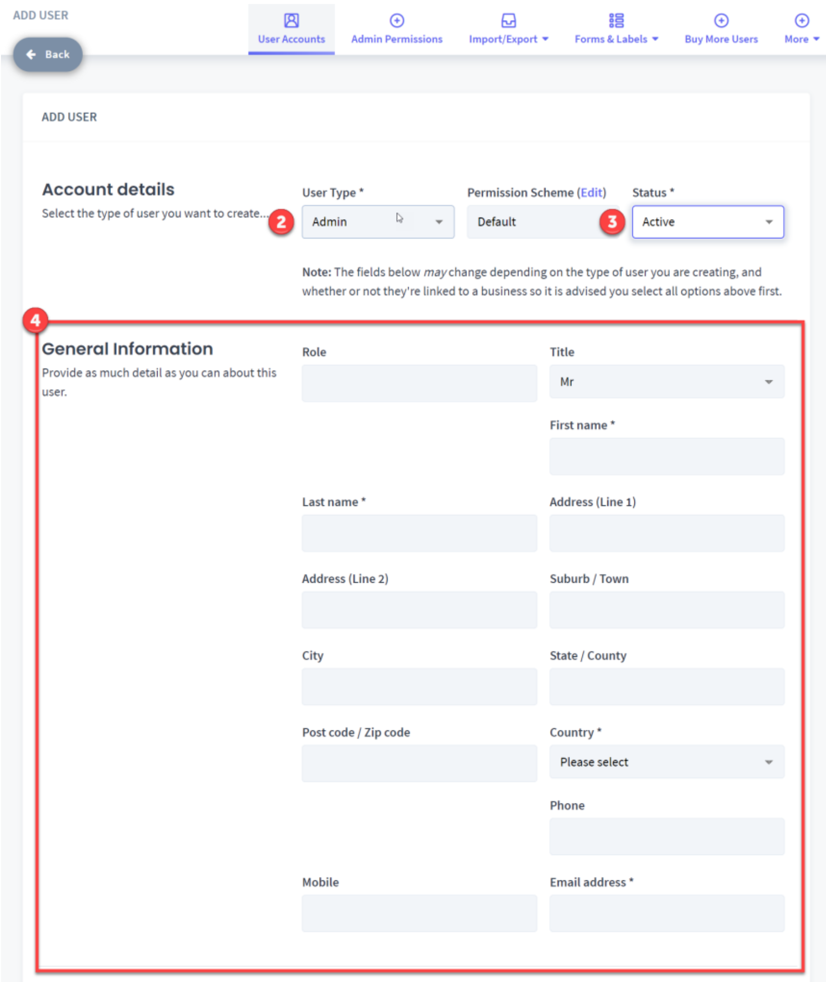
For bulk upload of user types this can be done by ensuring all relative fields are replicated and pre-filled in a csv spreadsheet ready for upload. If you are choosing to bulk upload 20 x Users or more, you are permitted to send the spreadsheet to our Support Team for uploading.

6.6.1 Add a User Accounts

1. Click Add User

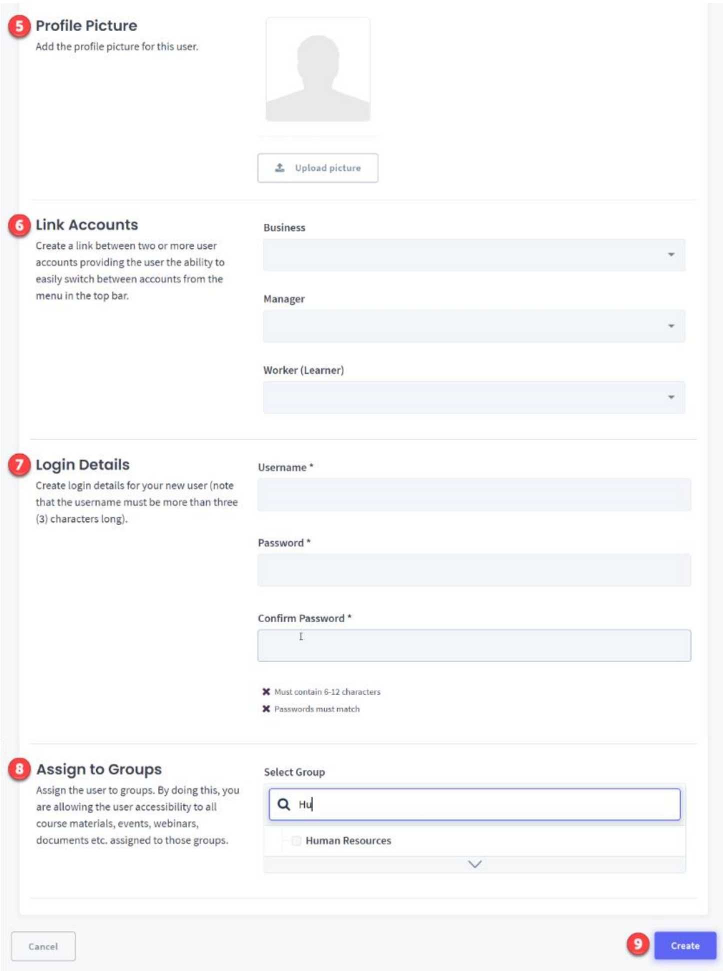


2. Select User Type (Worker (Learner), Manager, Business or Admin). The below screen shot shows required information when creating an amin account
3. Select Status. Active: the user can access the platform. Disabled: The account is not yet live
4. Complete General Information (this will change when a different User Type is selected).



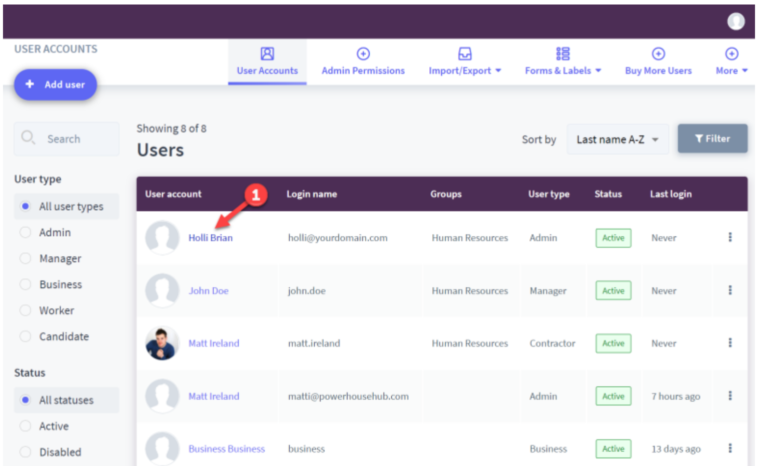
5. You have the option to upload a profile picture

6. Create a link between two or more user accounts providing the user the ability to easily switch between accounts from the menu in the top bar
7. Create login details for your new user (note that the password must be more than 6-12 characters
8. Assign the user to groups. By doing this, you are allowing the user accessibility to all course materials, events, webinars, documents etc. assigned to those groups
9. Click create

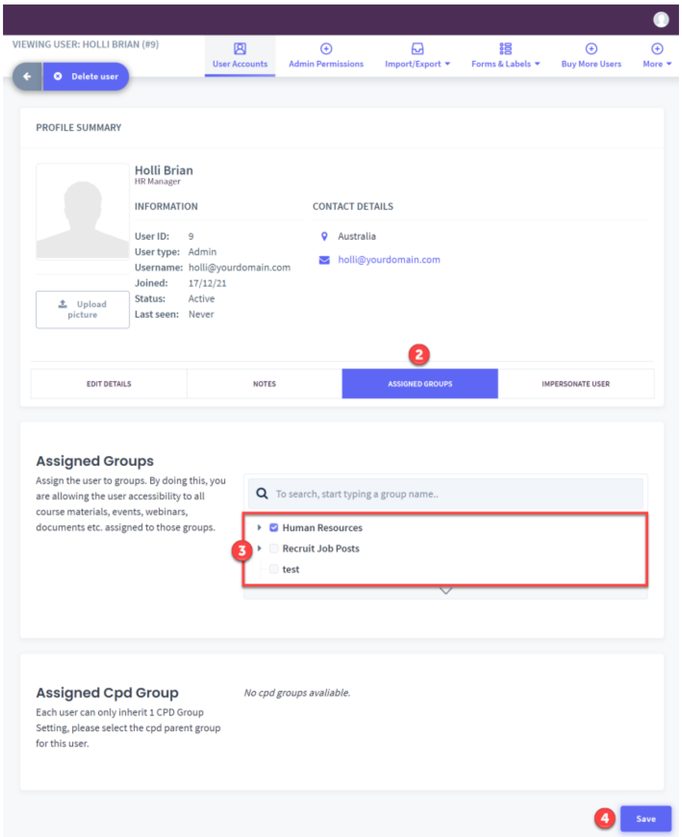


6.6.2 Assigning user groups

1. Click on a user from the User Accounts page

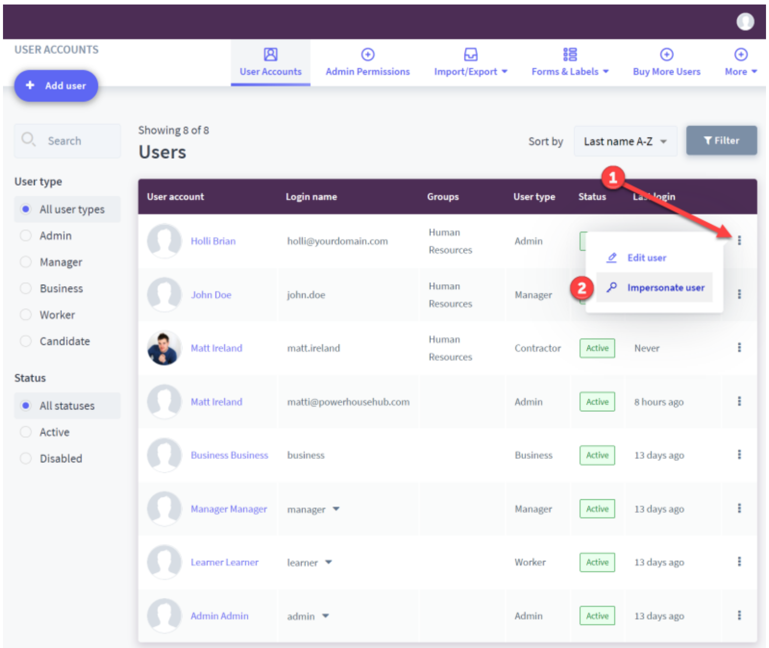


2. Click Assigned Groups within the Profile Summary.
3. Select the relevant groups/subgroups you wish to assign or unassign to the user. By assigning groups to your user account, you are giving the user access to all courses, news, webinars, documentation, and events within that group.
4. Click Save to save changes



6.6.3 Impersonate User

1. Click on the hamburger icon next to the user that you want to impersonate
2. Click Impersonate user



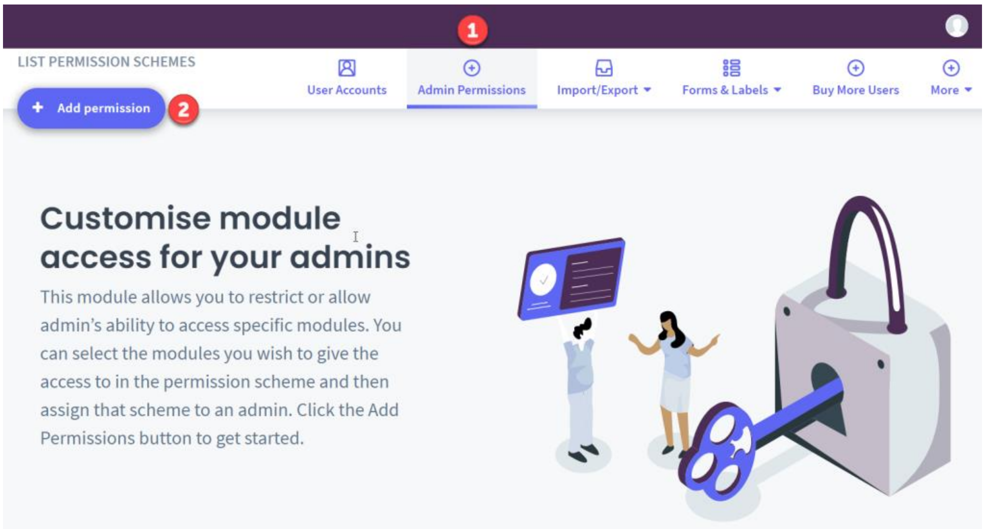
A new window will appear and allow you to navigate the platform and see exactly what that user will see. This can be used to test any settings made to the account or help problem solve if a user is having issues with the platform.

6.6.4 Admin Permissions

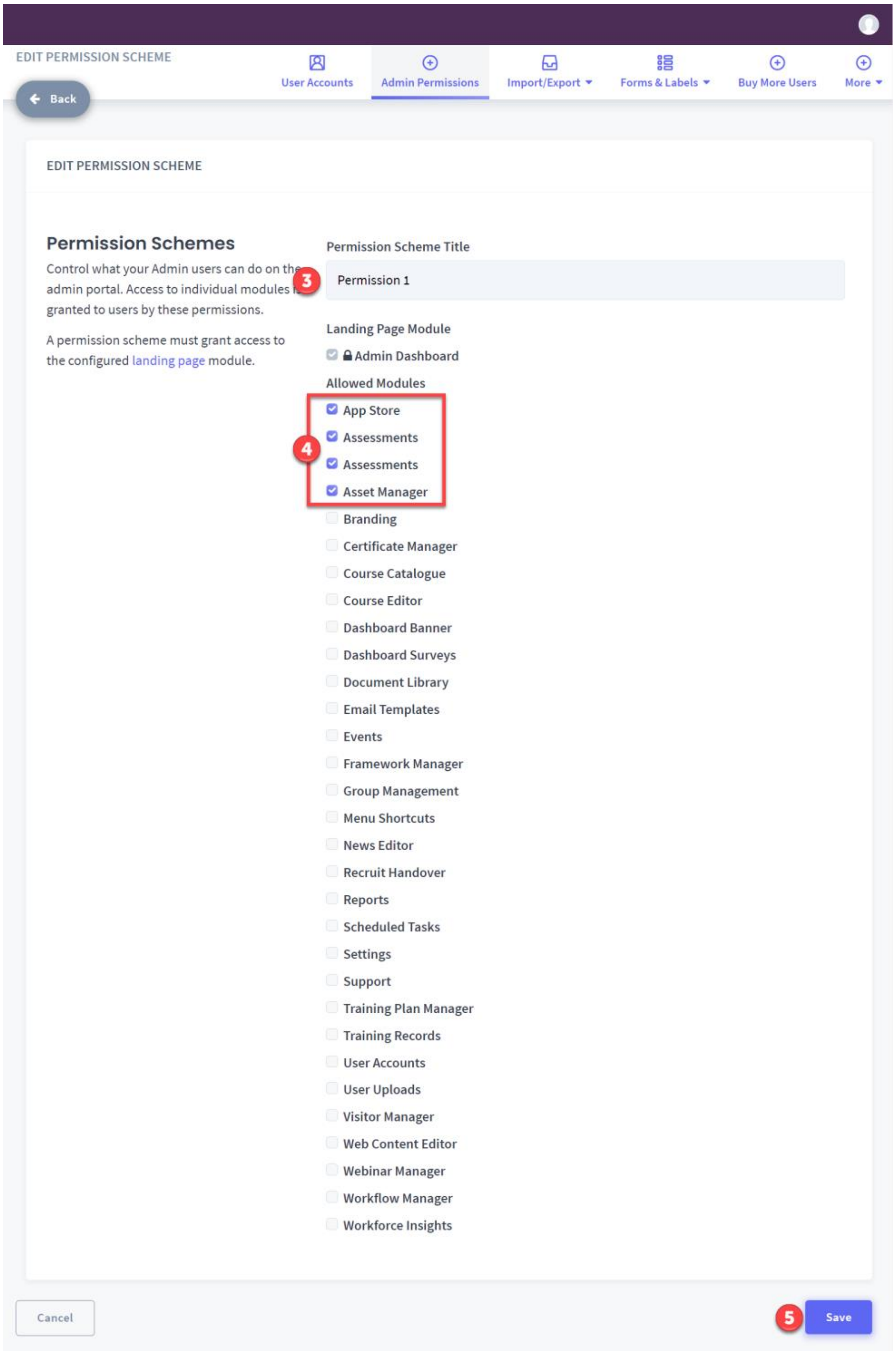
This module allows you to restrict or allow admin's ability to access specific modules in the left hand navigation. You can select the modules you wish to give the access to in the permission scheme and then assign that scheme to an admin.

Click the Add Permissions button to get started

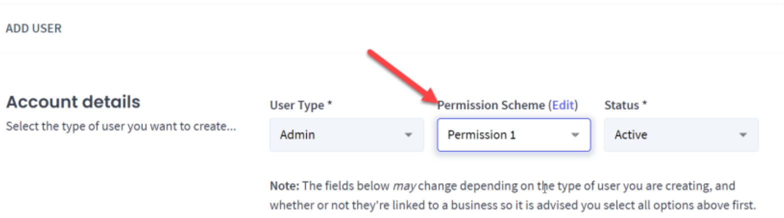
1. Click the Admin Permissions tab
2. Click Add permission



3. Add permission scheme title
4. Select relevant the modules that this setting allows
5. Click Save



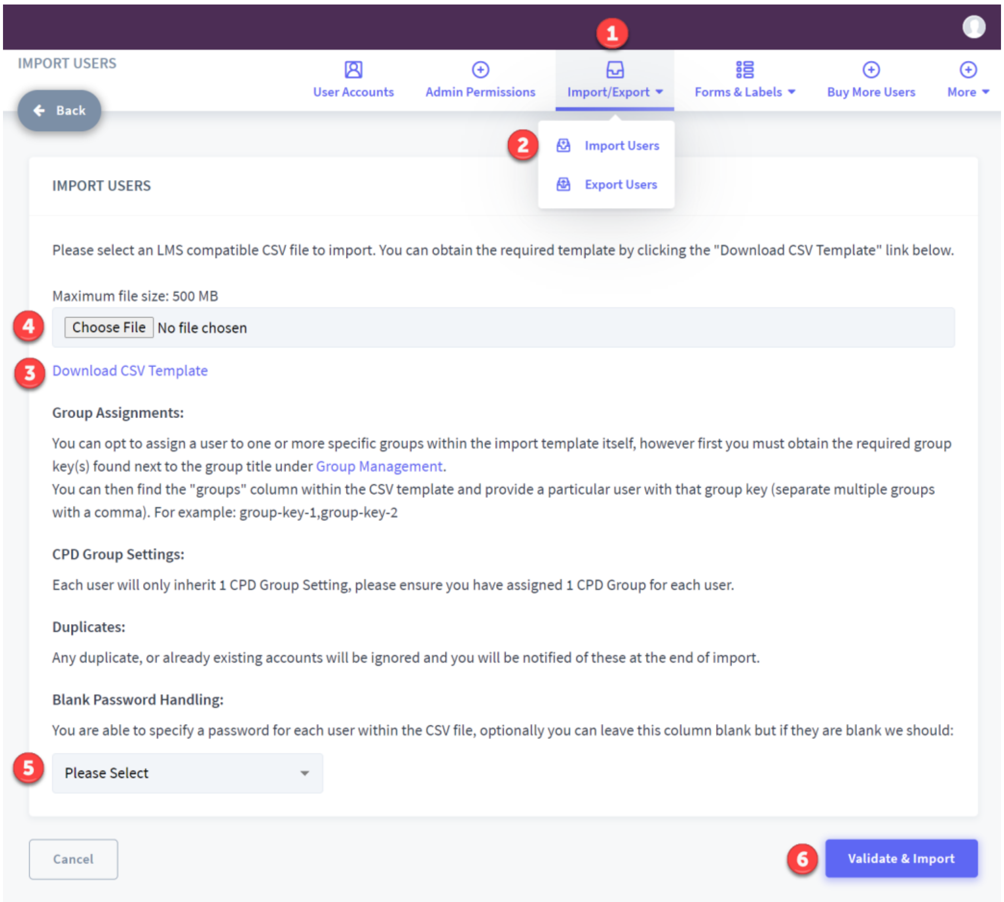
The permission scheme you just created can be assigned when adding an admin user type (shown in image below).



6.6.5 Import Users

You can import bulk users onto the platform by uploading a CSV compatible file. This is suggested when you are adding 20+ Users or more.

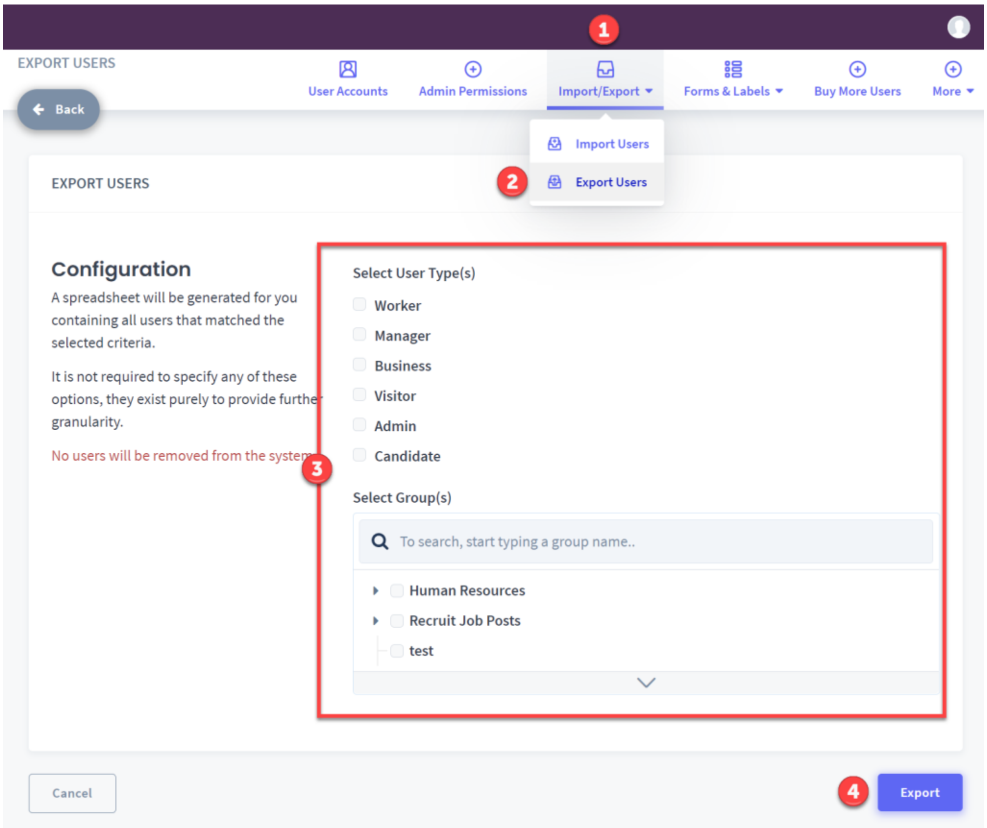
1. Click Import/Export dropdown box in the top menu panel
2. Click Import Users
3. Download CSV Template and fill out the form with all user information
4. Upload completed CSV
5. If you haven't added a password for each user in the CSV, please select an option from the drop down box
6. Click Validate & Import



6.6.6 Export Users

A spreadsheet will be generated for you containing all users that match the selected criteria. It is not required to specify any of these options, they exist purely to provide further granularity.

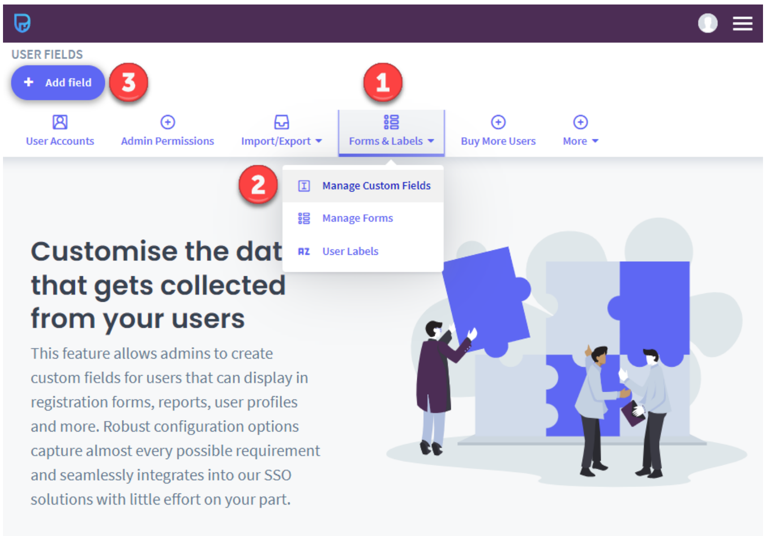
1. Click Import/Export
2. Click Export Users from the dropdown box
3. Select the relevant user type(s) and group(s) that they are associated to
4. Click Export



6.6.7 Manage Custom Fields

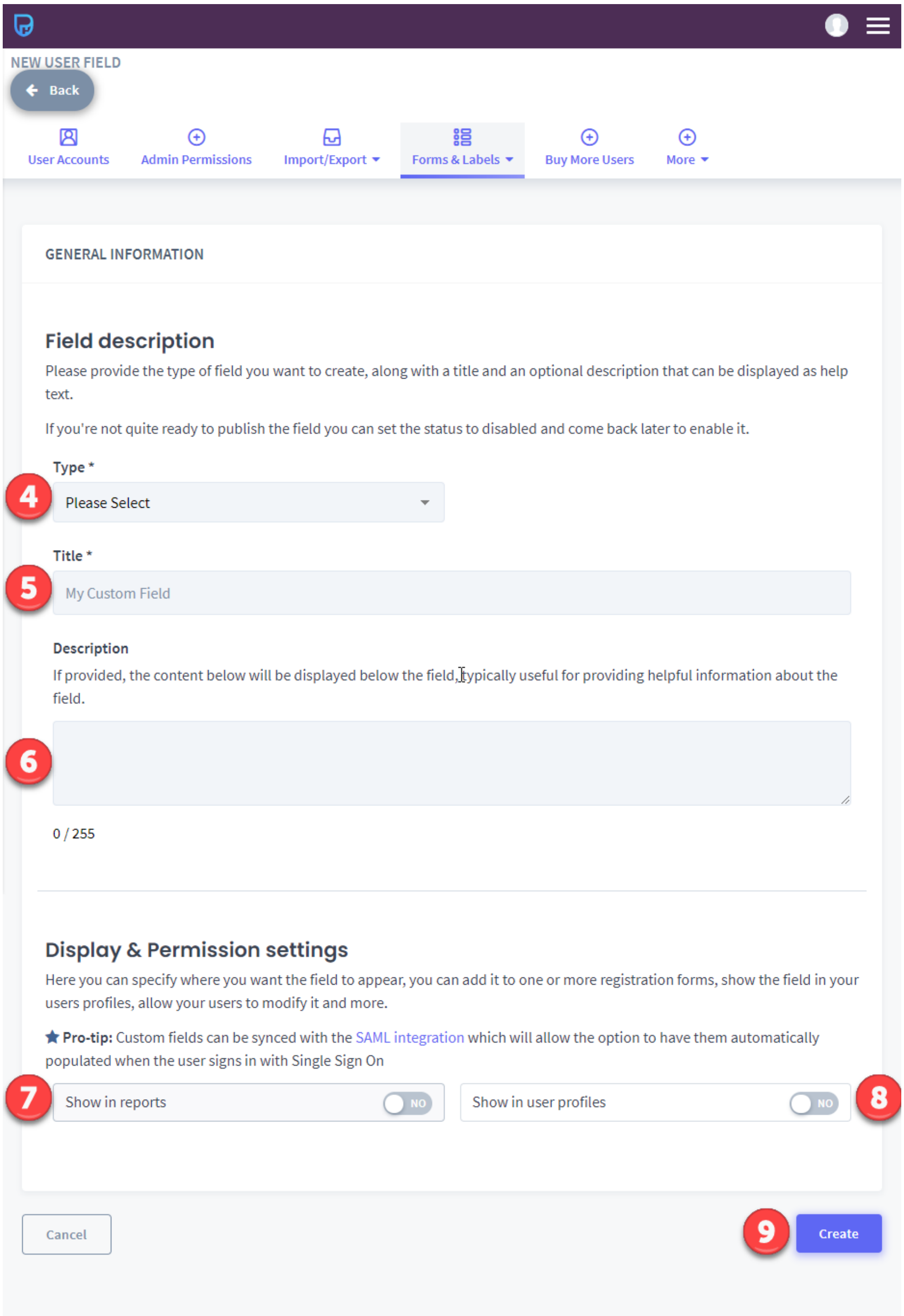
This feature allows admins to create custom fields for users that can display in registration forms, reports, user profiles and more. Robust configuration options capture almost every possible requirement and seamlessly integrates into our SSO solutions with little effort on your part

1. Click Forms & Labels
2. Click Manage Custom Fields from the dropdown box
3. Select Add Field



4. Select the type of field you want to create
5. Give the field a name
6. Add a description
7. Toggle Yes if you would like the fields to be included in reports that are created

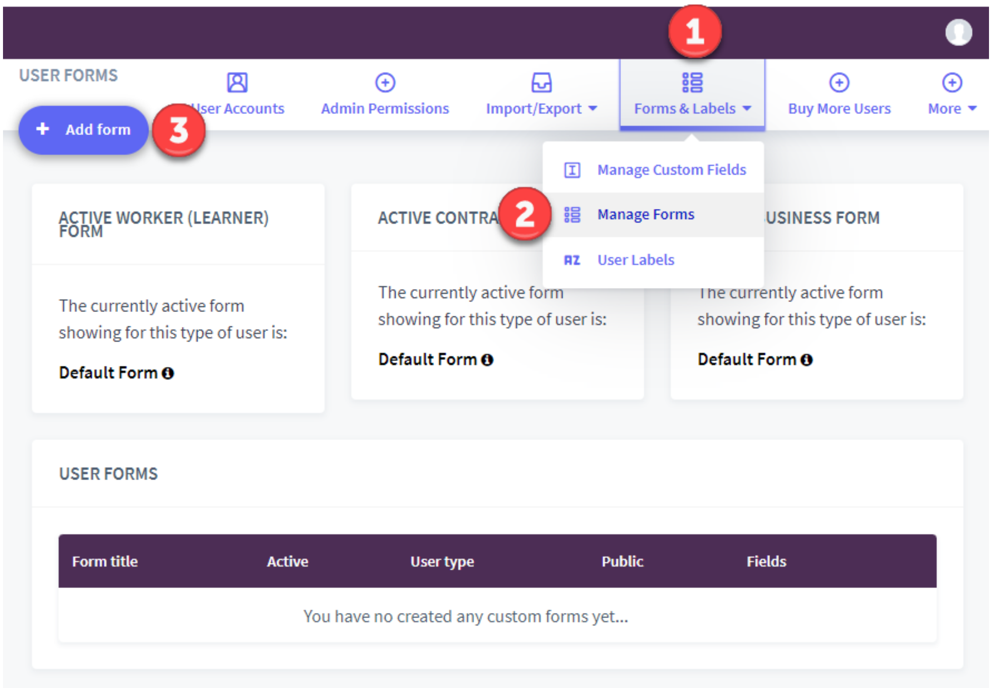
8. Toggle Yes if you would like learners to complete the user fields under Edit Profile where they can complete these manually
9. Click Create



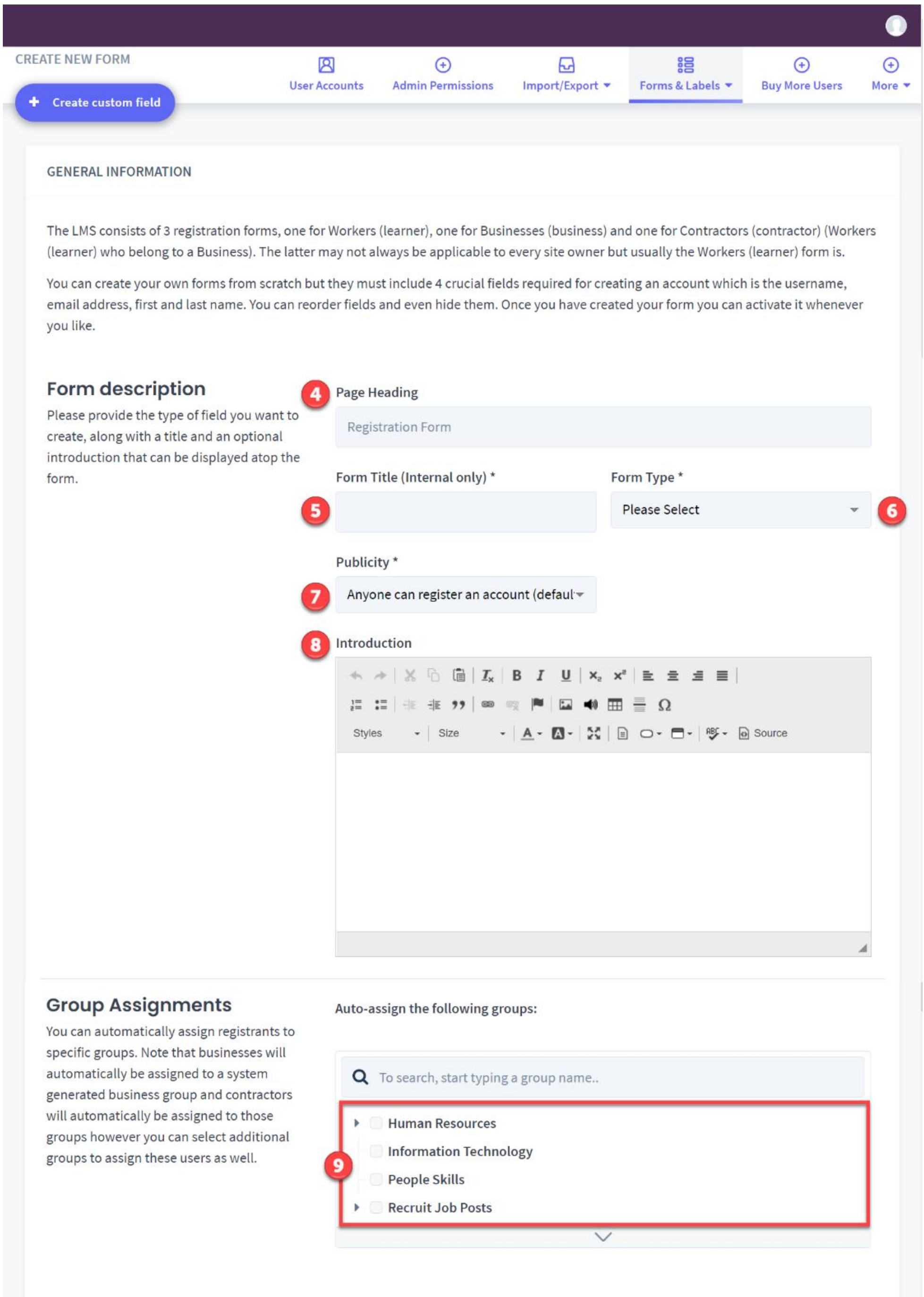
6.6.8 Manage Forms

After User Fields are created, you can now build a custom form for your users to fill out. There are 3 Active forms to create for learners, contractors, and business users.

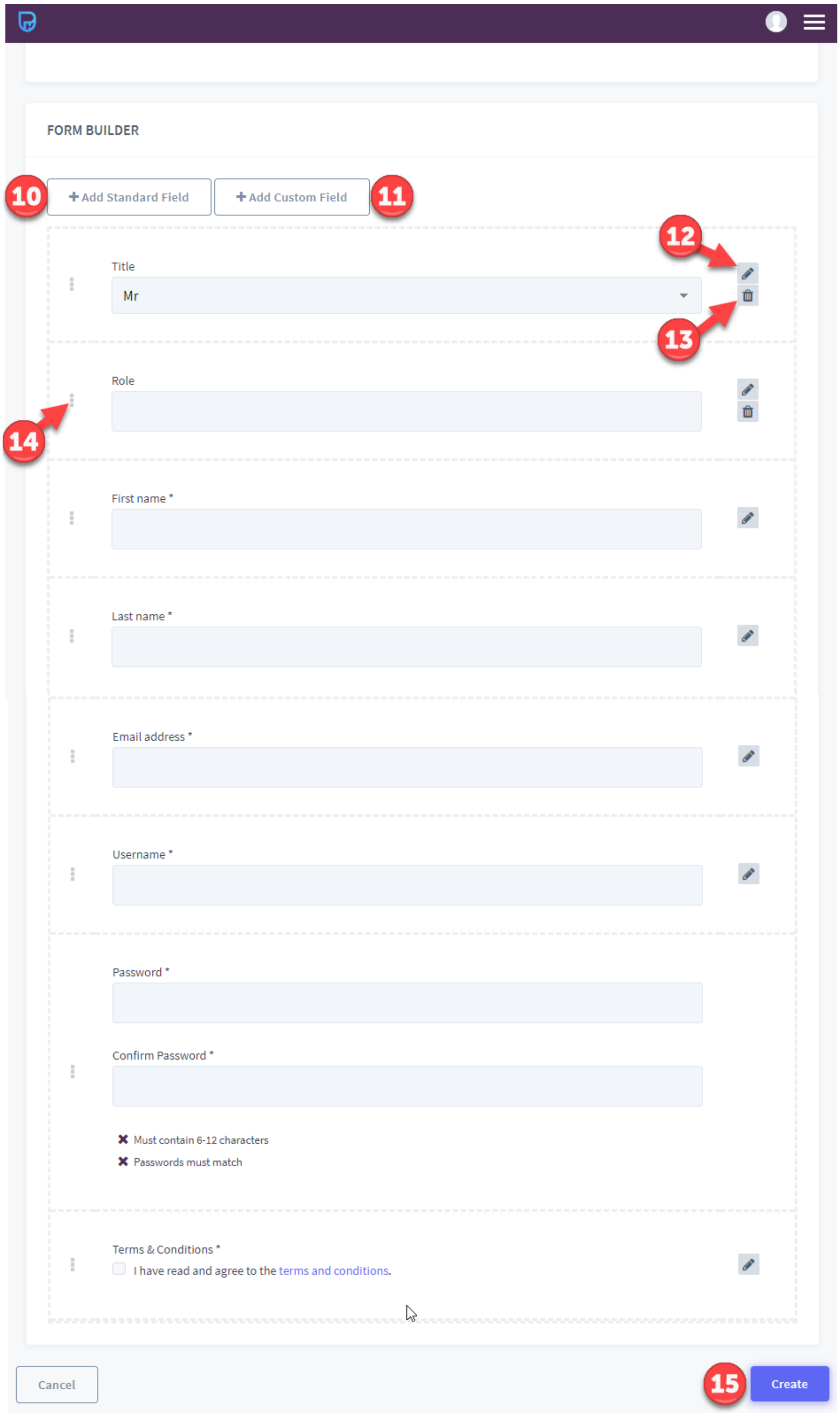
1. Click Forms & Labels
2. Click Manage Forms
3. Click Add form



4. Add a page heading
5. Add a form title
6. Select the form type. Choose from Worker, Contractor, Business
7. Select Publicity option from the drop down box
8. Add an introduction
9. Assign the registrants to specific groups



10. Click Add Standard Field to add a default field to your form
11. Click Add Custom Field to add or create a custom field to your form
12. Click Rename to change name of field
13. Click Remove field to delete field from the form
14. Click and hold the hamburger icon to re-order the fields
15. Click Create once the form is complete

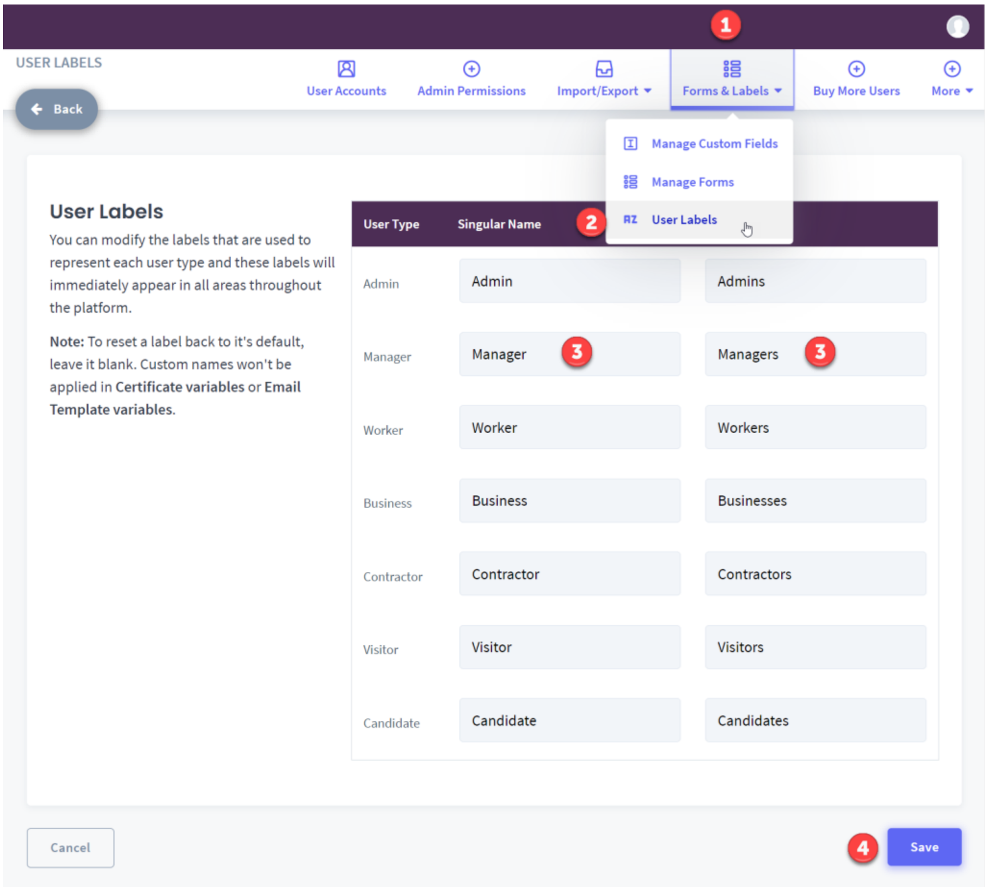


6.6.9 User Labels

You can modify the labels that are used to represent each user type and these labels will immediately appear in all areas throughout the platform.

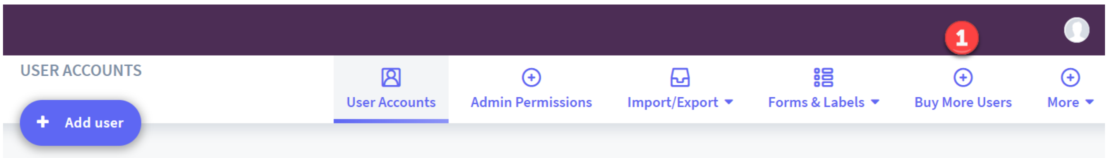
Note: To reset a label back to it's default, leave it blank. Custom names won't be applied in Certificate variables or Email Template variables.

1. Click Forms & Labels dropdown box in the top menu panel
2. Click User Labels
3. If You would like to change the user type label, click in Singular name / Plural name field, delete current name and re type desired name.
4. Click Save to save changes

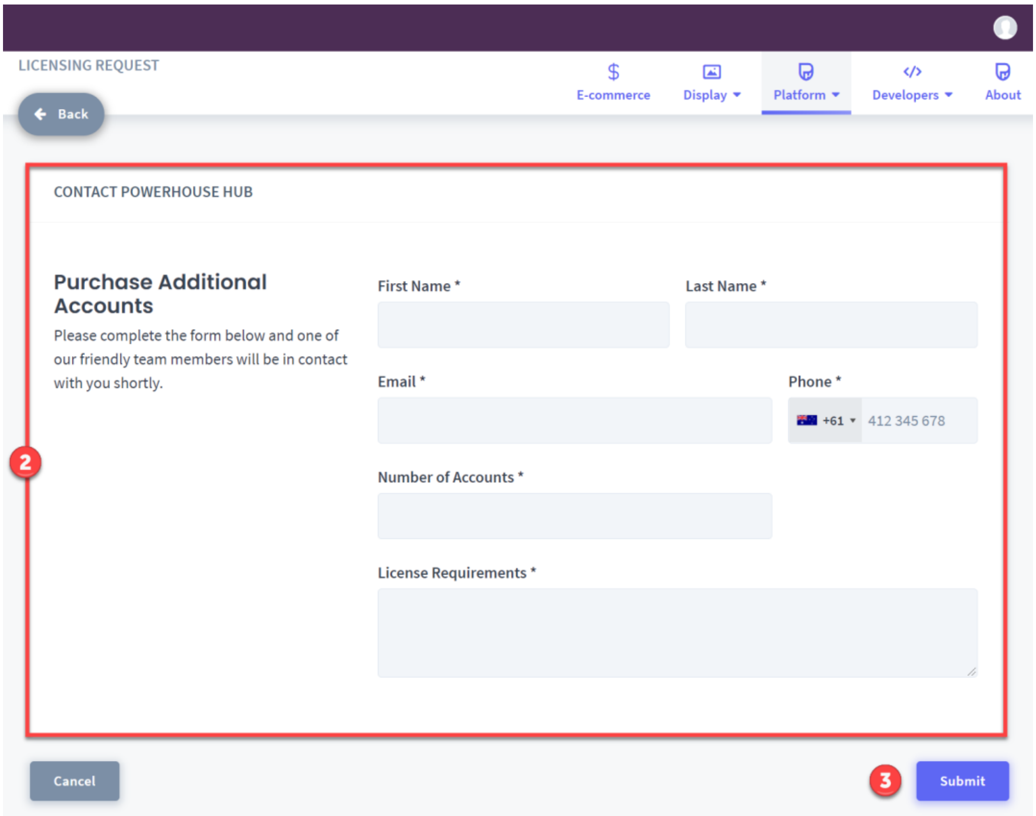


6.6.10 Buy More Users

1. Click Buy More Users

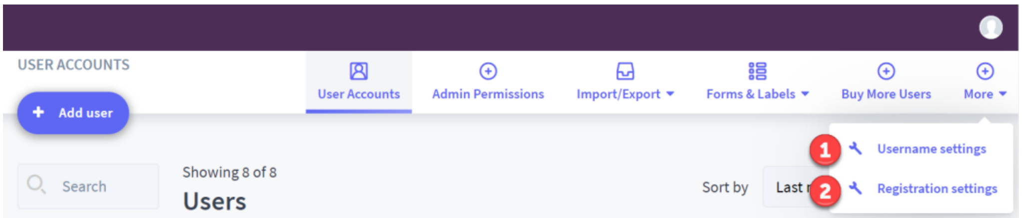


2. Fill out the form
3. Click Submit and one of our friendly team members will be in contact with you shortly



6.6.11 More

1. Username setting will take you to System
2. Registration setting will take you to System

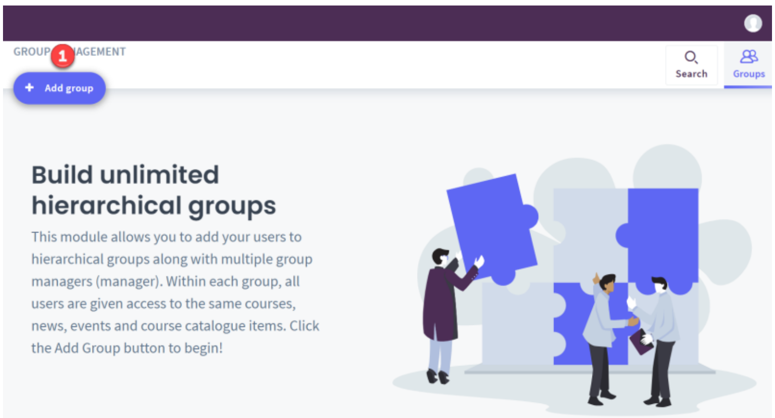


6.7 Group Management

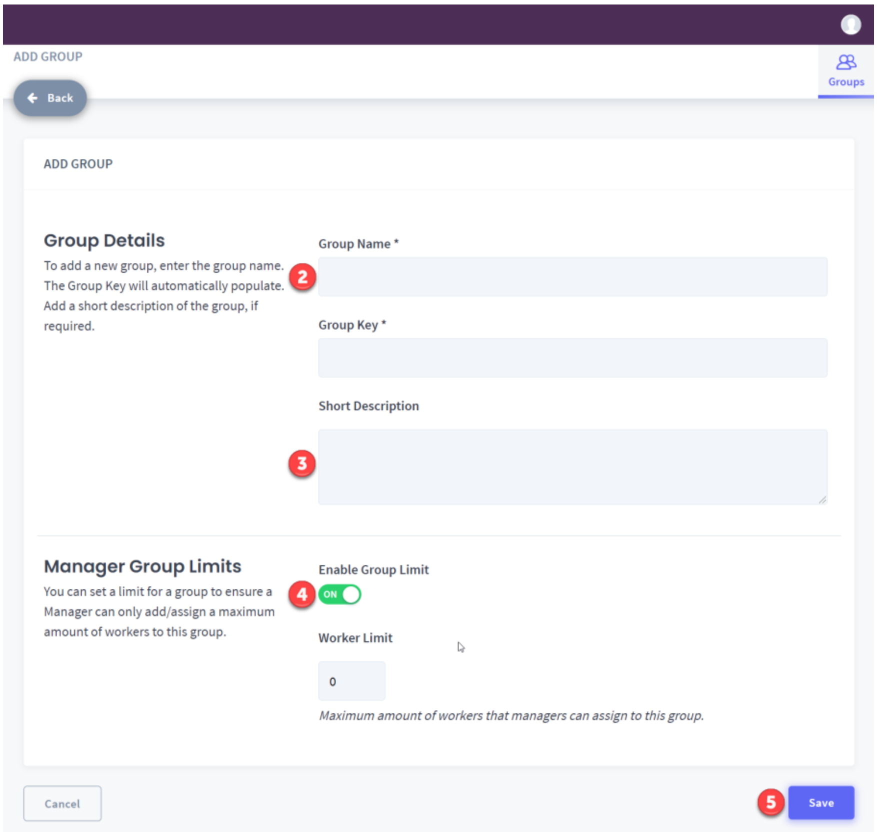
This module allows you to add your users to hierarchical groups along with multiple group managers (manager). Within each group, all users are given access to the same courses, news, events and course catalogue items.

6.7.1 Adding a group

1. Click add group

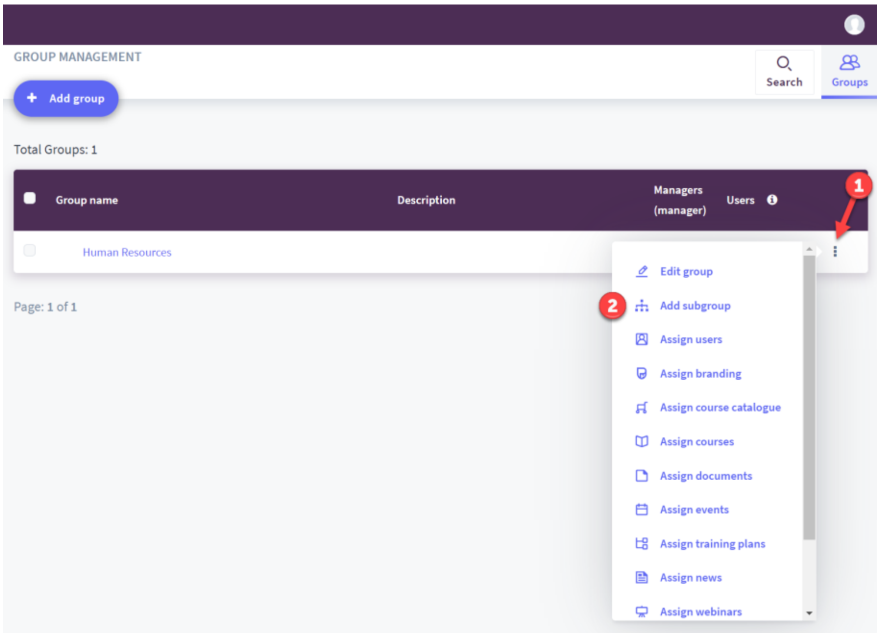


2. Add a group name and the group key will automatically populate
3. Add a short description. This is only visible to admins
4. Toggle ON to enable a group limit and then enter the maximum amount of workers that managers can assign to the group
5. Click Save to save changes



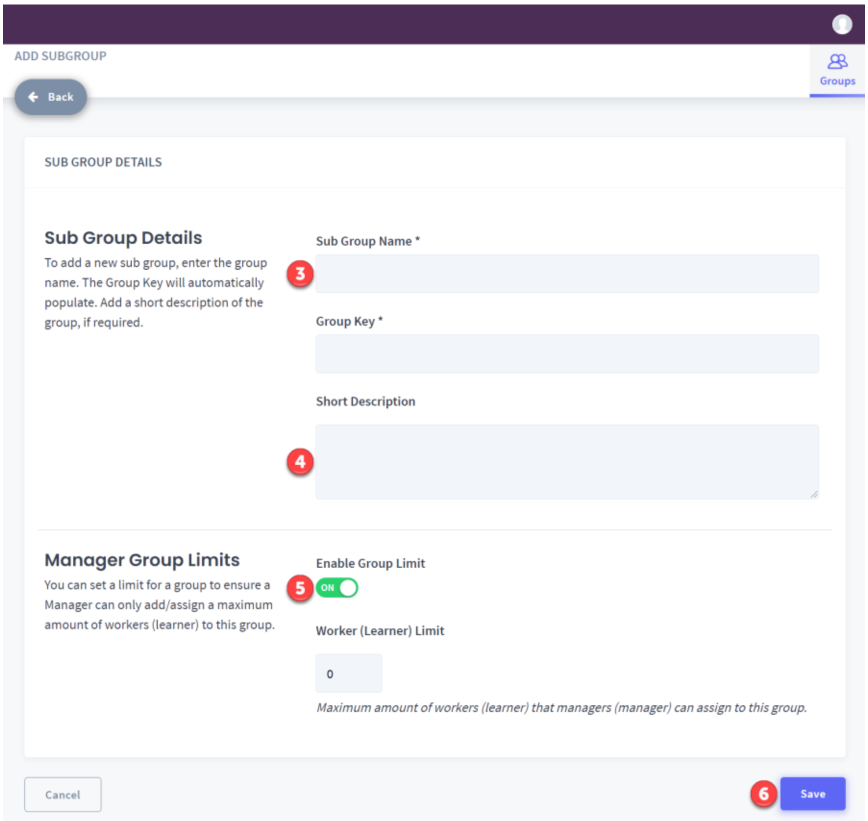
6.7.2 Adding a Subgroup

1. Click the hamburger icon
2. Click add subgroup



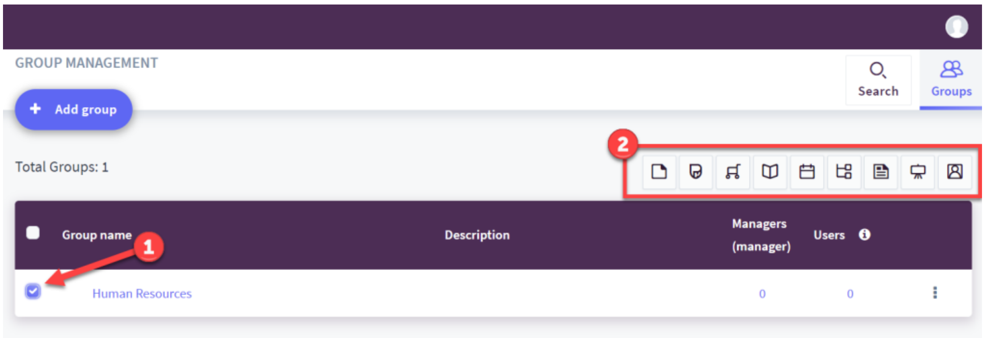
3. Add a short description. This is only visible to admins

4. Add a short description. Only the admins can see this
5. Toggle ON to enable a group limit and then enter the maximum amount of workers that managers can assign to the group
6. Click Save to save changes



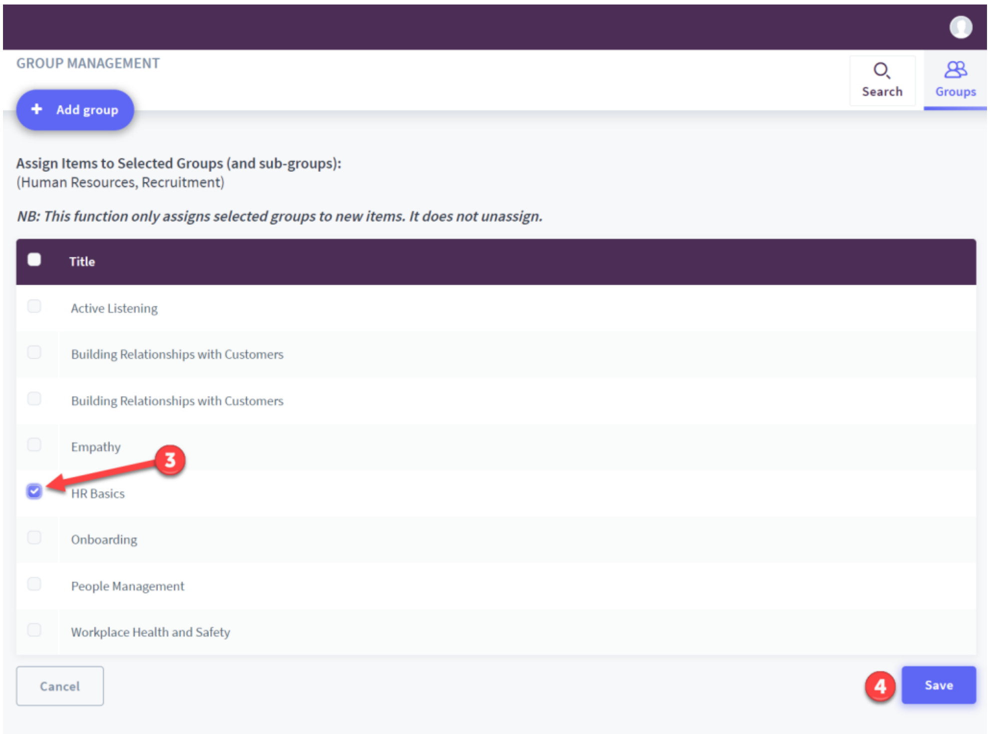
6.7.3 Assigning assets to groups

1. Select the group that you want to assign an asset to
2. Select the required asset. Options include:
    - Assign Documents
    - Assign Branding
    - Assign Course Cart
    - Assign Courses
    - Assign Events
    - Assign Training Plans
    - Assign News
    - Assign a Webinar
    - Assign Users



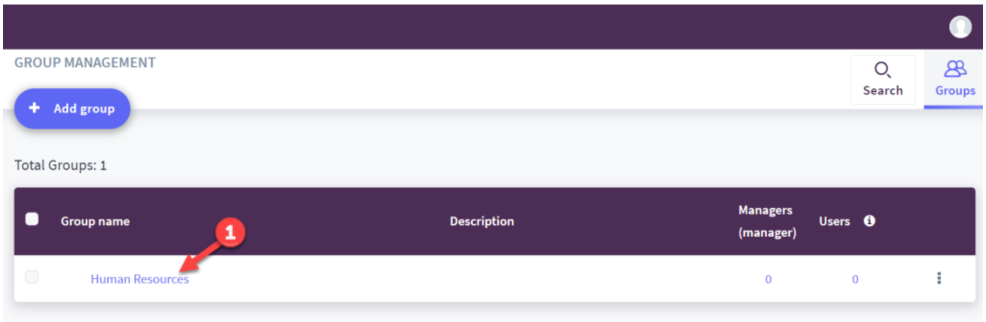
For the below example the Courses asset was selected

3. Select the courses you want to assign to the group
4. Click Save to save changes



6.7.4 Edit Group

1. Click on the group name

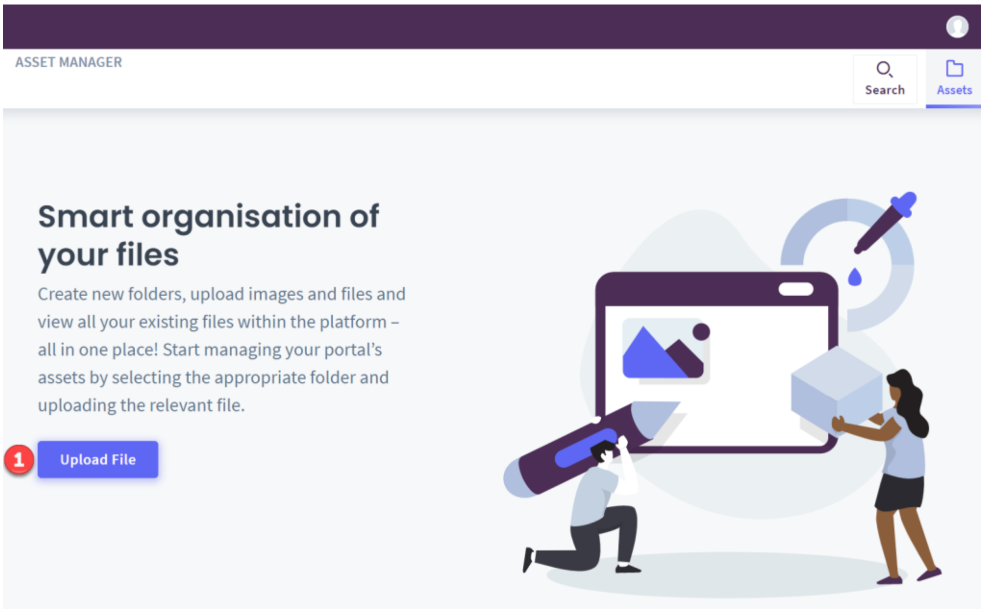


2. Make the required changes
3. Click Save to save changes

6.8 Asset Manager

Create new folders, upload images and files and view all your existing files within the platform – all in one place! Start managing your portal's assets by selecting the appropriate folder and uploading the relevant file.

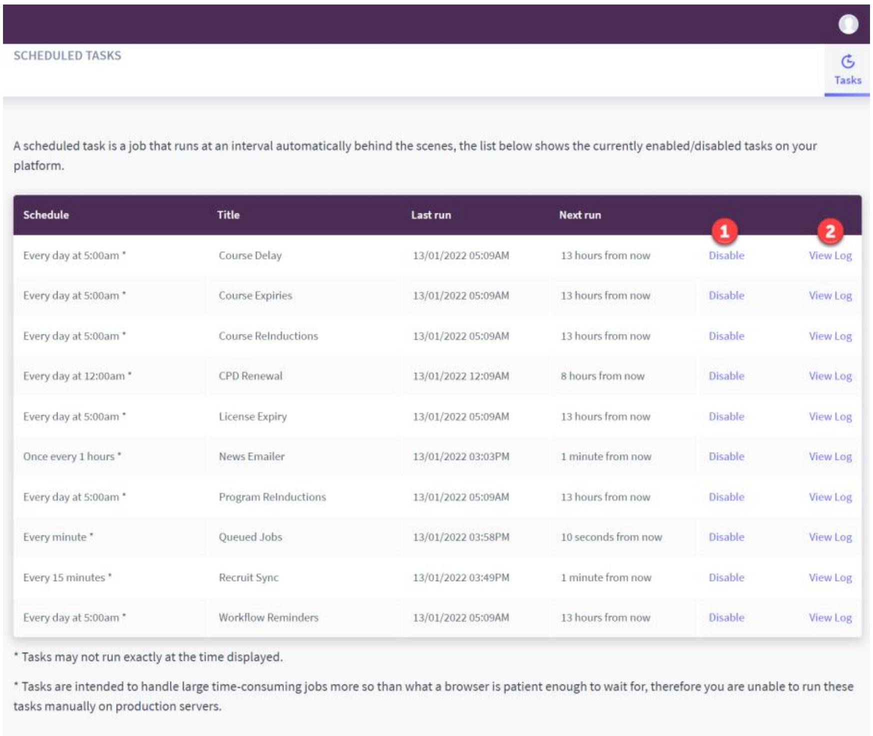
1. Click upload file



6.9 Scheduled Tasks

A scheduled task is a job that runs at an interval automatically behind the scenes, the list below shows the currently enabled/disabled tasks on your platform.

1. Click to Disable and then click again to enable any schedule
2. Click view log to view the log



Please note:

- Tasks may not run exactly at the time displayed
- Tasks are intended to handle large time-consuming jobs more so than what a browser is patient enough to wait for, therefore you are unable to run these tasks manually on production servers.

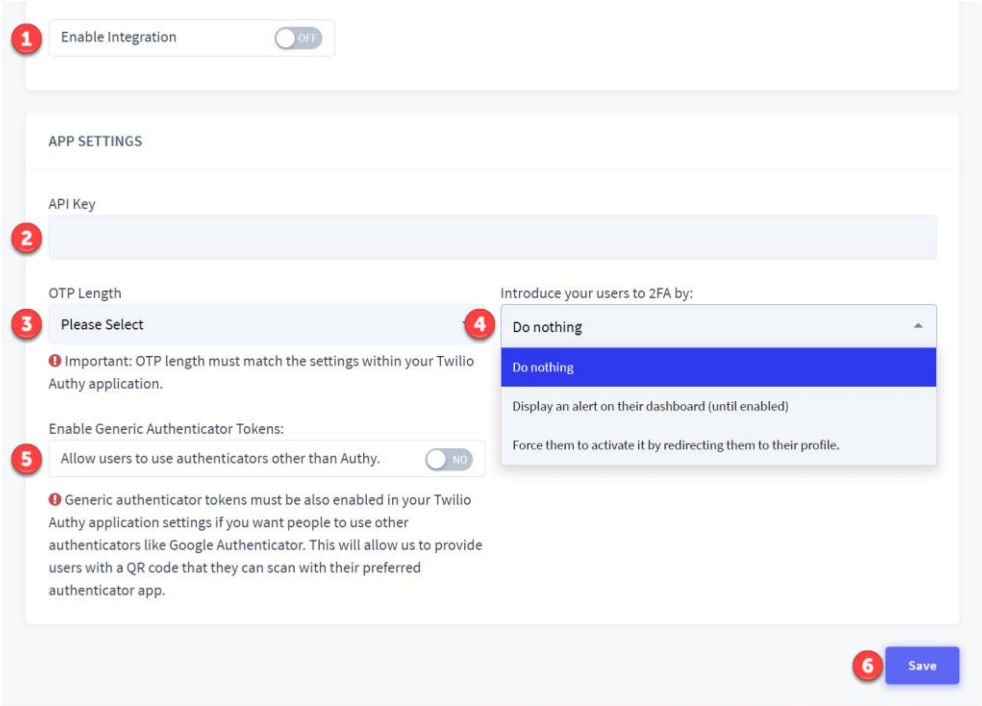
App Store

Twilio Authy

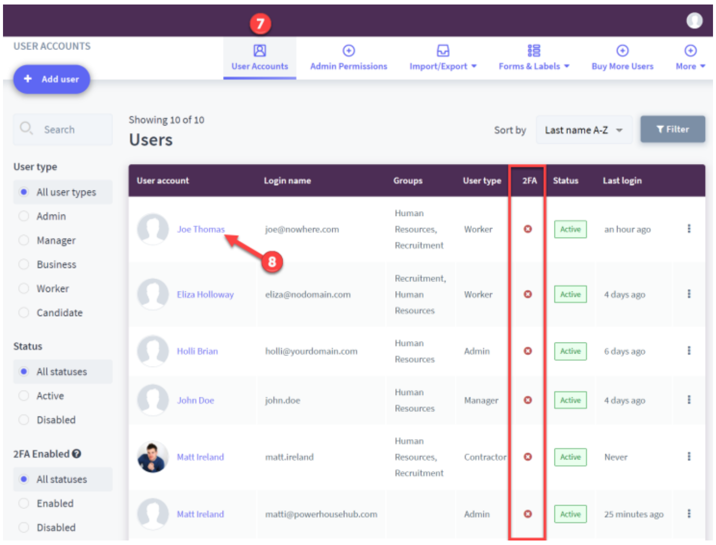
This integration adds a secondary layer of security to login forms.

- You must have an account with Twilio Authy. If you don't, you can create one here.
- You must have created an application within the Twilio Authy Console and obtain the API key for that application to enter below.
- You should consider including the "Phone" field in your registration forms (it is included by default).
- The application name you choose will be visible to your users.
- The user must enable two-factor authentication themselves by providing a valid mobile number, or you can enable it for them by doing the same.
- The user will be required to enter a code that they will receive via SMS in order to login in future.
- If the OTP length does not match the settings within your Twilio Authy application, users will not be able to enter the code they receive correctly, wasting SMS messages and preventing the user from logging in, otherwise you may lock yourself and your users out.
- You must disable this integration prior to cancelling your Twilio Authy subscription.

1. Toggle ON to enable the integration with Twilio Authy
2. Login into your Twilio account and copy the API Key
3. Set the OTP Length. Please note this must match the setting with in your Twilio Authy account. If using with Google Authenticator you will need to set to 6 digits
4. Select an option to introduce your users to 2FA
5. Toggle YES if you want people to use other authenticators like Google Authenticator. This will allow us to provide users with a QR code that they can scan with their preferred authenticator app.
6. Click Save to save changes



7. To activate Two-factor authentication (2FA) click on the User Account Tab
8. Click on the name of the user account that you want to activate 2FA



9. Click Edit Details
10. Ensure a mobile number has been entered
11. Click to enable Two-factor authentication