



PowerHouse Workforce User Guide

V.7.3

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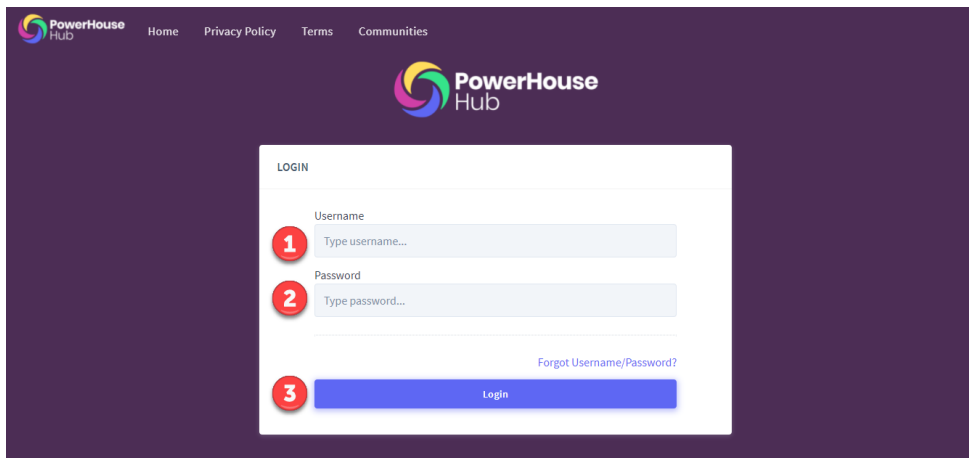
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1. The Administration Portal

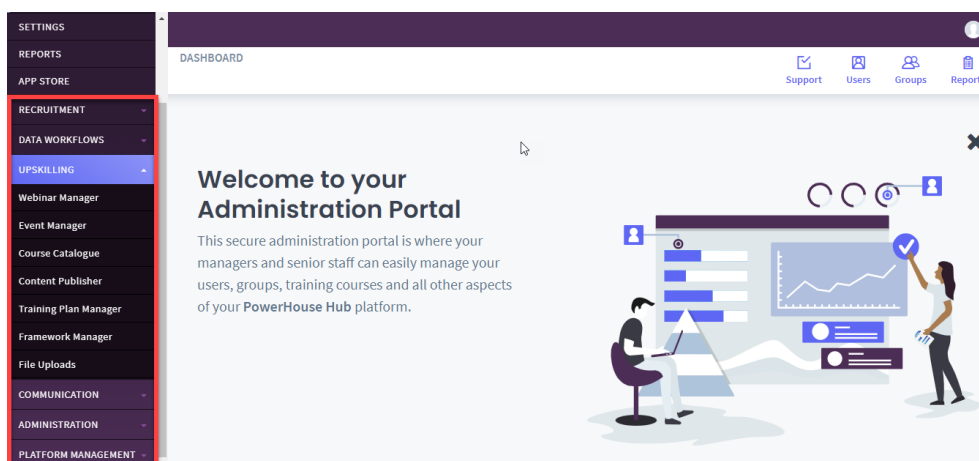
The secure Administration Portal is where you access your main log in for all editing and management on the platform from the back end. You would give Admin access to those that are either management or senior staff. The log in page is identical to that of the other users, yet once logged in under your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

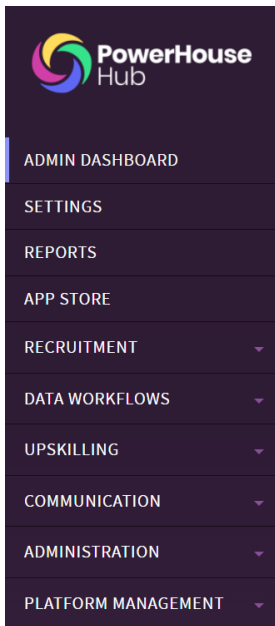


To access the modules within the platform, click the menu items within the left-hand side menu. As you click each section, it will expand to show all child modules.



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 clicking 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.

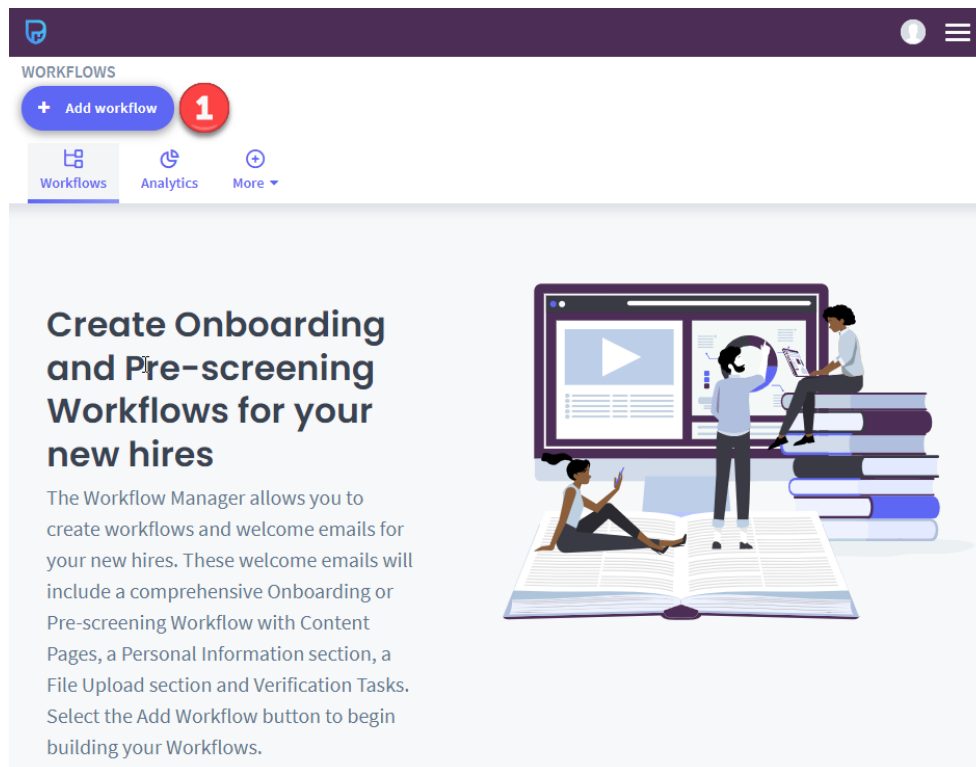
3. Data Workflows

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

The screenshot shows the 'ADD NEW WORKFLOW' form. It includes a 'Workflow details' section with instructions. The 'Workflow Type' section has two options: 'Build from scratch' (callout 2) and 'Duplicate from existing workflow' (callout 3). Below this are input fields for 'Workflow title' (callout 4), 'Workflow Type' (callout 5), and 'Description' (callout 6). A 'Status' dropdown is set to 'Active' (callout 7). A 'Save' button is at the bottom right (callout 8).

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

The screenshot shows the 'Casual Staff Onboarding' workflow editor. A red arrow (callout 1) points to a '+' button in the 'TASKS' section. A dropdown menu (callout 2) is open, listing tasks: 'Personal information', 'Content page', 'File upload', 'Courses and programs', and 'Self-Assessed Skills'. The workflow is currently 'Active'.

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.

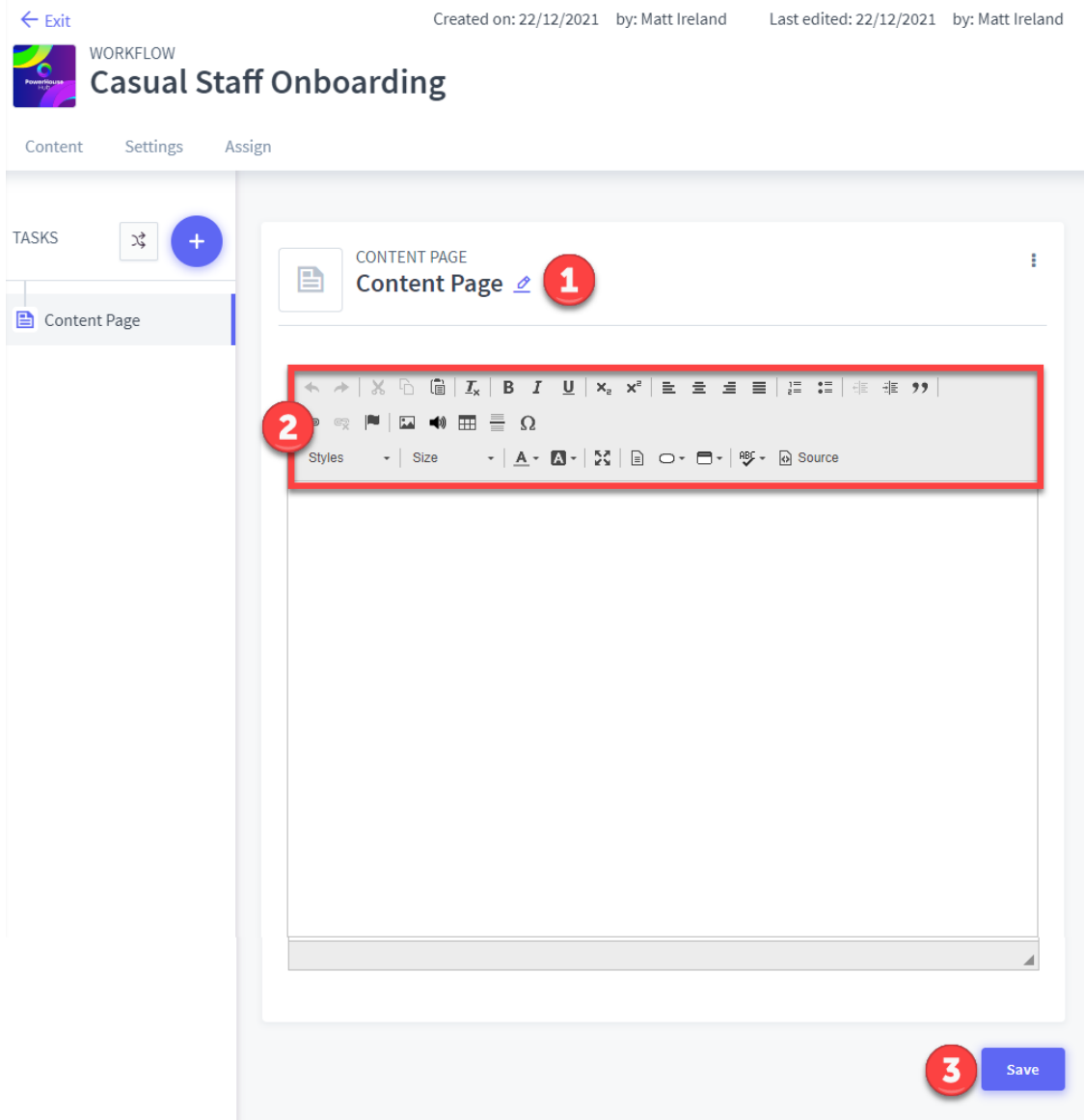
- 1 To change the title, click the edit icon, type in the desired title and click save button
- 2 In the CK editor add a brief description regarding the users next steps
- 3 Click Add Standard Field if you need to add another default field to your form
- 4 Click Add Custom Field if you need to add a 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

The screenshot displays the 'Casual Staff Onboarding' workflow editor. At the top, it shows 'Created on: 22/12/2021 by: Matt Ireland' and 'Last edited: 22/12/2021 by: Matt Ireland'. The main title is 'Casual Staff Onboarding' with a status of 'Active'. Below the title are tabs for 'Content', 'Settings', and 'Assign'. The 'Content' tab is active, showing a 'PERSONAL INFORMATION' form configuration. The form title is 'Personal Information' with an edit icon (1). Below the title is a CK editor (2) for adding a description. Underneath are two buttons: '+ Add Standard Field' (3) and '+ Add Custom Field' (4). The form fields are listed below, each with a hamburger menu (7) for reordering and a remove icon (6). The fields are: Role, Title (with a dropdown menu), First name *, Last name *, Address (Line 1), Phone (+61 2 1234 5678), Mobile (+61 412 345 678), and Email address *. At the bottom right is a 'Save' button (8).

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 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.

← Exit Created on: 22/12/2021 by: Matt Ireland Last edited: 22/12/2021 by: Matt Ireland

WORKFLOW
Casual Staff Onboarding

Content Settings Assign

TASKS +
File Upload

FILE UPLOAD
File Upload 1

2

File Upload
Select the file you want your users to upload. You can give it a different name.
Showing 0
File uploads

Selected File Upload * 3
Choose File

File Name 4

This file is mandatory 5 NO

Expiry Date Required 6 NO

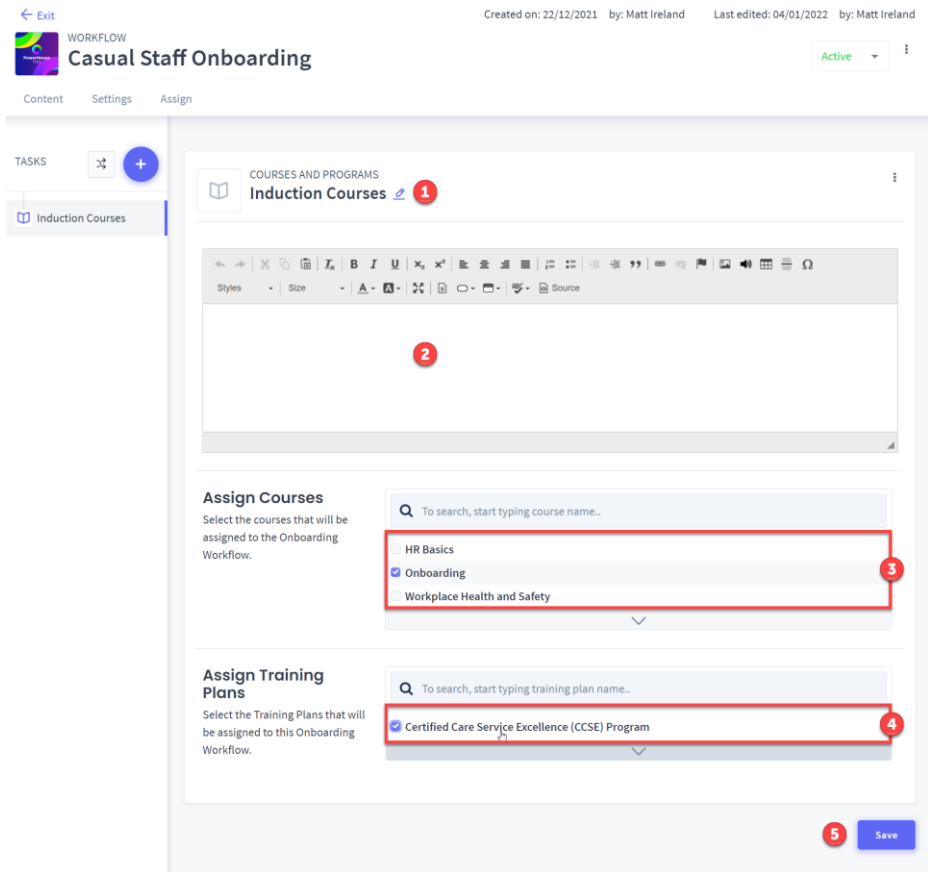
7 Save

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.

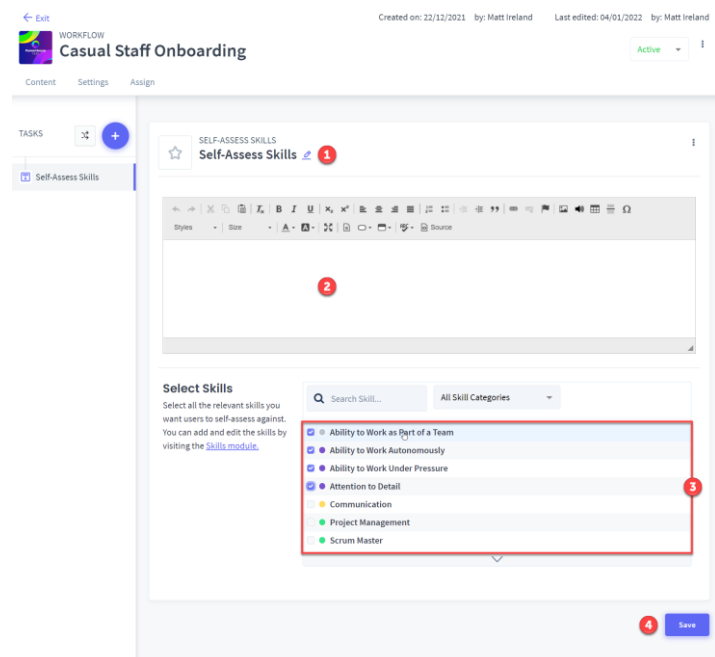
1. To change the title, click the edit icon, type in the desired title and click save button
2. Provide a general introduction in the CK Editor that explains what you want the user to do
3. Select the course(s) that will be assigned to the workflow
4. Select the Training Plans that will be assigned to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

The screenshot shows the 'EDIT ONBOARDING WORKFLOW SETTINGS' page for 'Casual Staff Onboarding'. The page is divided into several sections with numbered callouts:

- 1:** Points to the 'Settings' tab in the top navigation bar.
- 2:** Points to the 'Title' field, which contains 'Casual Staff Onboarding'.
- 3:** Points to the 'Thumbnail' field, which has a 'Choose File' button and 'No file chosen' text.
- 4:** Points to the 'Description' text area.
- 5:** Points to the 'Assign Time Frame' section, which has a dropdown menu and a toggle switch set to 'ON'.
- 6:** Points to the 'Set Reminders' section, which has a toggle switch set to 'ON' and three radio button options: '1 week before', '1 day before', and 'On the day'.
- 7:** Points to the 'Status' dropdown menu, which is currently set to 'Active'.
- 8:** Points to the 'Assign Certificate' dropdown menu, which is currently set to 'No Certificate'.
- 9:** Points to the 'Send overdue manager alerts' toggle switch, which is currently set to 'NO'.
- 10:** Points to the 'Save' button at the bottom right of the form.

At the top of the page, there is a navigation bar with 'Content', 'Settings', and 'Assign' tabs. The 'Settings' tab is active. The page also shows metadata: 'Created on: 22/12/2021 by: Matt Ireland' and 'Last edited: 04/01/2022 by: Matt Ireland'. A 'Cancel' button is located at the bottom left.

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

← Exit WORKFLOW Created on: 22/12/2021 by: Matt Ireland Last edited: 04/01/2022 by: Matt Ireland

Casual Staff Onboarding

Active

Content Settings **Assign**

ASSIGN ONBOARDING WORKFLOW

Assign Workflow to Groups

Workers and Managers assigned to the following groups will have access to this workflow.

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. Please check the following items and ensure they are correct:

1. Personal Information - Page fields being mandatory or not
2. File Uploads
3. Courses / Training Plans

To search, start typing a group name..

- Human Resources
- Recruit Job Posts
- test

Transfer after completion

Select the groups that you would like the user to be assigned to upon successful completion of this Onboarding Workflow.

If you do not choose a group/s here, the user will remain assigned to the default groups assigned above.

To search, start typing a group name..

- Human Resources
- Recruit Job Posts
- test

Notification Email

Tick to send all assigned users an email to notify a workflow has been assigned.

Would you like to send a Notification Email?

Yes, send a notification email to all assigned users

Cancel Save

4. Upskilling

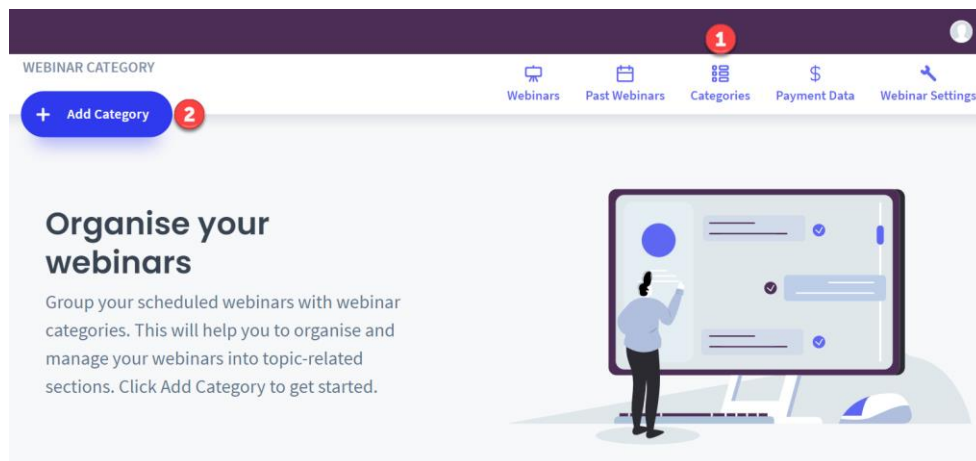
4.1 Webinar Manager

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.

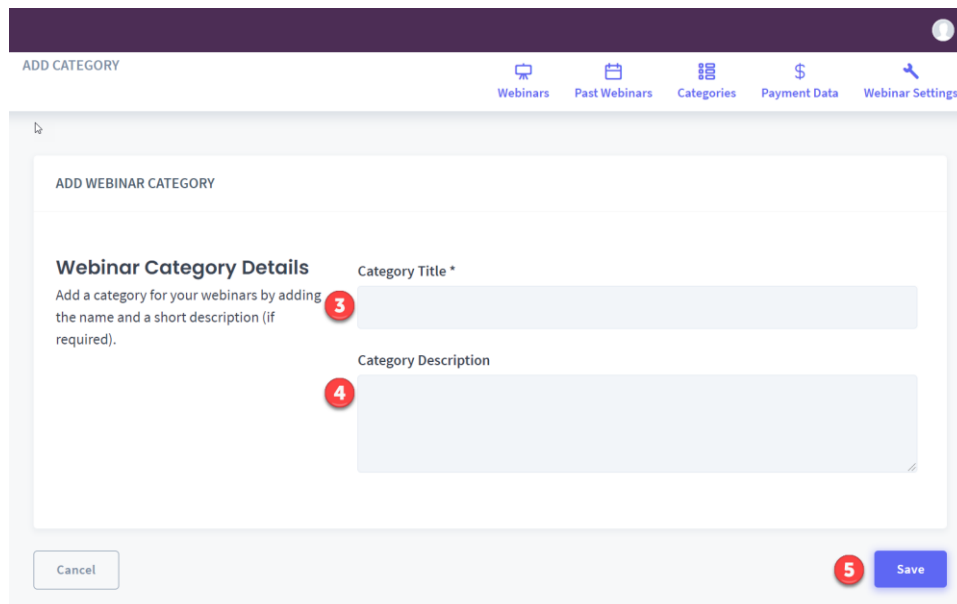
4.1.1 Creating categories

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

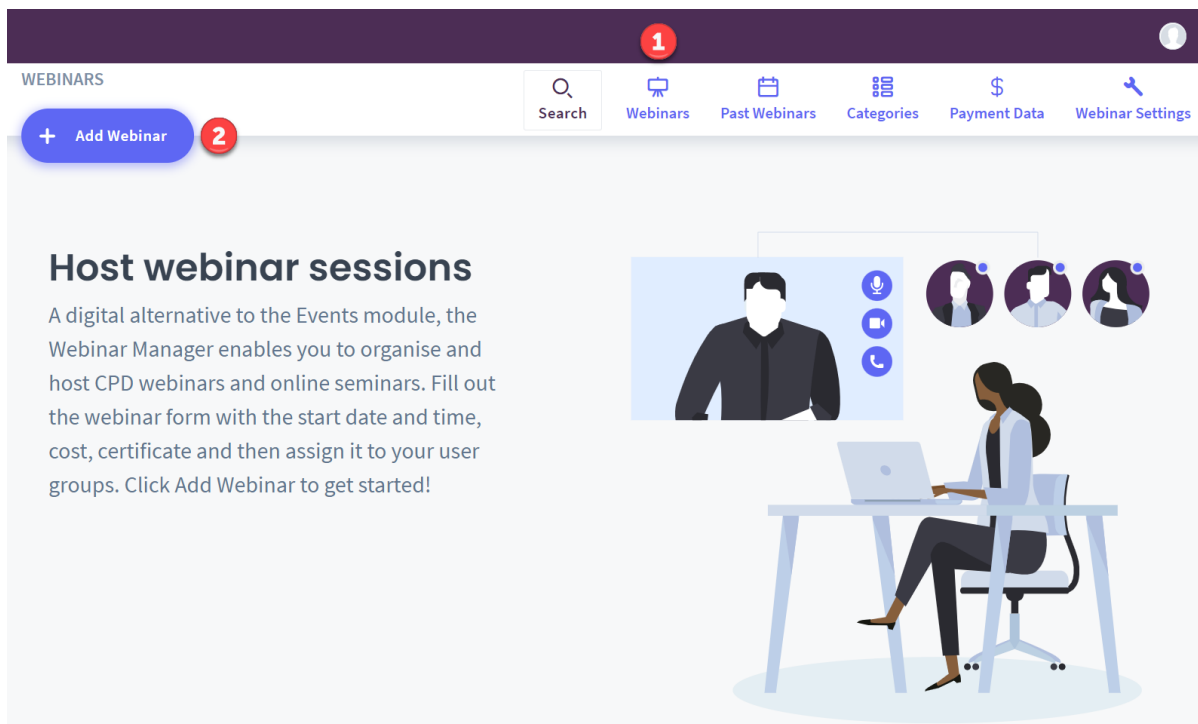


3. Add the category title
4. Add a category description
5. Click Save to save changes

A screenshot of the 'ADD WEBINAR CATEGORY' form. The form is titled 'ADD WEBINAR CATEGORY' and has a sub-heading 'Webinar Category Details'. Below the sub-heading, there is a text input field for 'Category Title *' with a red circle containing the number '3' next to it. Below the 'Category Title' field is a text area for 'Category Description' with a red circle containing the number '4' next to it. At the bottom of the form, there are two buttons: 'Cancel' and 'Save'. The 'Save' button has a red circle containing the number '5' next to it. The navigation bar at the top is the same as in the previous screenshot, with the 'Categories' tab selected.

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

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

Webinar settings

4 Certificate 5 Webinar Category 6 Webinar Status
No Certificate Select a webinar category Active

Date & time

Provide information on the date and duration of the webinar.

Start Date * Start Time * Finish Date * Finish Time *
05/01/2022 09:00 06/01/2022 17:00

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

1 If a group is assigned to more than one price, the system will display the cheapest price for the user

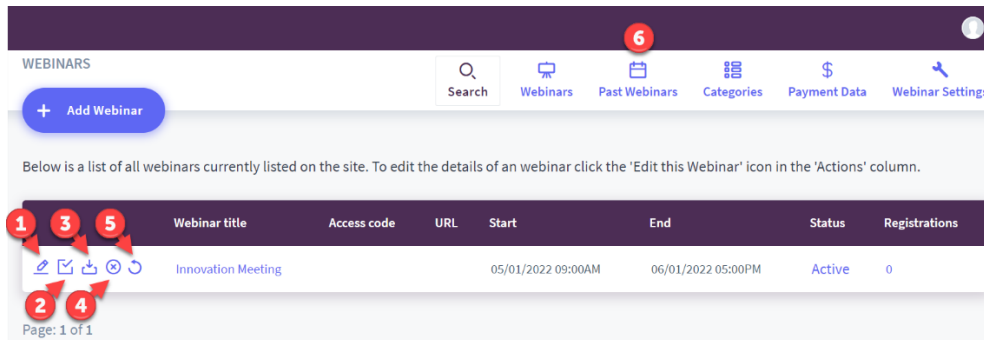
10 Group Price \$ (eg. 100.00) Group Assigned
100 Human Resources, Recruitment
+ Add Group Price

Cancel

11 Save

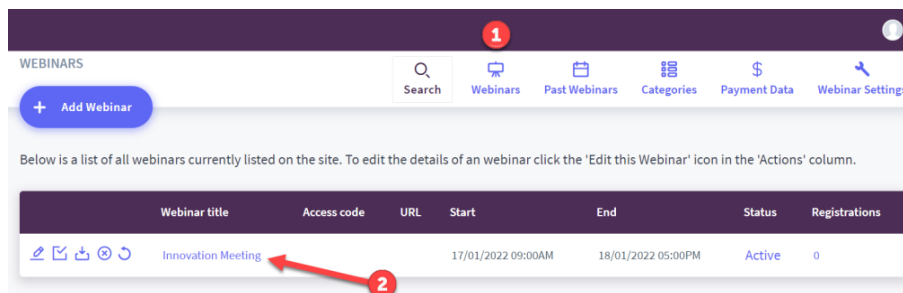
4.1.3 Webinar Action Buttons

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

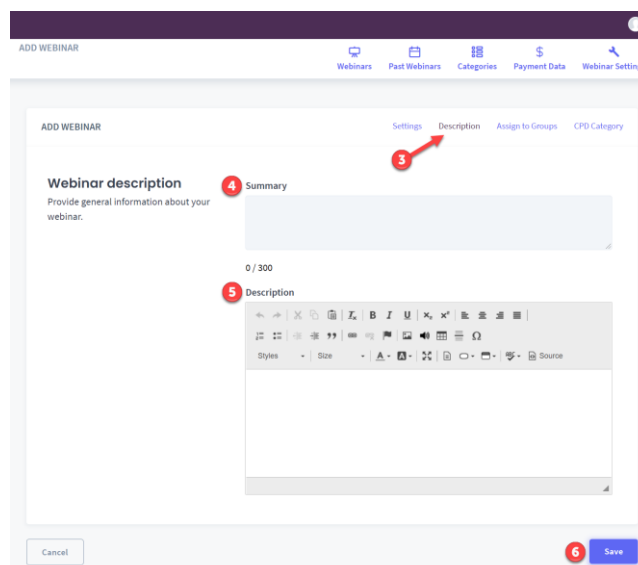


4.1.3 Webinar Description

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



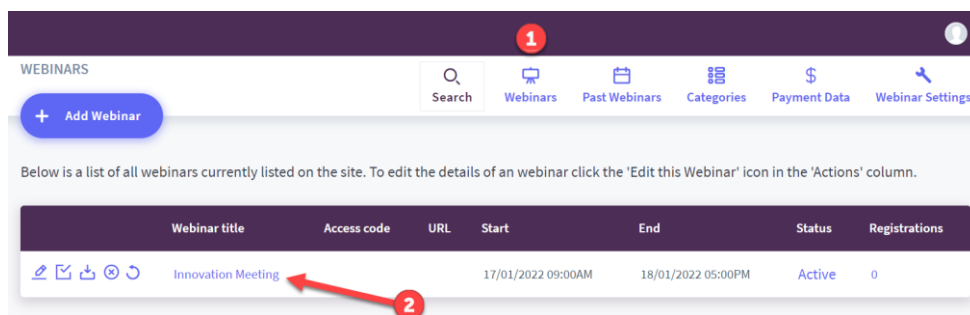
3. To add a description, click on the Description link
4. Add a summary. This will display inside the webinar thumbnail on the learner portal
5. Add a description. This is what the learners see when they select the See More option
6. Click Save to save changes



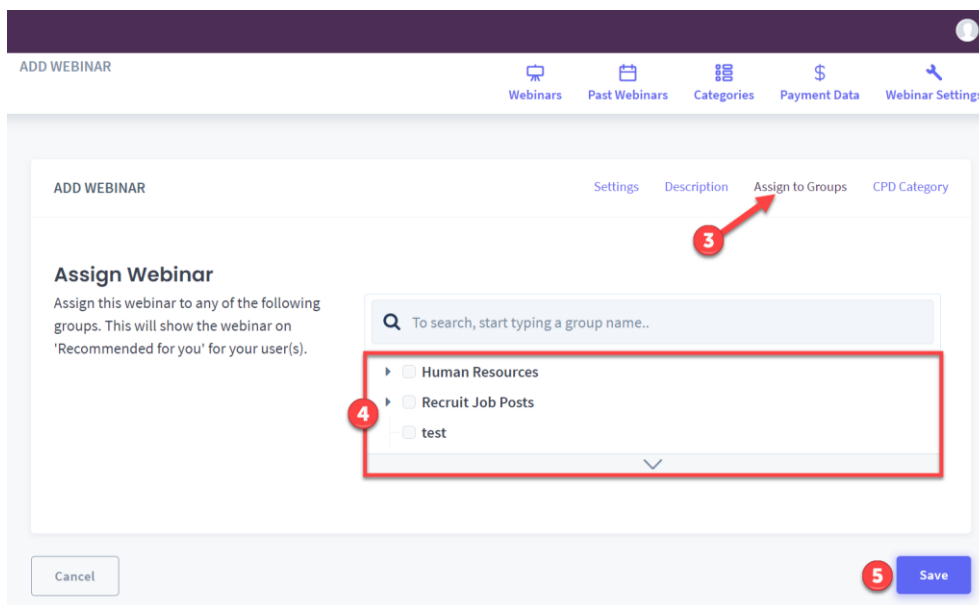
4.1.4 Assign Webinar to groups

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

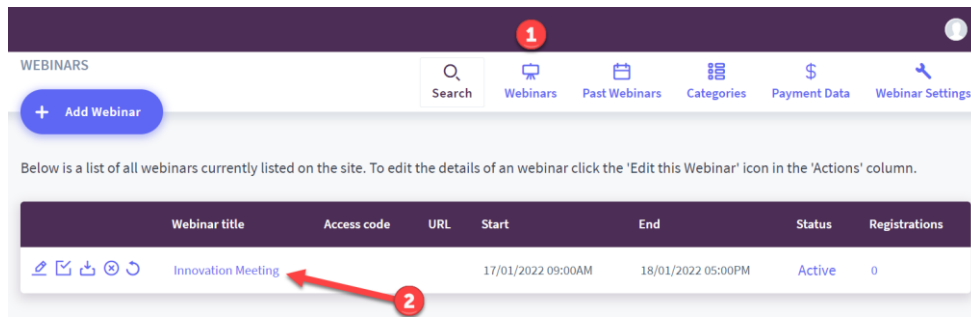


4.1.5 CPD Category

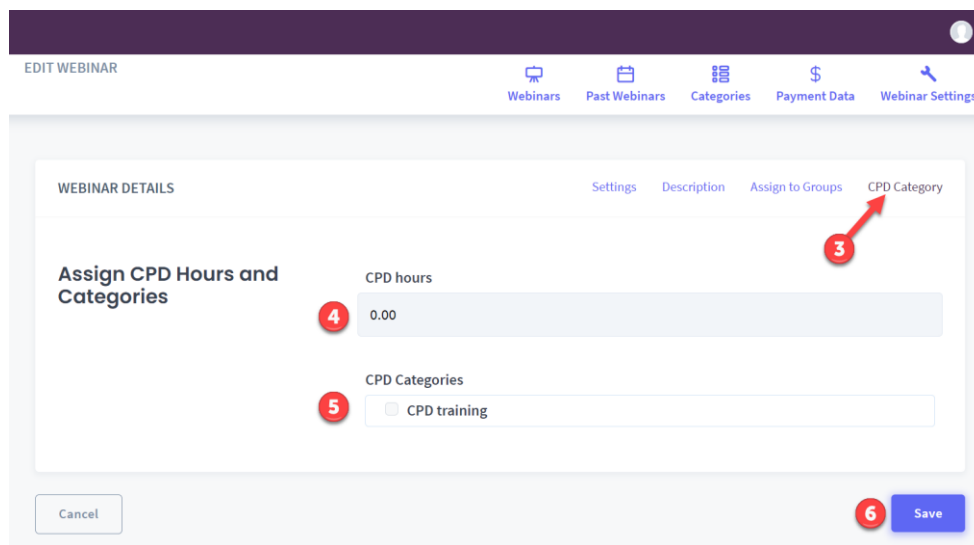
CPD Settings need to be enabled for the CPD Category link to appear. To activate this, navigate to the Setting module, and select CPD from the Platform dropdown.

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

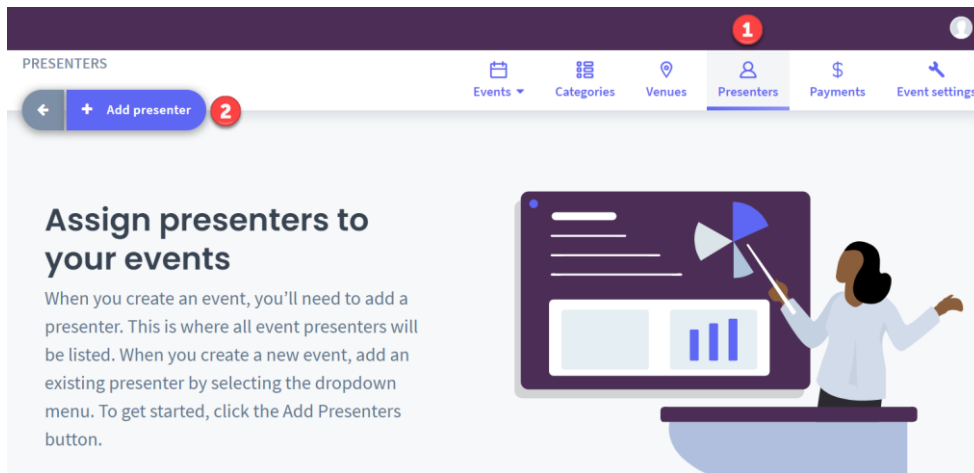
The Event Manager allows you to create and manage face-to-face training sessions, seminars and instructor-led learning. See a snapshot of attendance and waitlists at any time with powerful reporting capabilities. Fill out all applicable fields, including cost, venue and presenter, and then assign the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

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

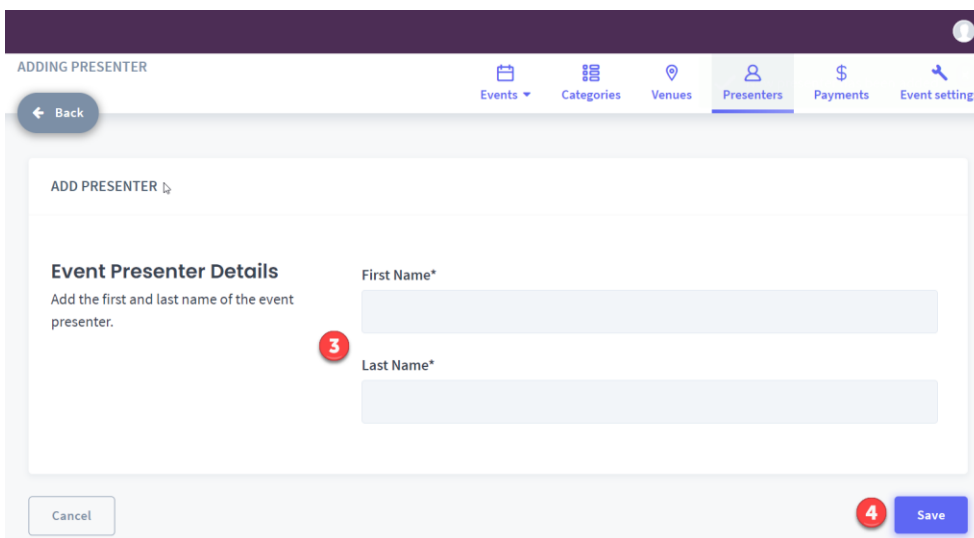
4.2.1 Presenters

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



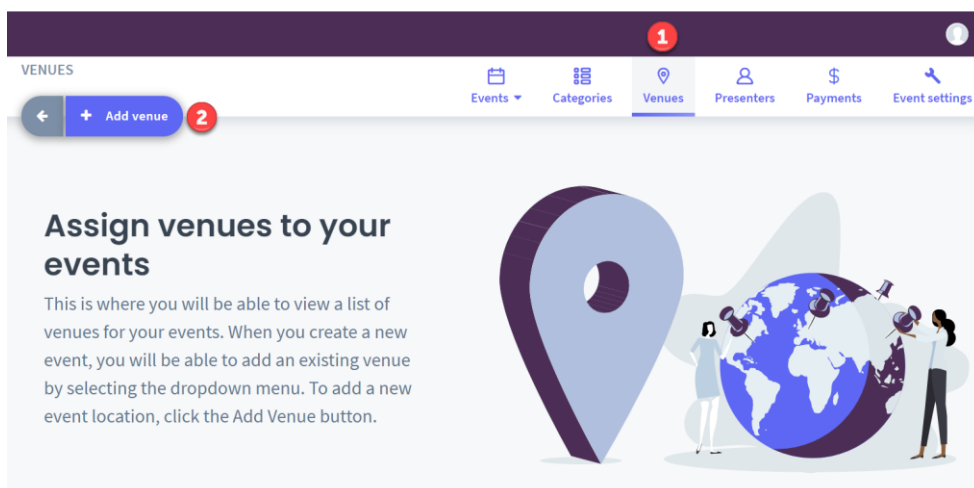
3. Fill in the first and last name of the presenter
4. Click Save to save changes



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

ADD VENUE

← Back

ADD VENUE

Event Venue Details
Add venue details, including the name and address.

Venue Name*

Street Address 1*

Street Address 2

City * State* Postcode*

Status
Active

Cancel Save

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

EVENT CATEGORIES

← + Add category

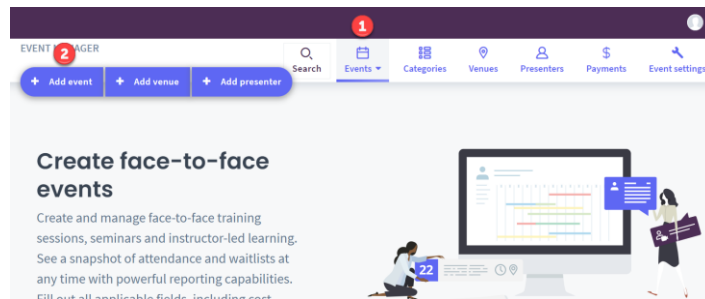
Organise your events

Once you have started scheduling your events, you can create categories to help sort and manage your events into meaningful groups. Click Add Category to get started.

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

ADD EVENT

Events Categories Venues Presenters Payments Event settings

Back

EVENT DETAILS General Description Sessions Assign to Groups CPD Category

Session 1 Details

Provide general information about the details of each session, such as the venue and presenter. Each session can be edited independently and can occur on multiple dates at several venues.

Venue: Please select

Presenter: Please select

Start / Finish Date Time * Max Attendees * Status: Active

Allow registration between Start and Finish Date: OFF

+ Add Session

Cancel Save

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

EVENT MANAGER

Search Events Categories Venues Presenters Payments Event settings

+ Add event + Add venue + Add presenter

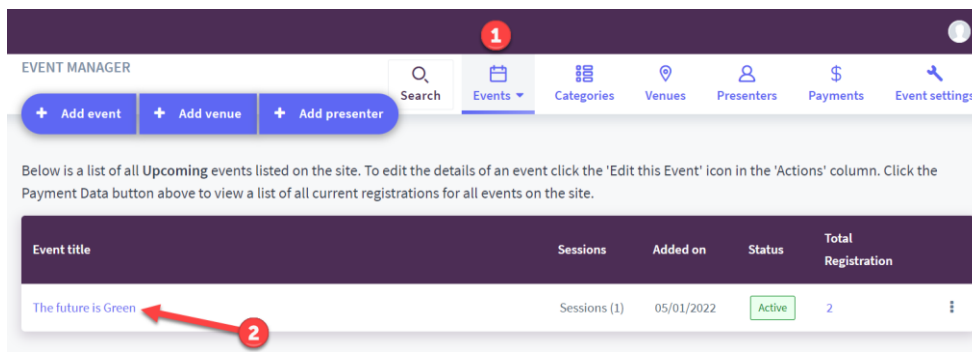
Below is a list of all Upcoming events listed on the site. To edit the details of an event click the 'Edit this Event' icon in the 'Actions' column. Click the Payment Data button above to view a list of all current registrations for all events on the site.

Event title	Sessions	Added on	Status	Total Registration
The future is Green	Sessions (1)	05-Jan-2022	Active	2

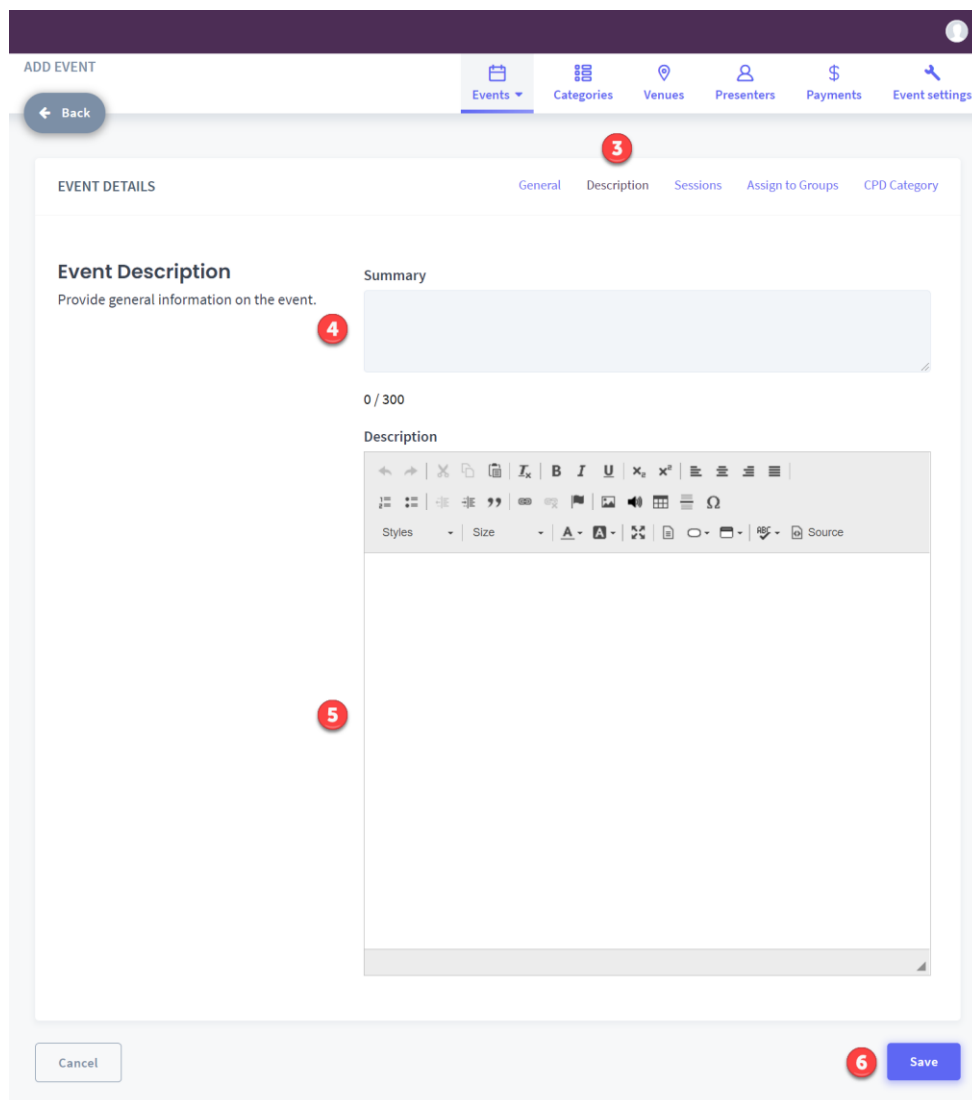
Page: 1 of 1

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

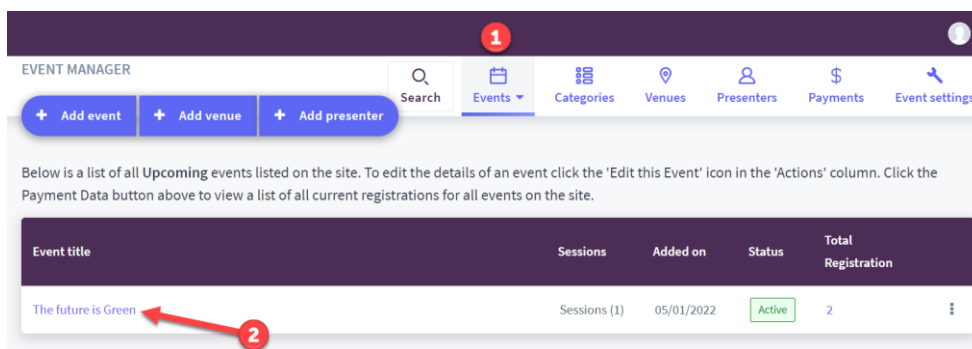


3. To add a description, click on the Description link
4. Add a summary
5. Add a description
6. Click Save to save changes

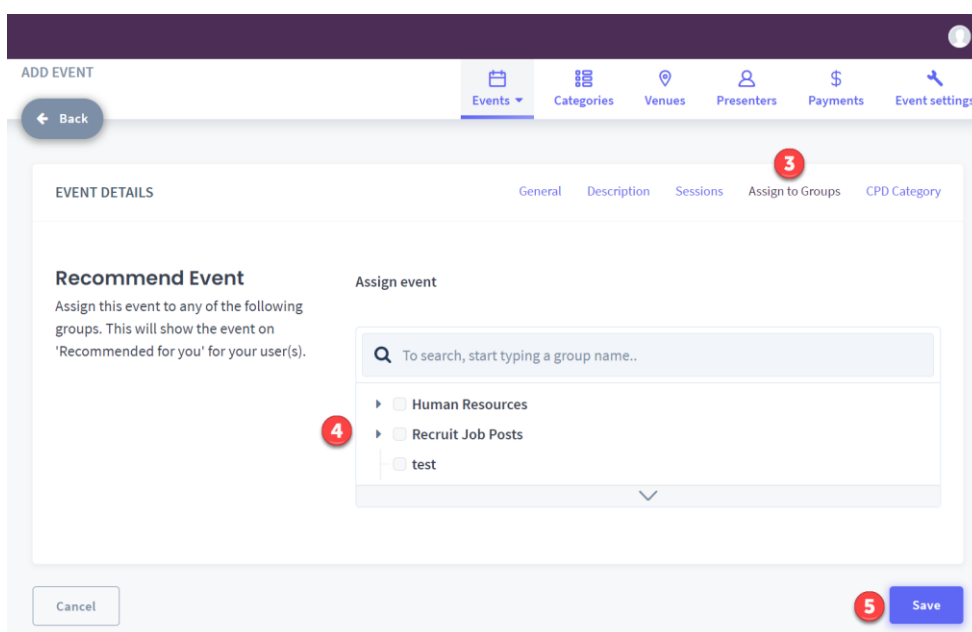


4.2.7 Assign the Event to Groups

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



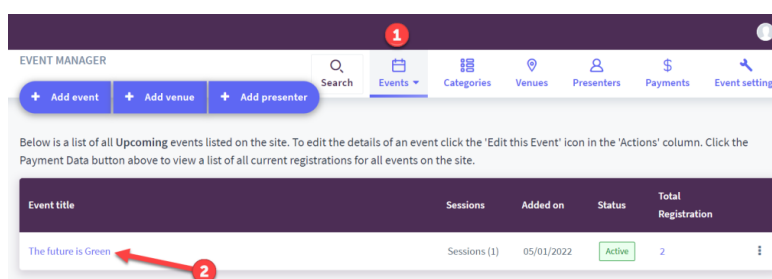
3. Click on the assign to groups link
4. Select the relevant groups
5. Click Save



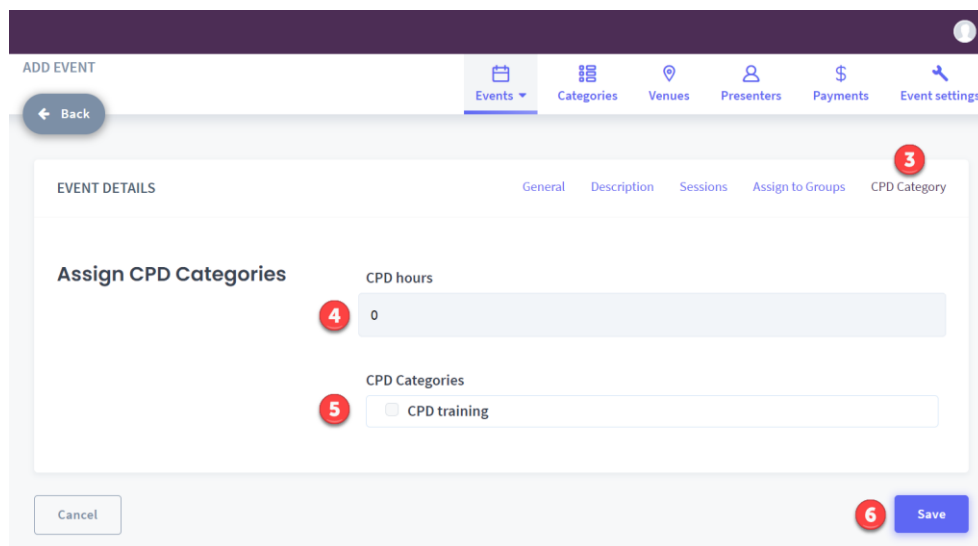
4.2.8 CPD Category

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



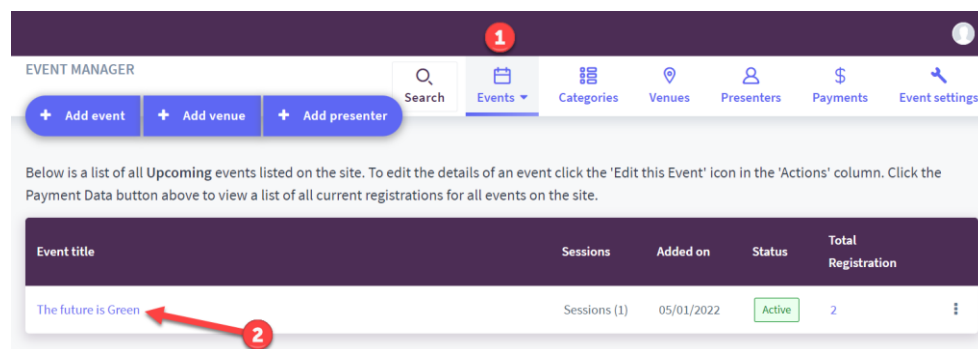
3. Click the CPD Category link
4. Enter CPD hours
5. Select CPD Category
6. Click Save to save changes



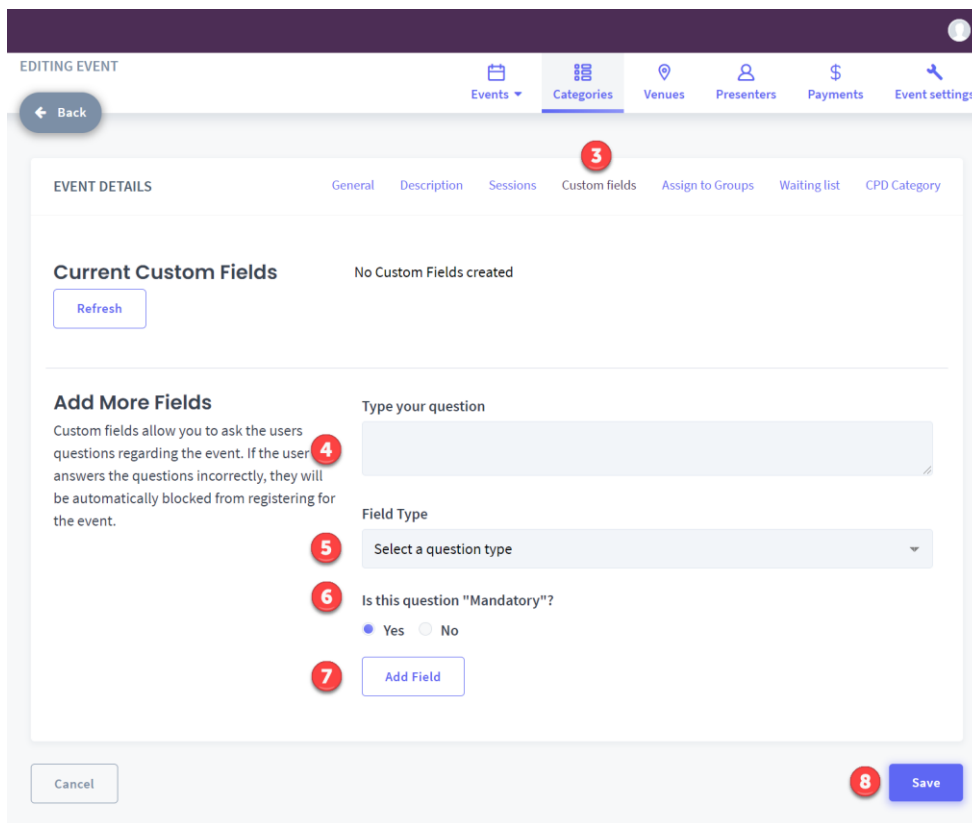
4.2.10 Custom Fields

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



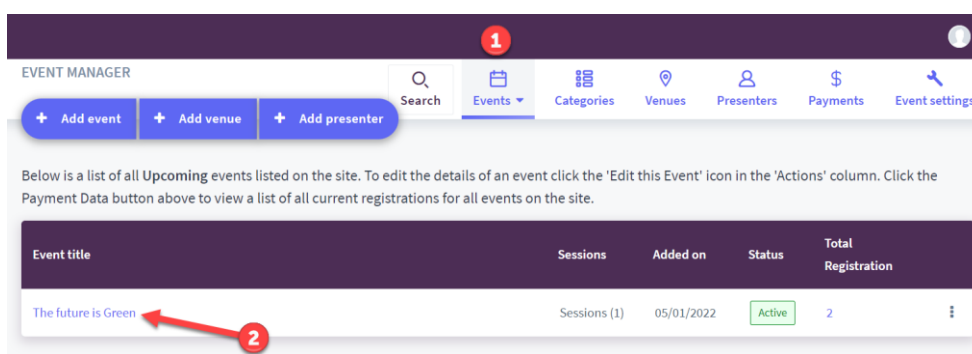
3. Click on the Custom Fields link
4. Type your question
5. Select a question type
6. Select if the question is mandatory
7. Click Add Field to add another question
8. Click Save to save changes



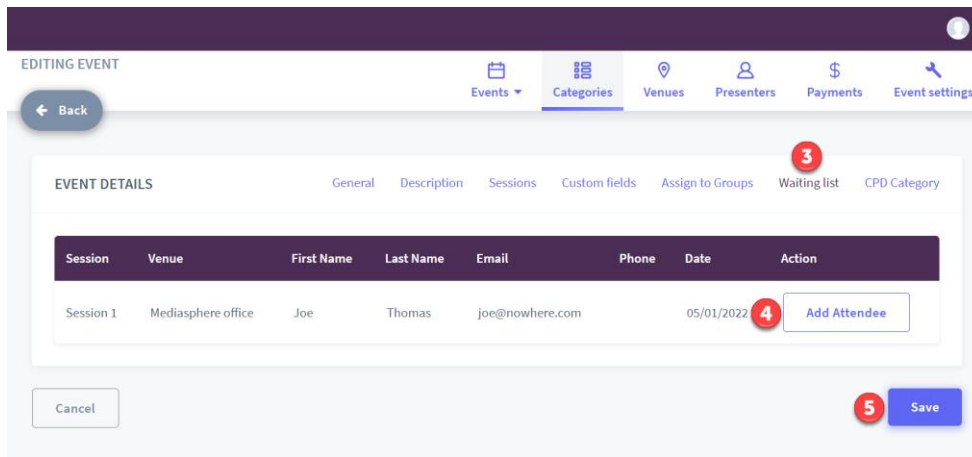
4.2.11 Waiting List

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

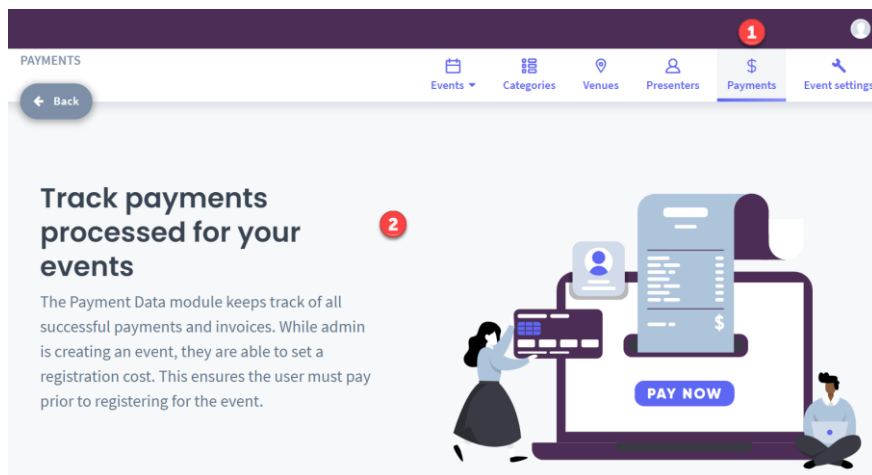


3. Click on the Waiting list link
4. Click add attendee to add them to the event
5. Click Save to save changes



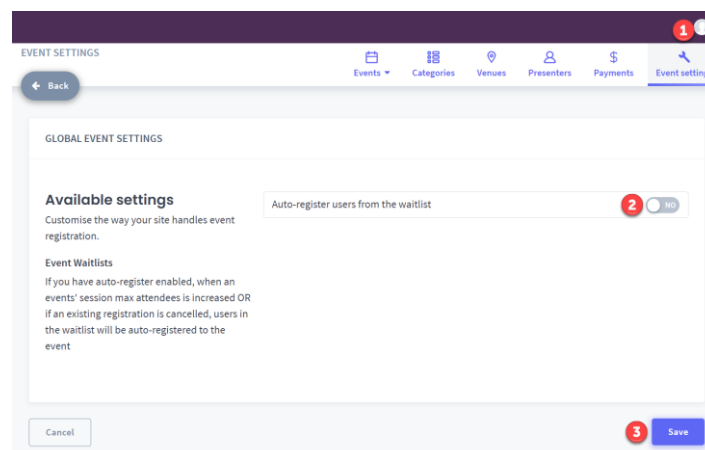
4.2.12 Event Payments

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

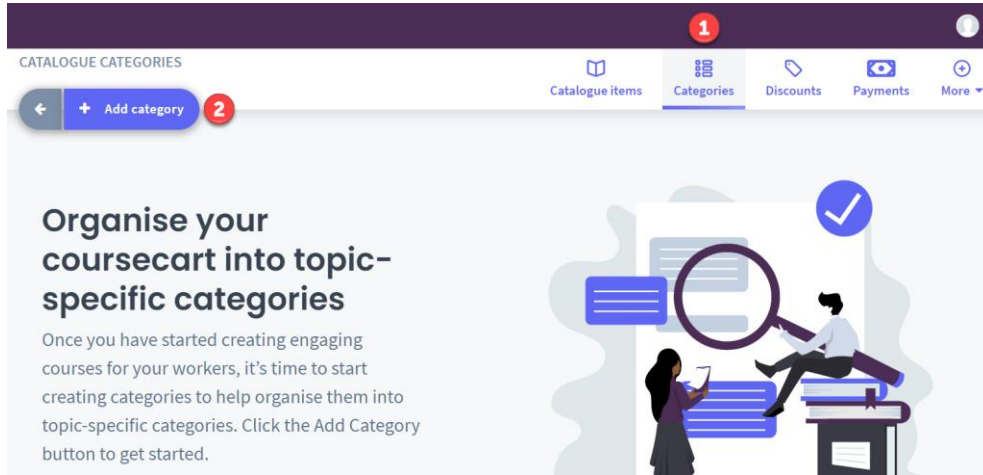


4.3 Course Catalogue

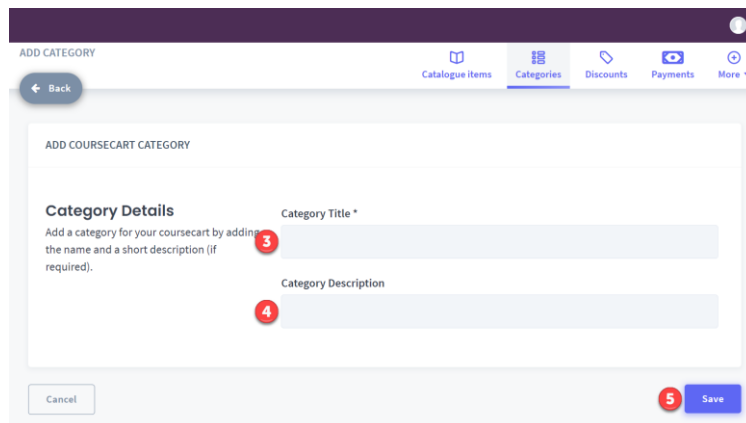
The Course Catalogue allows you to add and sell courses via the Buy Courses module on the learner portal.

4.3.1 Adding a course category

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

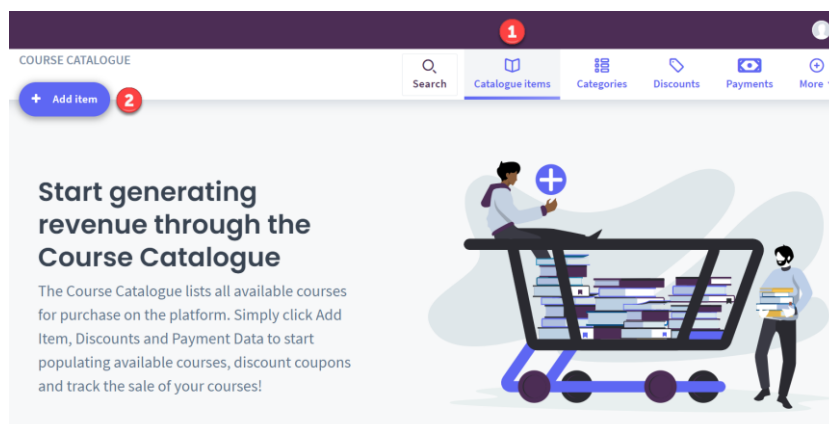


3. Add Category Title
4. Add Category Description
5. Click Save to save changes



4.3.2 Add Course Catalogue Item

1. Click catalogue items
2. Click add item



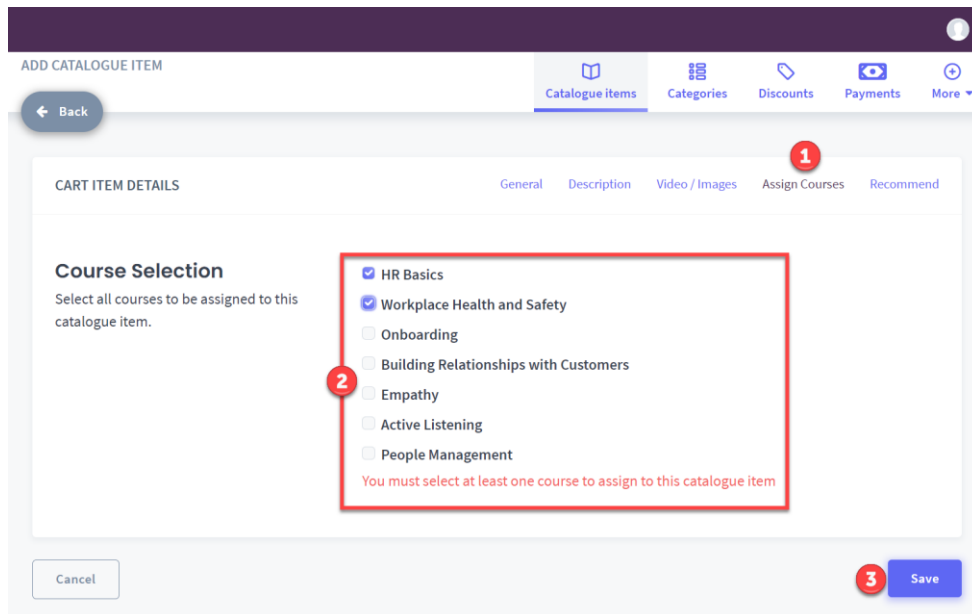
3. Add a course title
4. Set course catalogue status. **Active** means the course can be purchased from learner portal. **Disabled** means the user be able to see the course on the portal.
5. Assign Course to the relevant category
6. Select tick box to show on the front end of the platform
7. Select 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

The screenshot shows the 'ADD CATALOGUE ITEM' form with the following elements and callouts:

- 3:** Course Catalogue Title * (text input field)
- 4:** Course Catalogue Status (dropdown menu, currently set to 'Active')
- 5:** Course Catalogue Category (dropdown menu, currently set to 'No category assigned')
- 6:** Show On Frontend (checkbox, currently checked)
- 7:** Cart Cost section with radio buttons for 'This coursecart is FREE' (unchecked) and 'This coursecart has a COST' (checked).
- 8:** A table for 'Group Price' with columns for 'Group Price \$ (eg. 100.00)' and 'Group Assigned'. The first row has '100' in the price column and 'Find groups...' in the group column. A red box highlights this row and the '+ Add Group Price' button below it.
- 9:** Save button at the bottom right.

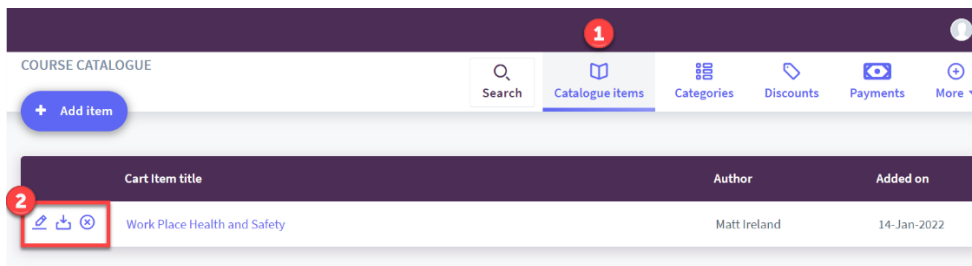
4.3.3 Assign Courses

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



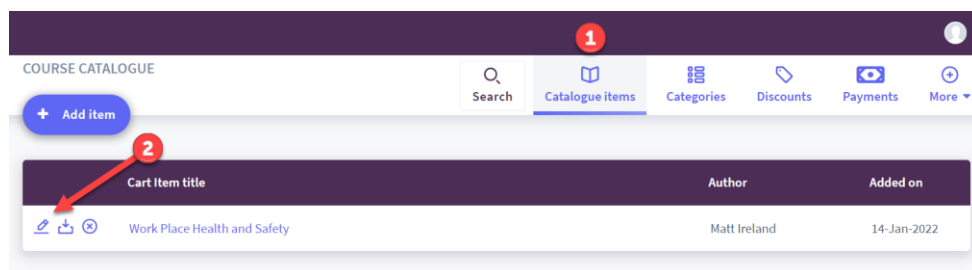
4.3.4 Course Catalogue action buttons

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

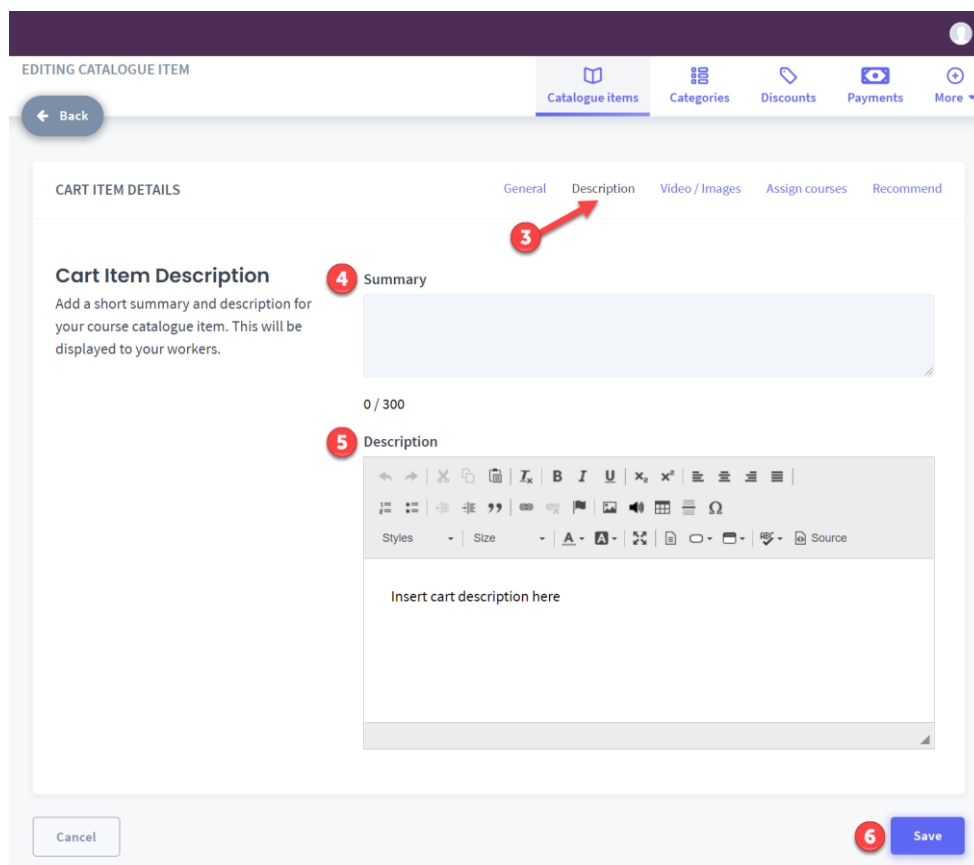


4.3.5 Catalogue Description

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

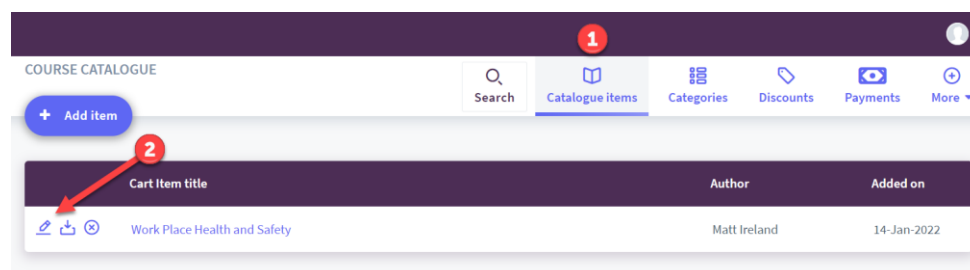


3. Click on the Description link
4. Add a summary
5. Add a description
6. Click Save to save changes

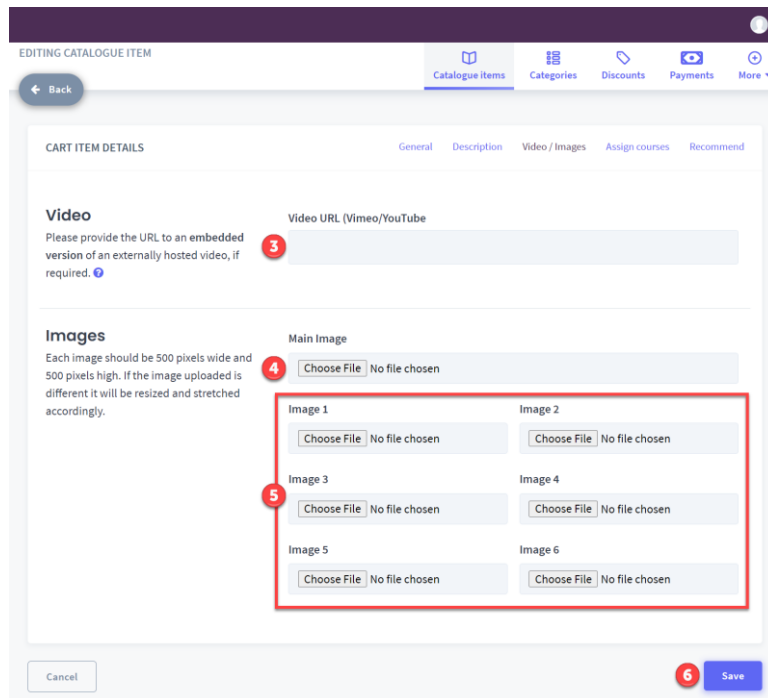


4.3.6 Adding Videos and Images

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

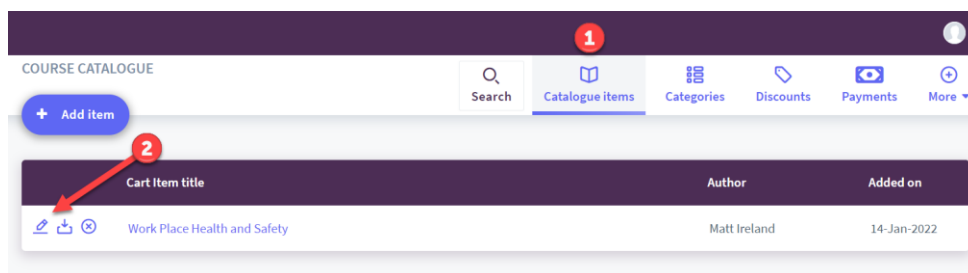


3. Option to enter the URL to an embedded video (YouTube, Vimeo etc). The learner will see the video when clicking the View Details button (of the course) in their portal.
4. Click choose file to upload the main image for the course. The learner will see this image when click Buy Courses in their portal.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

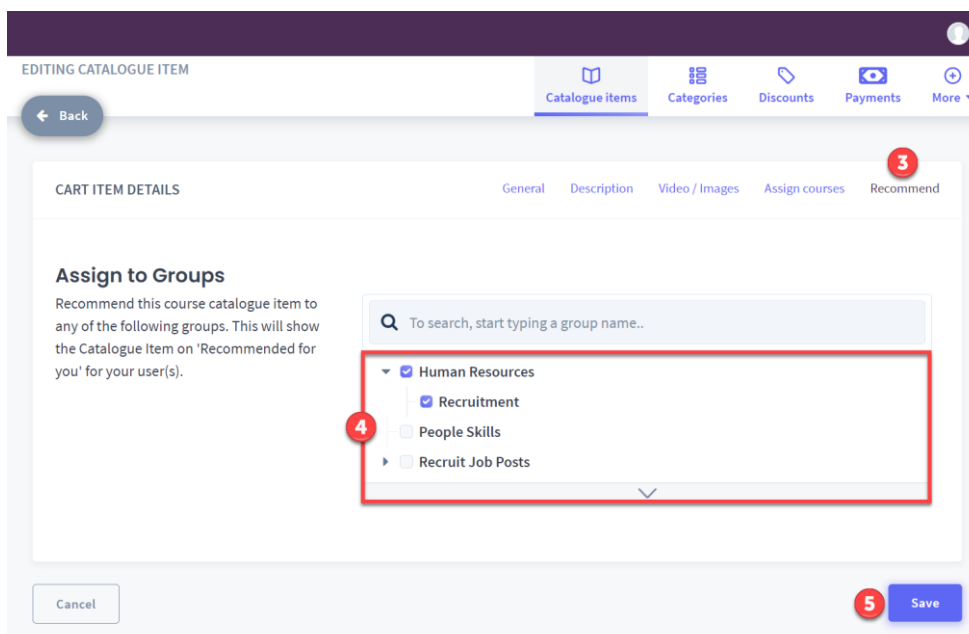


4.3.7 Recommend (Assign Course to a Group)

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

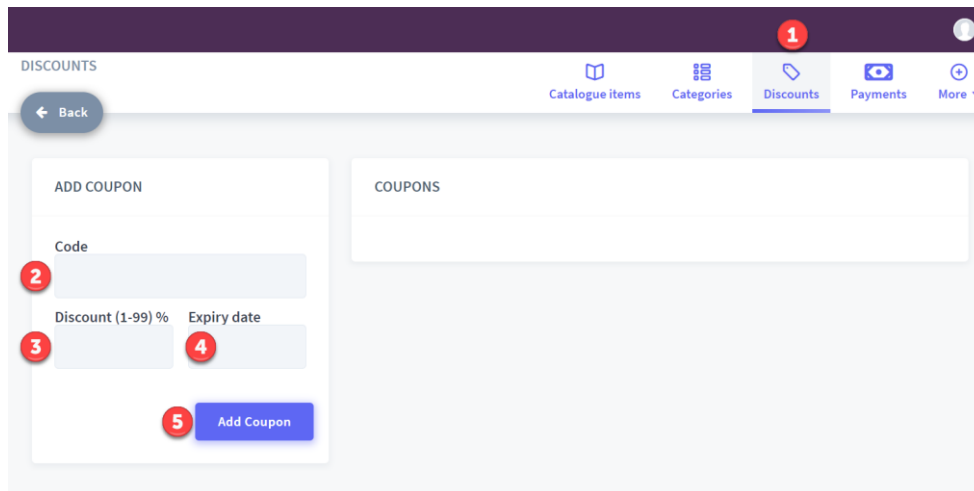


3. Click the Recommend link
4. Assign cart item to a group(s)
5. Click Save to save changes



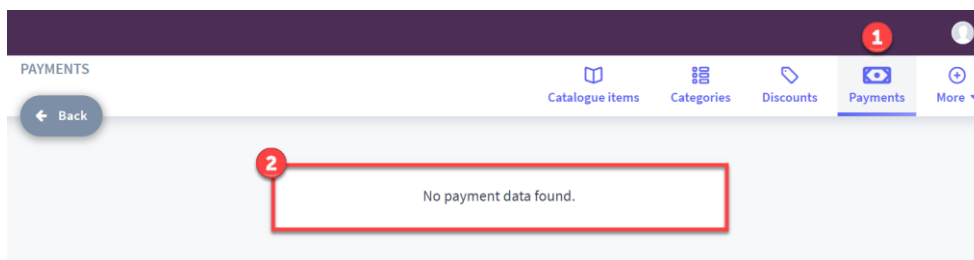
4.3.8 Adding a discount coupon

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



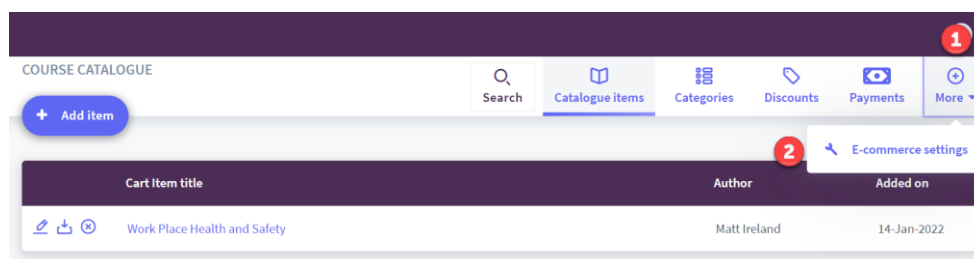
4.3.9 View Payment Data

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

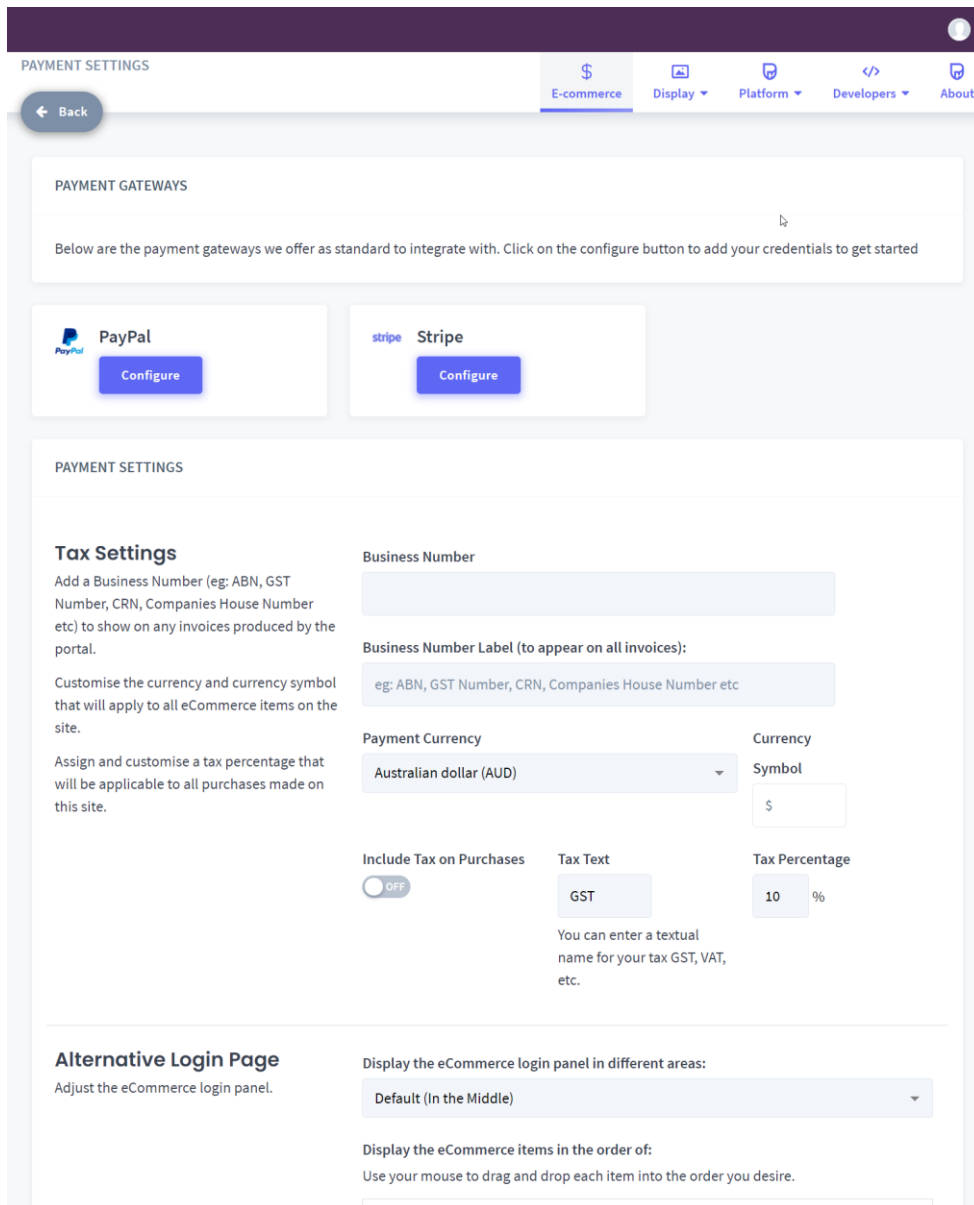


4.3.10 More - E-commerce Settings

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



3. You will be taken to the Payment Settings

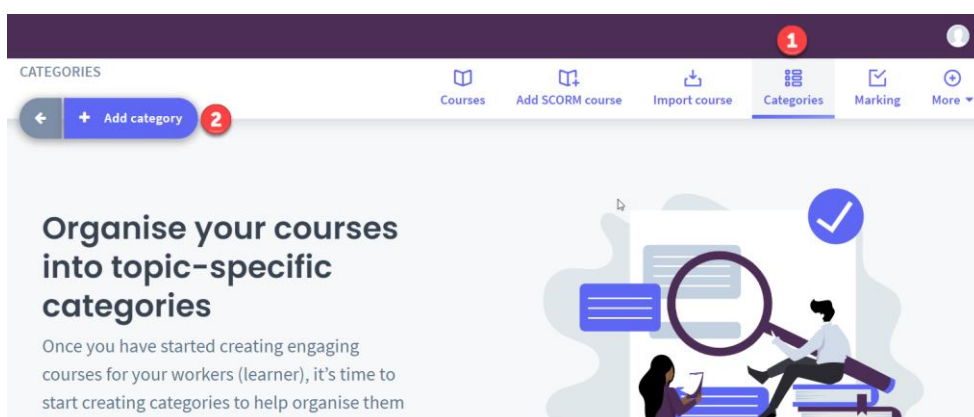


4.4 Content Publisher

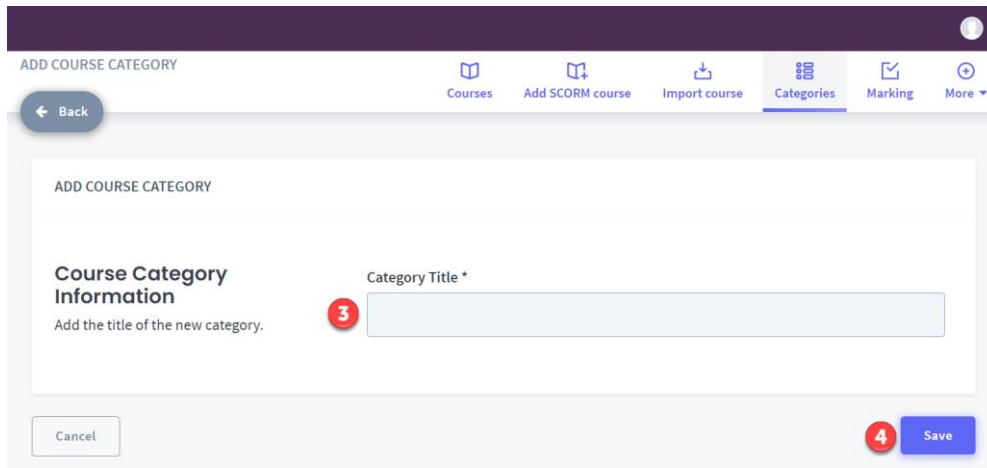
Enhance your workers (learner) skills by adding or importing courses to your online training platform.

4.4.1 Categories

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

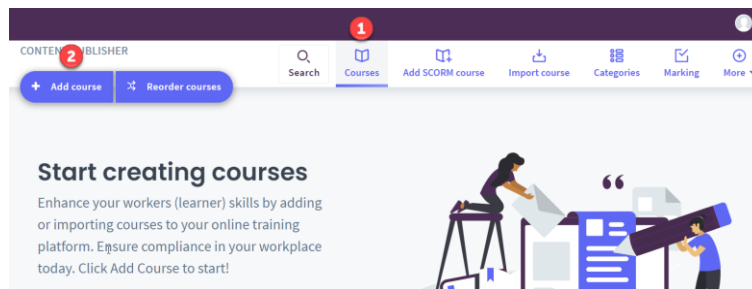


3. Add a category title
4. Click Save to Save changes



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

ADD COURSE Settings CPD Category

Course Information
Create a new course by adding the course title, the unique identifier, pass rate, status and certificate.

Course Title * **3**

Course Unique Identifier **4**

Pass Rate **5** 100% Search Keyword **6**

Assign Certificate **7** No Certificate Assign To Category **8** Select...

Training Time **9** Hour(s) Minute(s) Course Status **10** Completed

11 Send Managers an email and certificate copy when a Workers completes this course

Assign as mandatory:

To search, start typing a group name

- 12** Human Resources
- Recruit Job Posts
- test

Cancel Save

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

ADD COURSE Settings CPD Category

Assign CPD Categories

CPD hours **14** 0

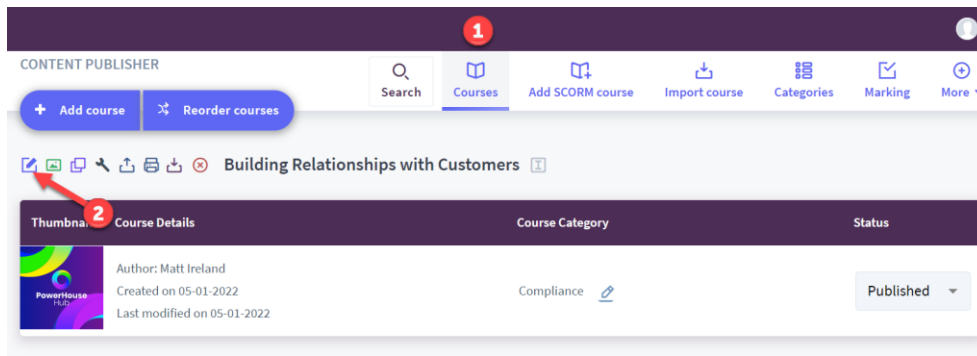
CPD Categories **15**

- Category 1
- Professional Reading
- New Category

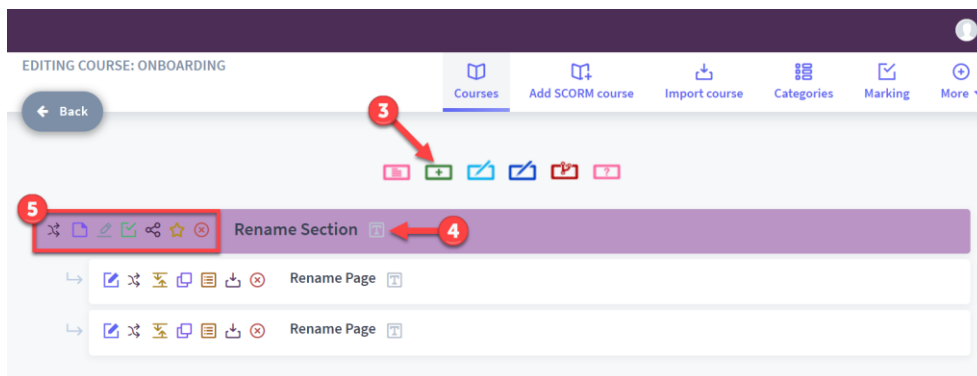
Cancel **16** Save

4.4.3 Building the course skeleton

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

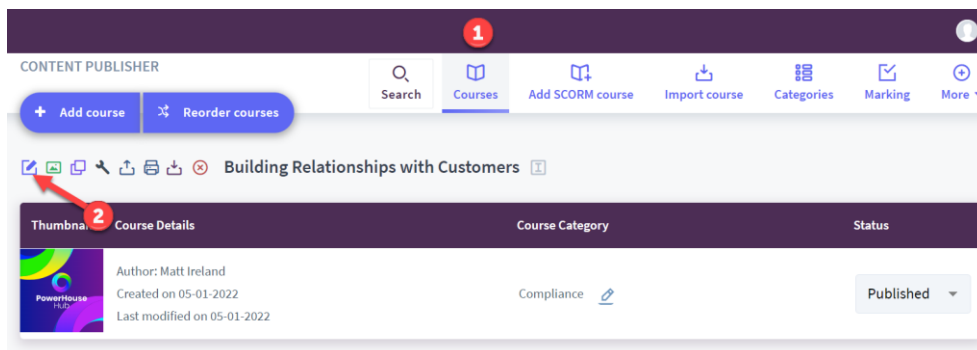


3. Click add section to add multiple sections
4. Click to edit the section name, enter the section name and then click the save icon
5. Use section icons to build the course section as required. Section icons include:
 - Re-arrange Items
 - Add Section Page
 - Add Section Practice Test - Practice tests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



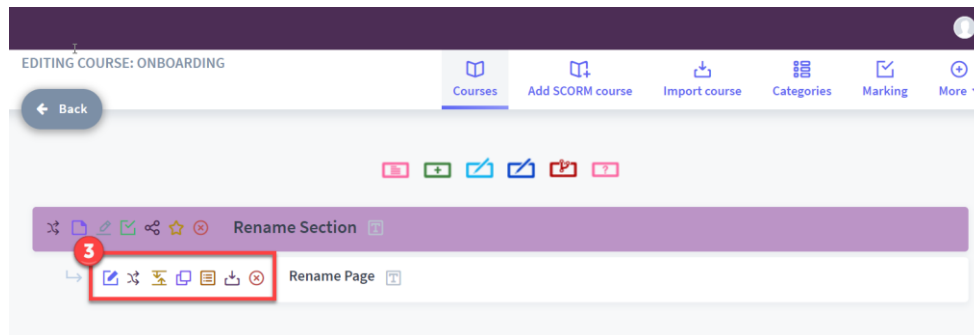
4.4.4 Course Actions Items

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



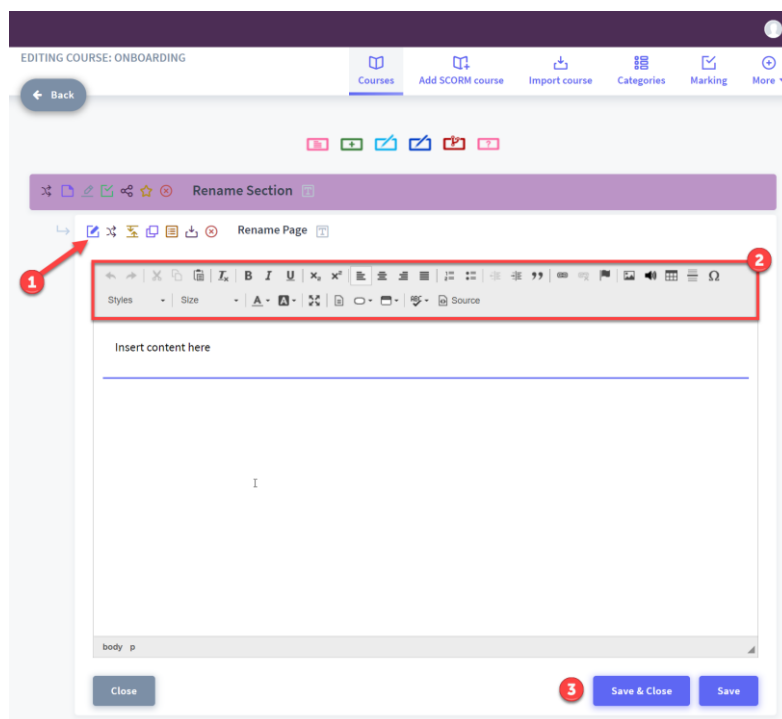
3. Use page icons to view your course. Page icons include:
 - Edit this page -insert templates and creative assets through the CK editor
 - Re-arrange items - re-order pages in the section
 - Move this page - move the page into another section

- 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



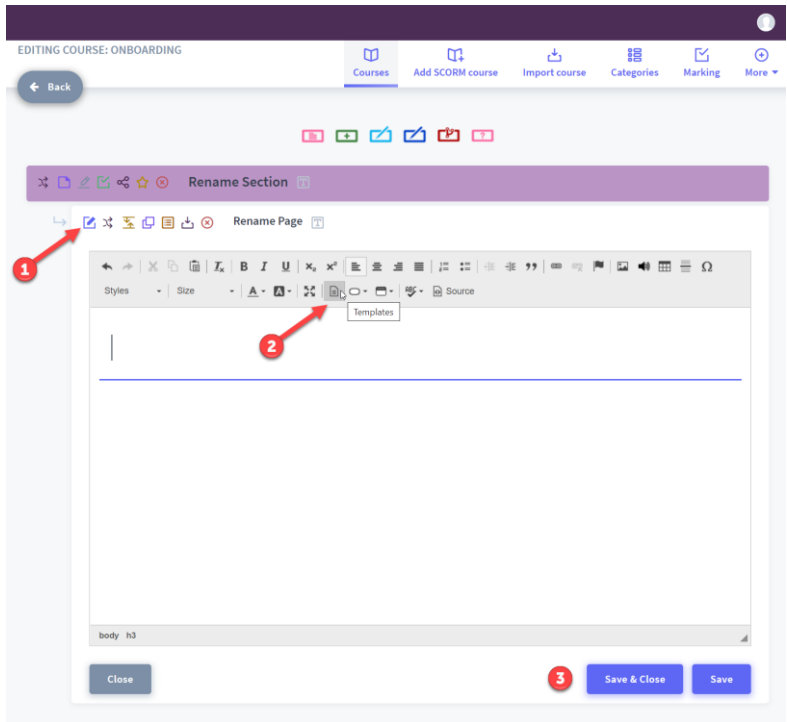
4.4.5 Creating Course Pages Using the CK Editor

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



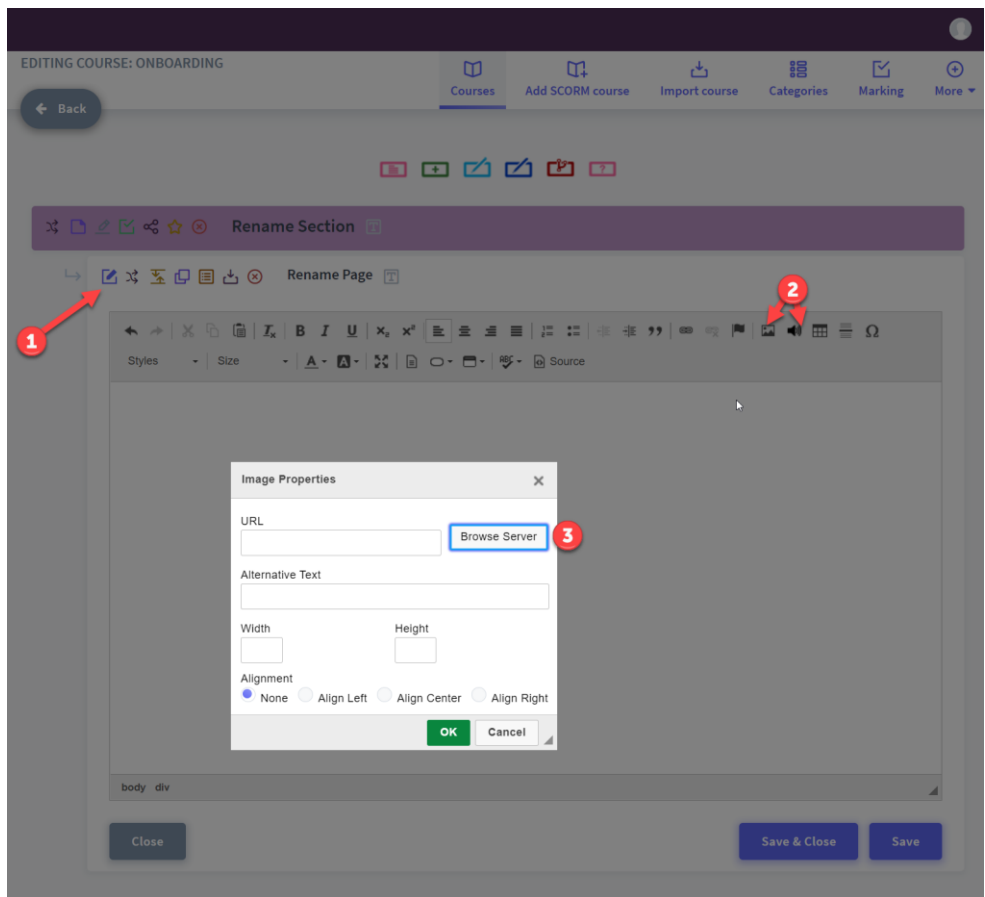
4.4.6 Creating Course Pages from a Template

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

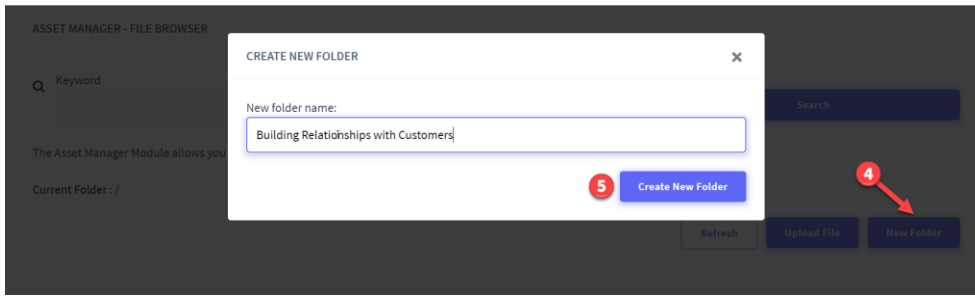


4.4.7 Uploading images and audio files

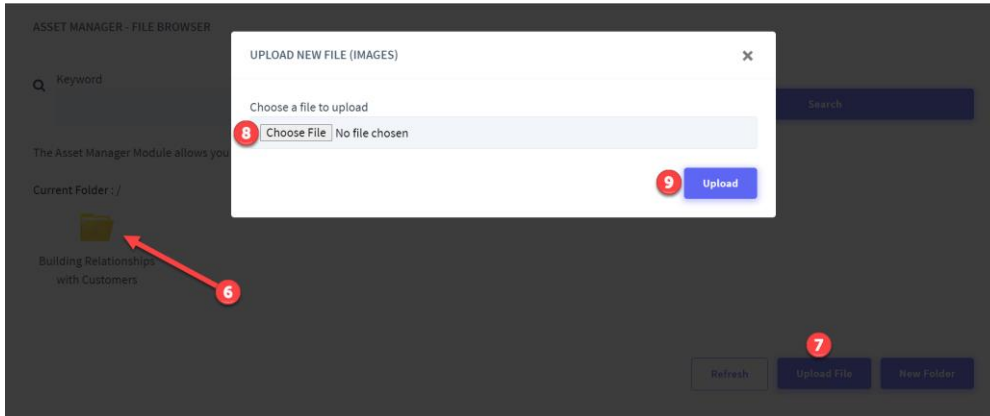
1. Click the edit this page icon
2. Click the image or audio button (depending on, which option you need)
3. Click Browse Server



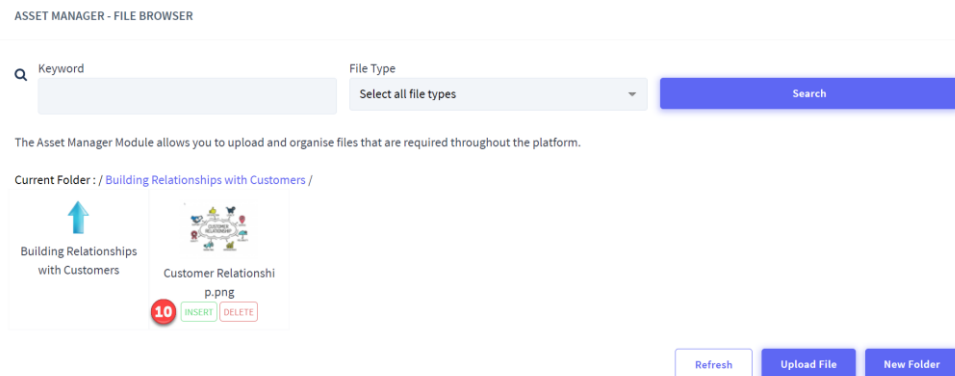
4. Click New Folder - it's best practice for each Course should have its on media folder.
5. Name the folder and click Create New Folder



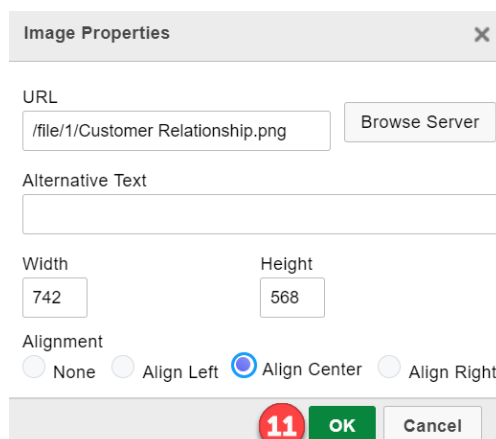
6. Click the new folder
7. Click Upload File
8. Click Choose File and select relevant file from your hard drive
9. Click Upload



10. Hover over file and click Insert

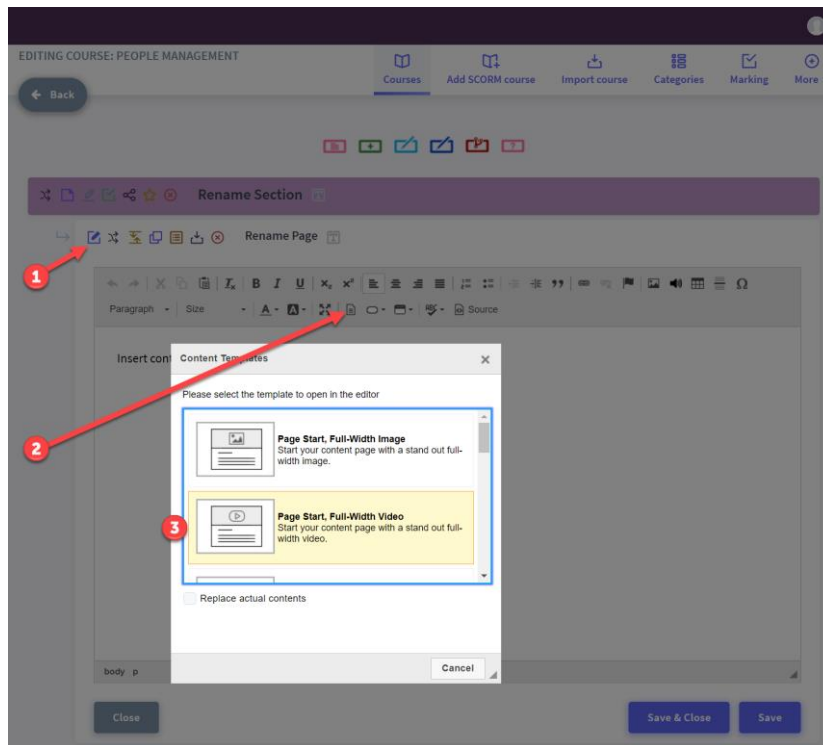


11. Select centre align and click OK

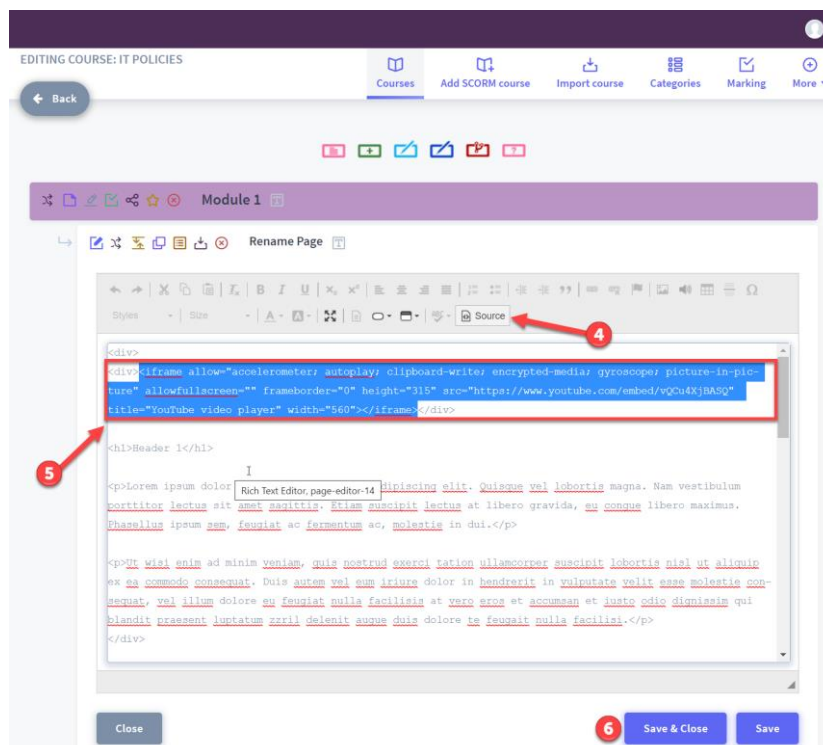


4.4.8 Adding a video

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



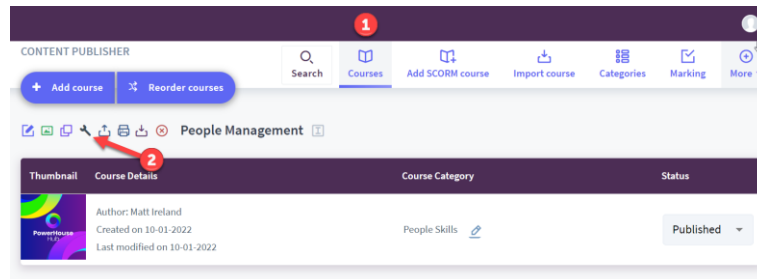
4. Click Source
5. Replace code between <div> and </div> tags with the embed code for the video that you would like to use (as highlighted in image)
6. Click Save & Close



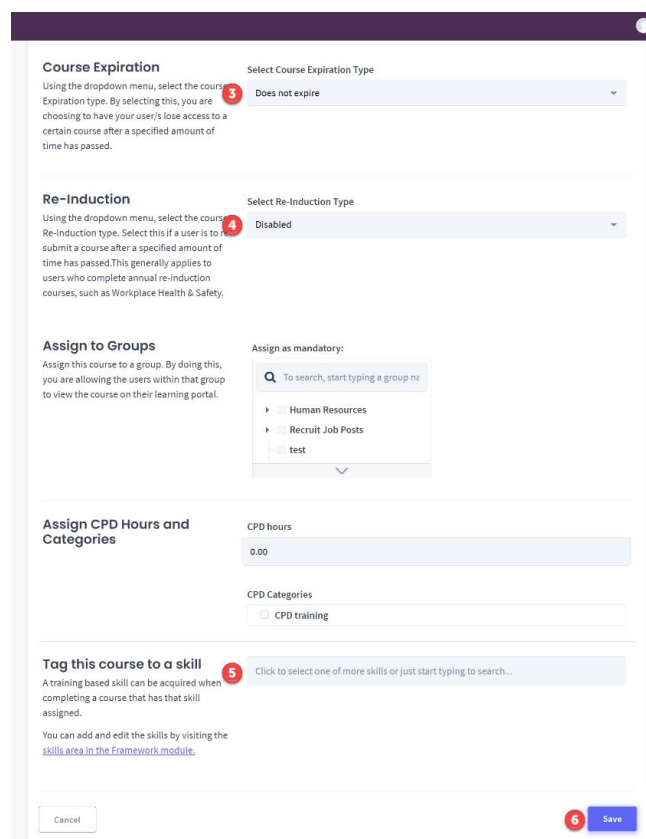
4.4.9 Course Settings

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

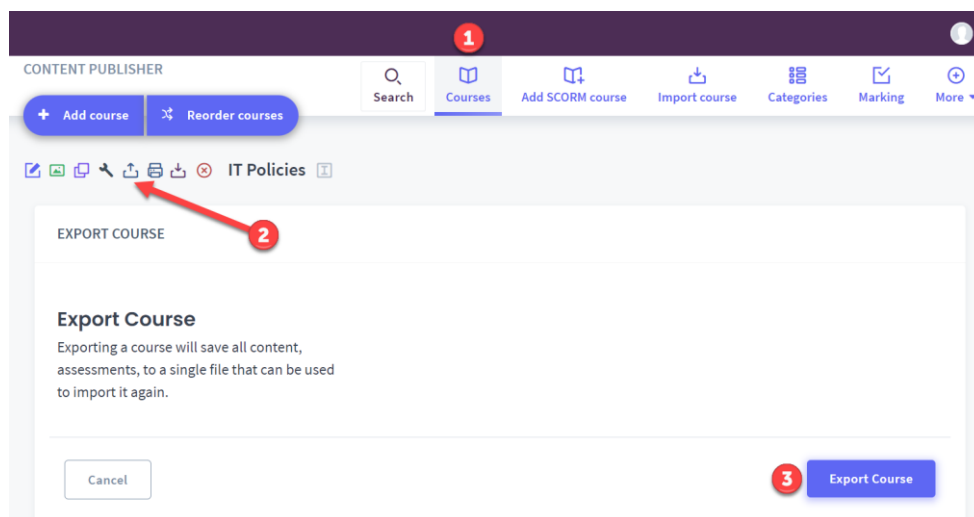


3. Using the dropdown menu, select the course Expiration type. By selecting this, your users will lose access to the course after a specified amount of time has passed.
4. Using the dropdown menu, select the course Re-Induction type. Select this if a user needs to re-submit a course after a specified 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 SCORM 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 won't 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

ADD SCORM COURSE

Basic Information
Add a SCORM course by entering the course title, the unique identifier, the SCORM version, and upload the SCORM file.

Course Title *

Course Unique Identifier Search keyword

Upload Scorm Object* No file chosen

Scorm Version *
 Scorm 1.2
 Scorm 2004 3rd Edition

Maximum file size is 500 Megabytes. Acceptable file type: (zip)

Open Scorm in new window
Check for the scorm to open in a popup window when workers access it.

Assign Certificate

Assign To Category

Training Time
 Hour(s) Minute(s)

Course Status

Send Managers an email and certificate copy when a Workers completes this course NO

Assign to Groups
Assign this SCORM course to a group. By doing this, you are allowing the users within that group to view the course on their learning portal.

Assign as mandatory:

 Human Resources
 Recruit Job Posts
 test

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

IMPORT COURSE(S)

IMPORT A NEW COURSE/S

Drag and drop files here....
 or...

 Maximum file size is 500 Megabytes

If you would like to assign a certificate to the course/s, please choose one from the list below.
 Assign Certificate

it_policies_7.3.zip

4.4.12 Marking

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

Submit Date	Mark	Worker (Learner) ID	Name	Assessment
22/07/2021		18	Sarah Cook	Sales Tactics and Approach Management_ Showcase - Assessment
22/07/2021		11	Jason Holmes	Sales Tactics and Approach Management_ Showcase - Assessment
22/07/2021		15	Rayna Greenburg	Sales Tactics and Approach Management_ Showcase - Assessment
07/07/2021		13	Stacey Phipps	Sales Tactics and Approach Management Test 1 - Assessment

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

Q1	Q2	Q3	Q4
<p>It is best practice to wine and dine your potential clients in order to make a sale.</p> <p>User Answers : False</p> <p>Correct Answers : False</p>	<p>You are a sales rep seeking to build your portfolio. What is the first step you would take to build your network? Choose the most relative response.</p> <p>User Answers : b) Review your current business strategy and tailor your approach based off successful business development currently used.</p> <p>Correct Answers : b) Review your current business strategy and tailor your approach based off successful business development currently used.</p>	<p>Why aren't you able to wine and dine clients to achieve an outcome?</p> <p>User Answers : Naughty</p> <p>Correct Answers : It is not best practice to constantly be using business funds to achieve outcomes, based on this hitting your bottom line, prior to a potential return on investment.</p>	<p>What is the correct order for a sales pitch and outcome?</p> <p>User Answers :</p> <p>Correct Answers :</p>
User Answer is : Correct	User Answer is : Correct	User Answer is : 3 Select value	User Answer is :

Send notification to 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

SYSTEM SETTINGS

Global Registration/Forms Security

Homepage Template

Change the home page template.

Homepage Template

Visitor

Recruit integration

Redirect all home page visitors to the Communities homepage instead NO

Username Settings

Modify the behaviour of user forms.

Automatically generate a suggested username in "firstname.lastname" format NO

Force the user to use the suggested username NO

Allow managers to modify usernames NO

Allow businesses to modify usernames NO

Cookie Policy

You can provide your own cookie policy if you're not happy with the default version. A cookie policy is required for all sites and cookies must be allowed by the end-user in order to login and/or access any part of this platform.

B I |

We use cookies to collect and analyse information to give you the best experience on our website. If you continue, we'll assume that you are happy to receive all cookies on the website. To find more about our cookie use, see our [Privacy Policy](#).

Course Settings

1. Enable or disable the ability for admins to export a course to PDF that can then be distributed to workers.

2. Enable or disable the ability for admins to mark courses as complete for worker, candidate and visitor user types. **Note:** This is done in the [User Account](#) area

Enable PDF Export YES

Allow courses to be 'auto-marked' by Admin NO

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

TRAINING PLANS

Search List Plans Reorder Plans

+ Add Training Plans 1

Start grouping your courses

Training Plans allow you to bind courses together with the option to enforce prerequisites to allow for foundational knowledge building. Start grouping your courses together by selecting the Add Program button.

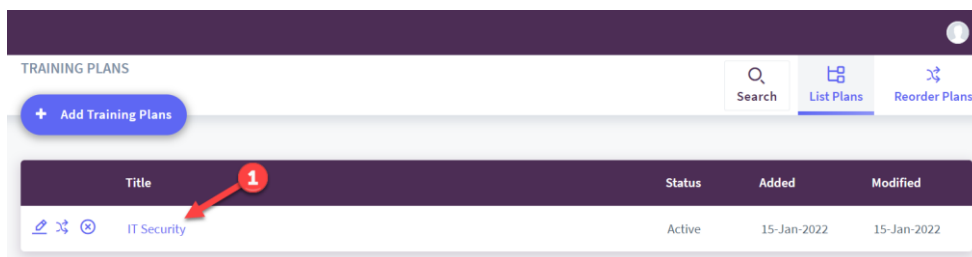
2. Add a title for the training plan
3. Select a recommended timeframe that you would like the learner to complete the training plan in
4. Click choose file to upload an image from your hard drive
5. Assign a certificate
6. Toggle Yes to show the certificate on the learner dashboard once awarded
7. Toggle 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

The screenshot shows the 'ADD TRAINING PLAN' form with the following sections and callouts:

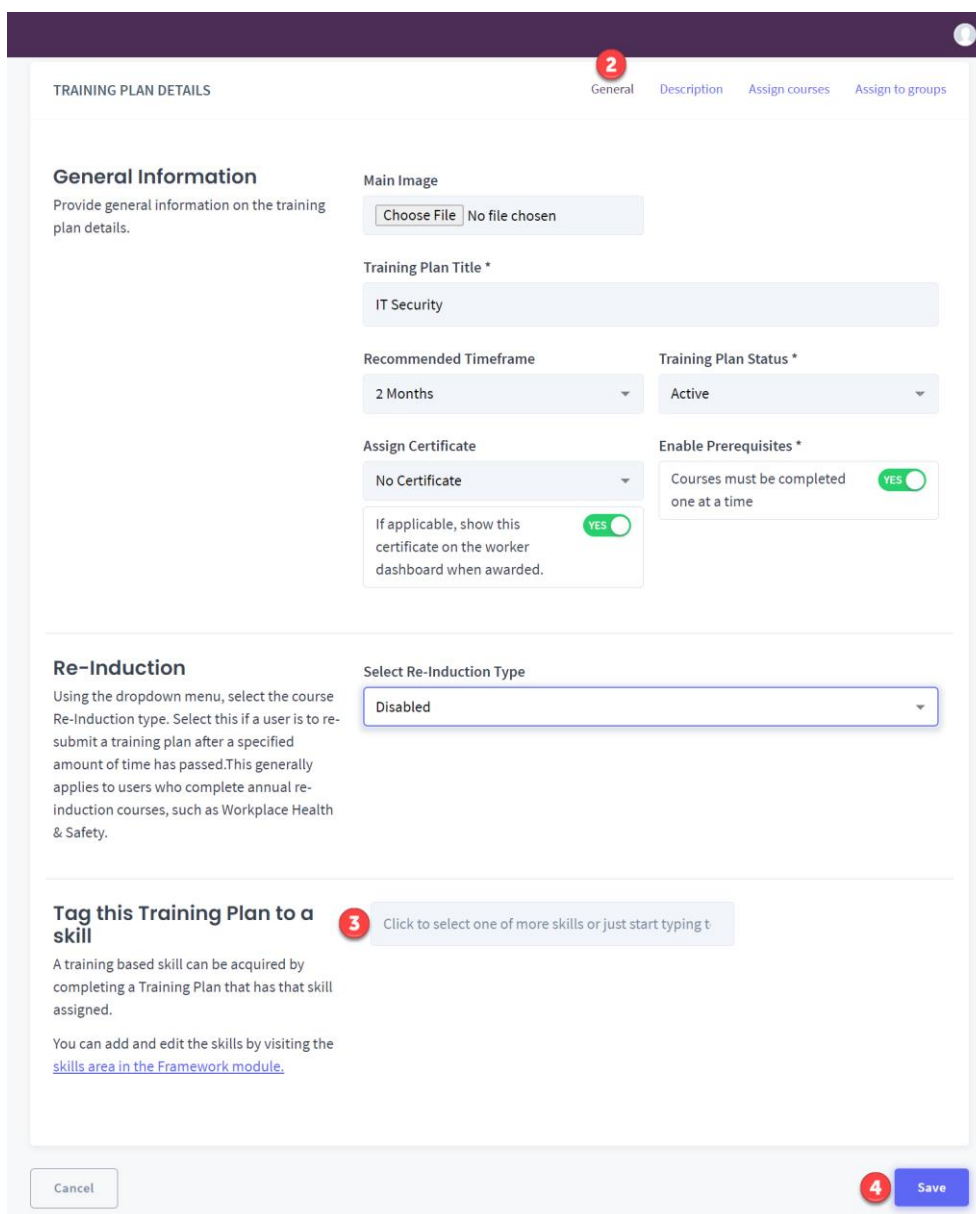
- Training Plan details:**
 - 2. Training Plan Title *
 - 3. Recommended Timeframe (dropdown menu)
 - 4. Main Image (Choose File button)
 - 5. Assign Certificate (dropdown menu)
 - 6. If applicable, show this certificate on the worker (learner) dashboard when awarded. (toggle)
 - 7. Enable Prerequisites * (Courses must be completed one at a time toggle)
- Re-Induction:**
 - 8. Select Re-Induction Type (dropdown menu, currently set to 'Enabled, Re-induct Annually')
 - Induction Date (10/01/2023)
 - Reset Induction (toggle)
 - Induction Reminders (1 month before, 1 week before, 1 day before, On the day - all with YES toggle)
- Description:**
 - 9. Summary (text area)
 - 10. Description (rich text editor)
- Buttons:**
 - Cancel (bottom left)
 - 11. Save (bottom right)

4.5.2 Tagging a skill to a training plan

1. Click the training plan title

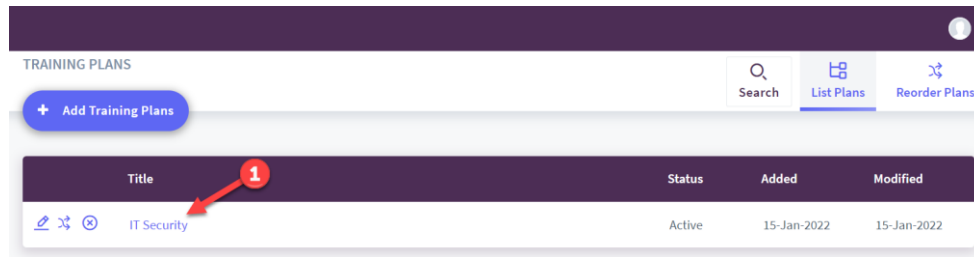


2. Click the general link
3. Type in the skill(s) the learner will achieve after completing the training plan
4. Click Save to save changes

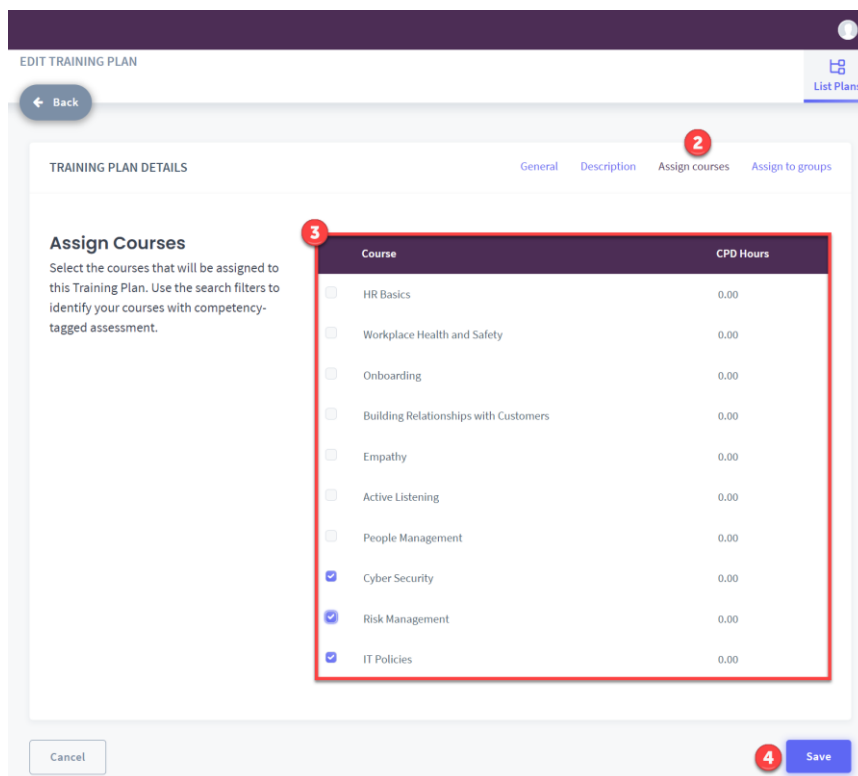


4.5.2 Assign Courses

1. Click the training plan title

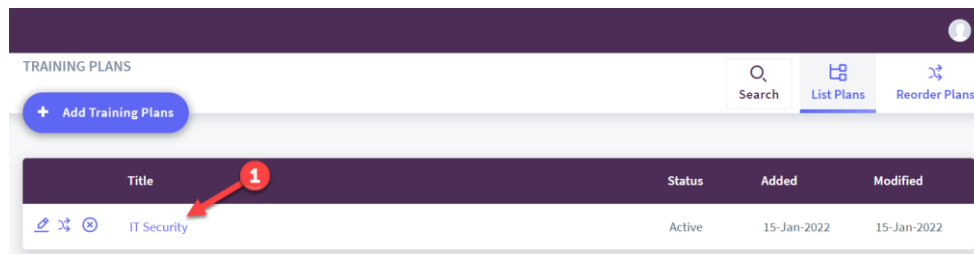


2. Click the Assign courses link
3. Select the course(s) that will be assigned to the training plan
4. Click Save to save changes

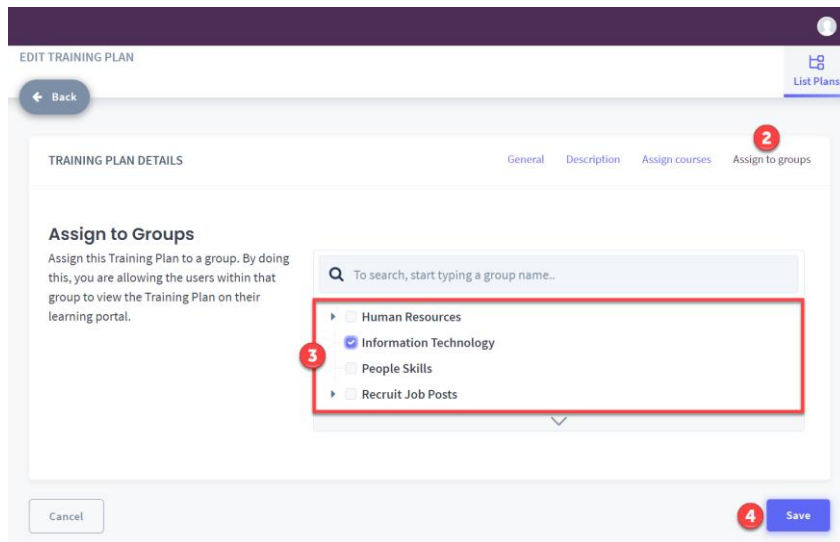


4.5.3 Assign Training Plan to Groups

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



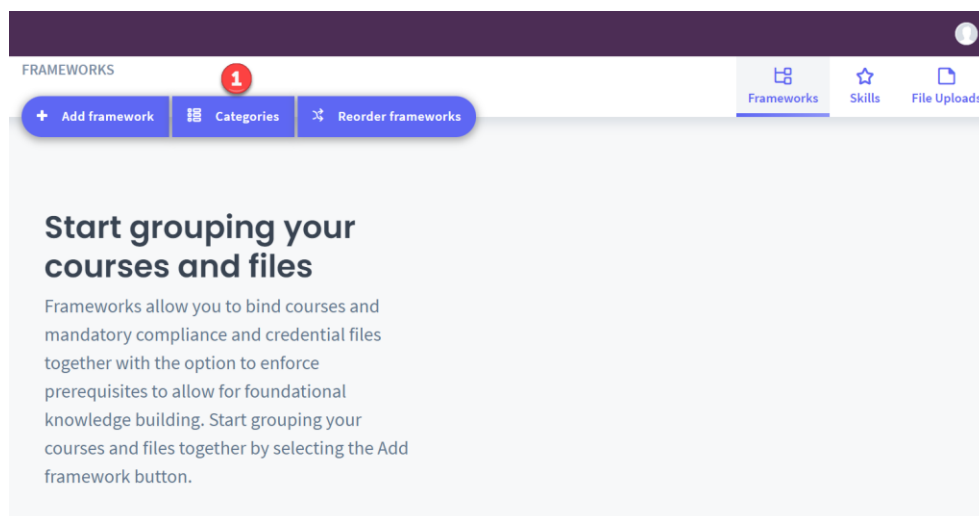
4.6 Framework Manager

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

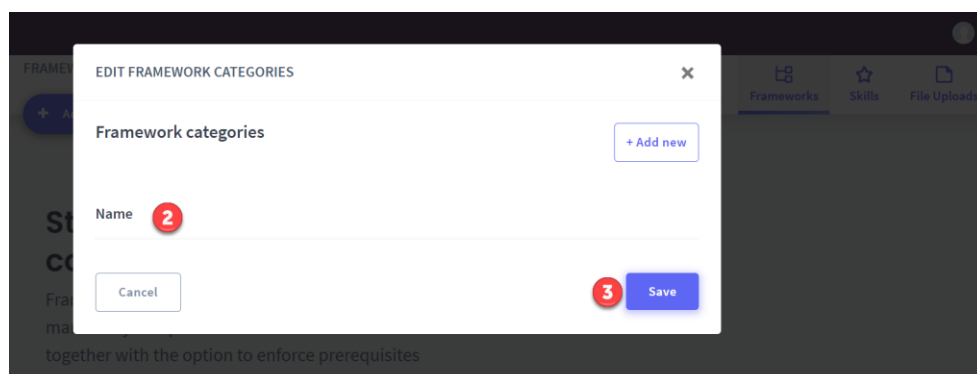
Before building a framework you will need to make sure you have already created the required training courses and the required file uploads (skill evidence, compliance, credentials and vaccination).

4.6.1 Adding a category

1. Click the categories button

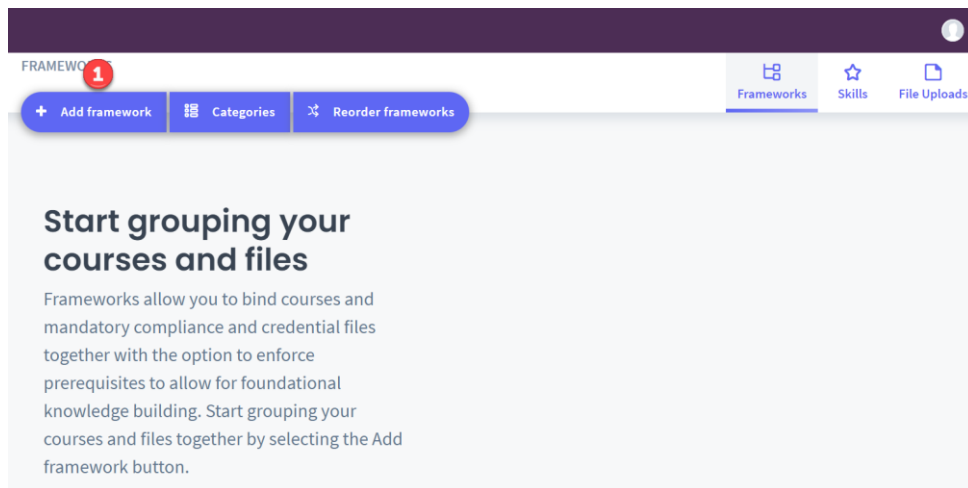


2. Enter the category name
3. Click Save to save changes

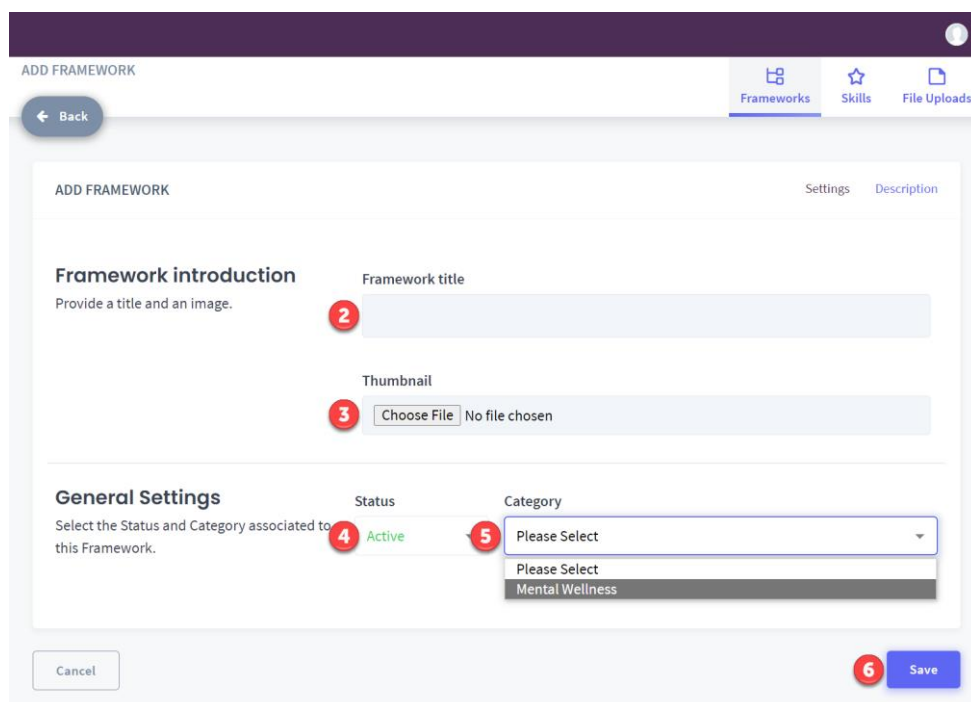


4.6.2 Adding a framework

1. Click Add framework



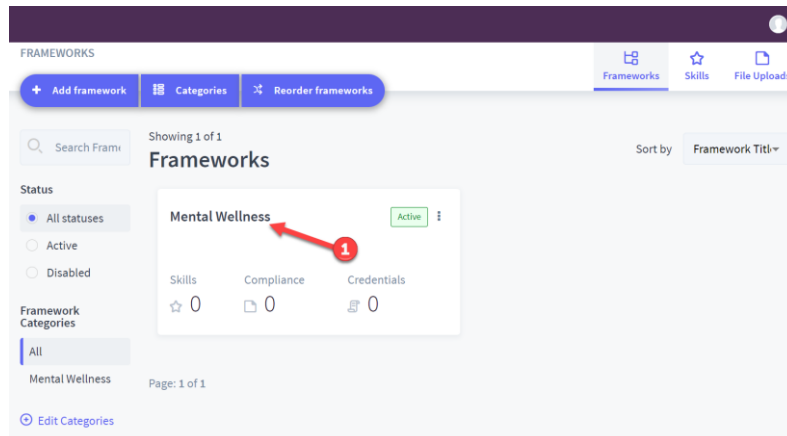
2. Add the framework title
3. To upload a thumbnail for the framework, click choose file and upload an image from your hard drive
4. Set the status. Active means the framework is live and ready for learners to complete. Disabled means the learner won't be able to see on their portal
5. Select the category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



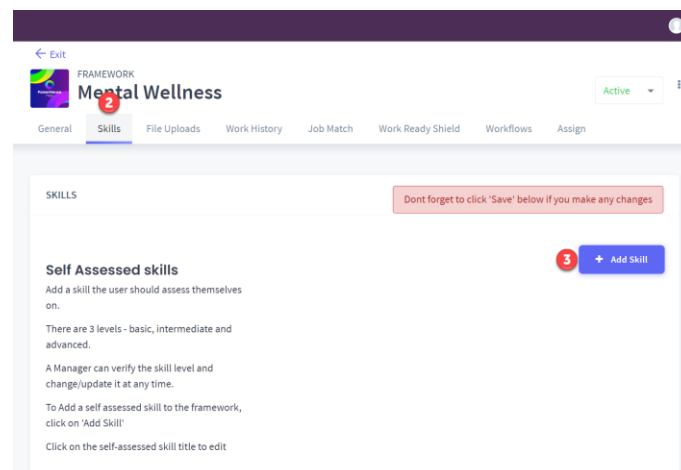
4.6.3 Skills

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

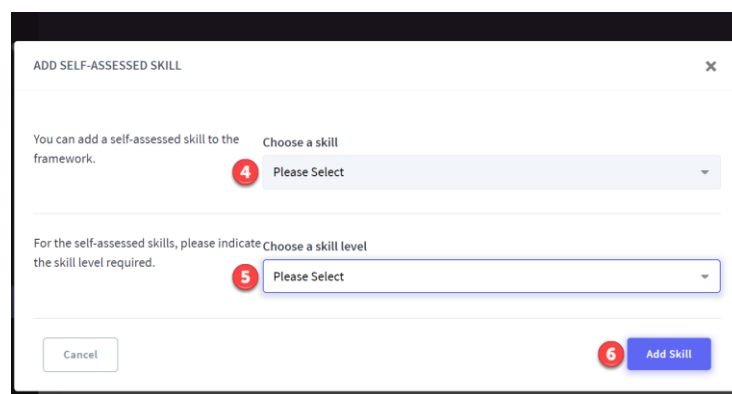
1. Click on the Framework title



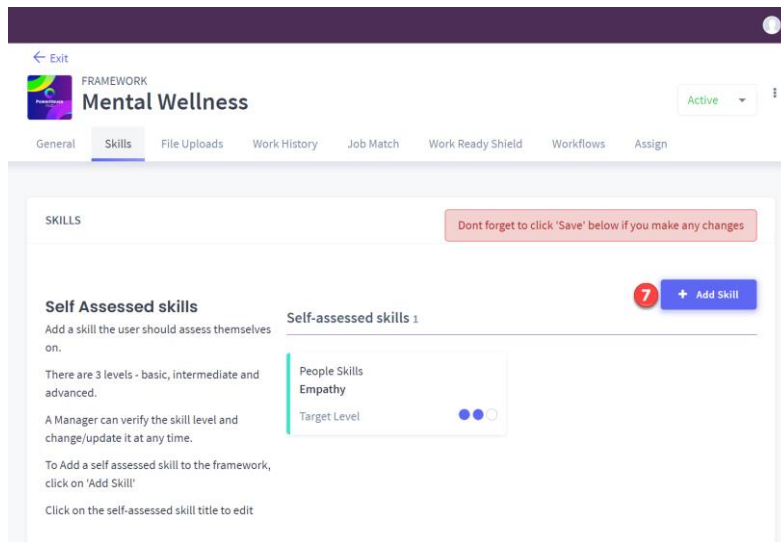
2. Click on the Skills tab
3. Click Add skill to add a self assessed skill. This is where the user can assess themselves against a desired skill (basic, intermediate and advanced). A Manager can verify the skill level and change/update it at any time.



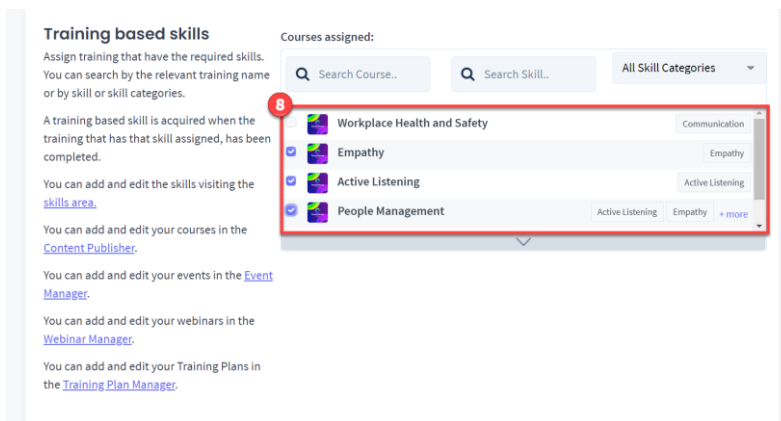
4. Choose a skill that the learner can self assess against
5. Set the skill level that you require for this position
6. Click add skill



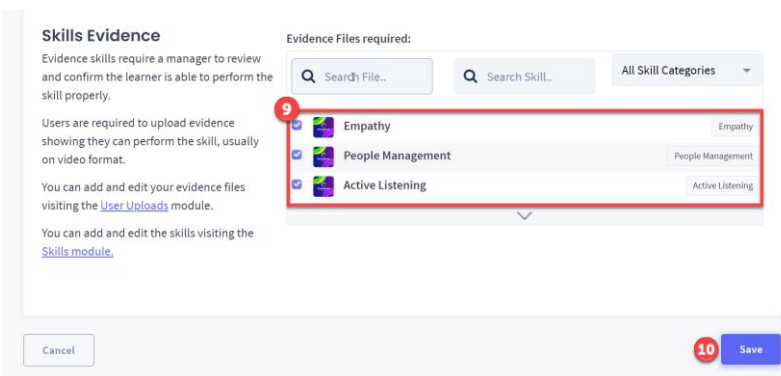
7. To add further skills, click add skill again



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 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

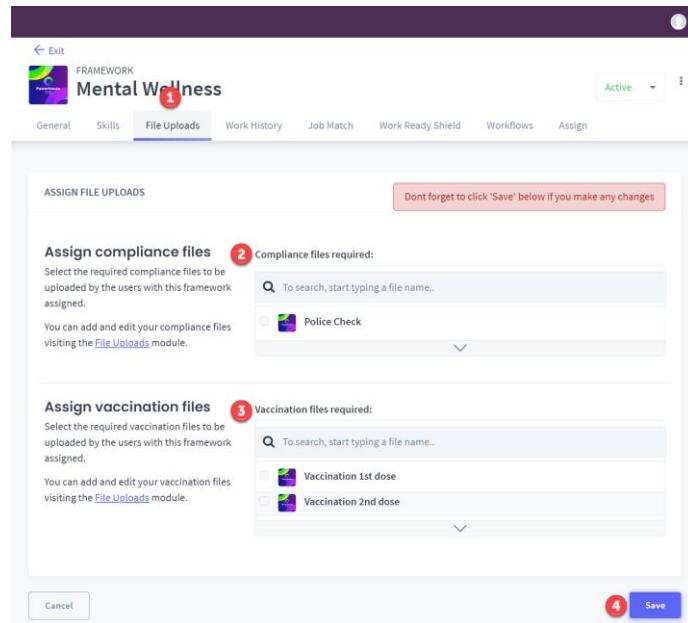


4.6.4 File Uploads

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

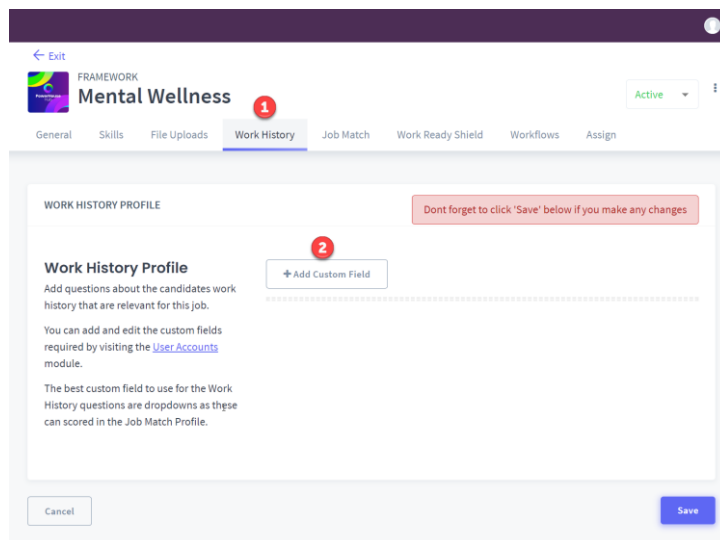
3. Select the required vaccination files required for the role
4. Click Save to save changes



4.6.5 Work History

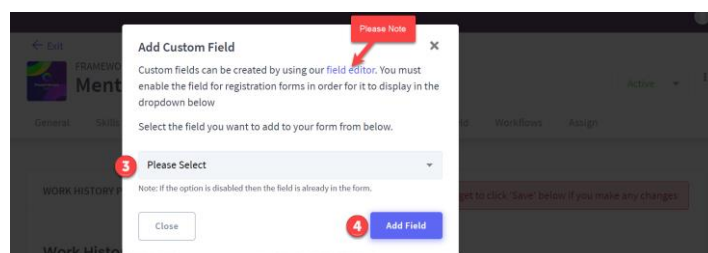
In this section you can add questions about the candidate’s work history.

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

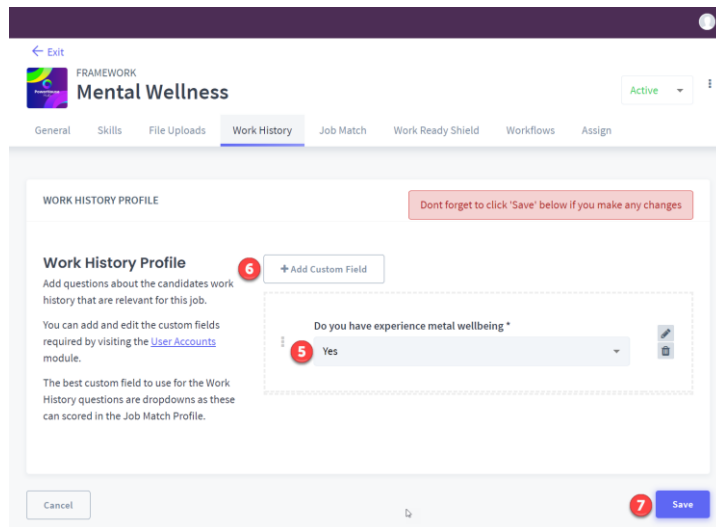


3. Select the question that you want to add from the drop down box
4. Click add field

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



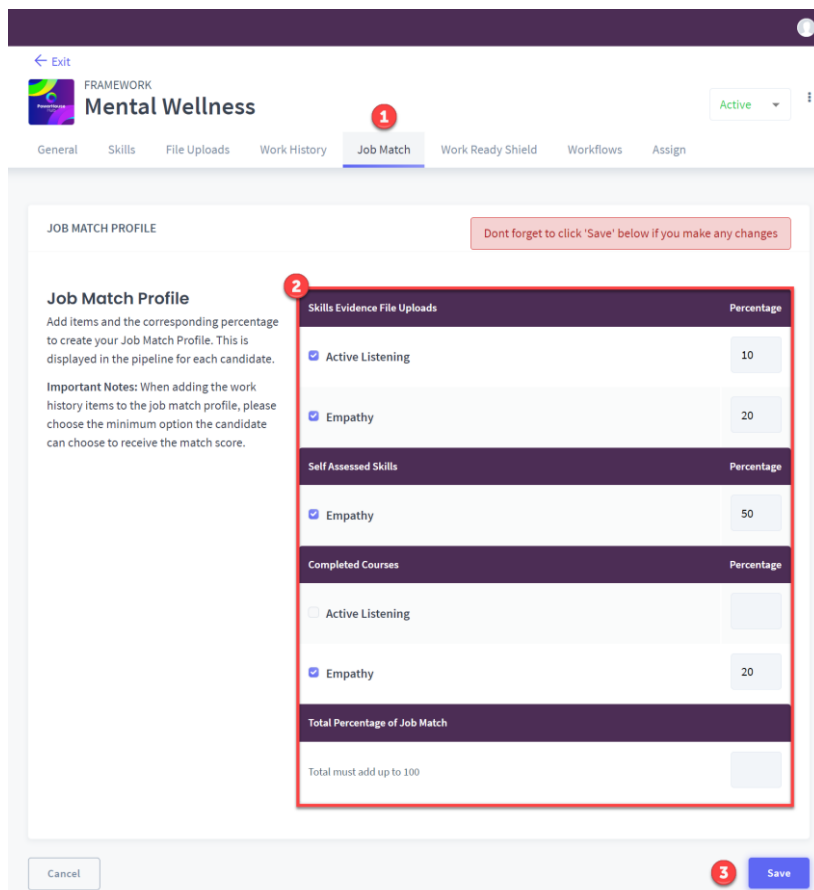
- Choose the required answer from the drop down box
- Click add custom field to add multiple questions
- Click Save to save changes



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.

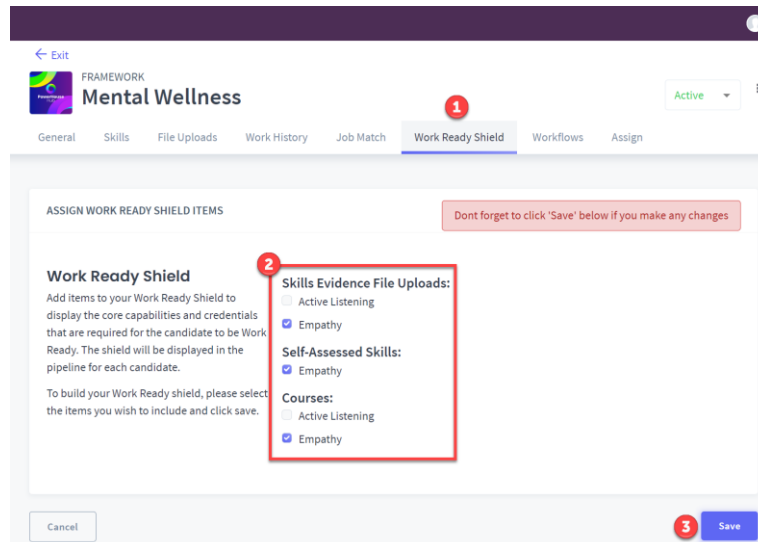
- Click the Job Match tab
- Select the items you would like in your Job Match and rate the importance as a percentage. All selected items must add up to 100%
- Click Save to save changes



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.

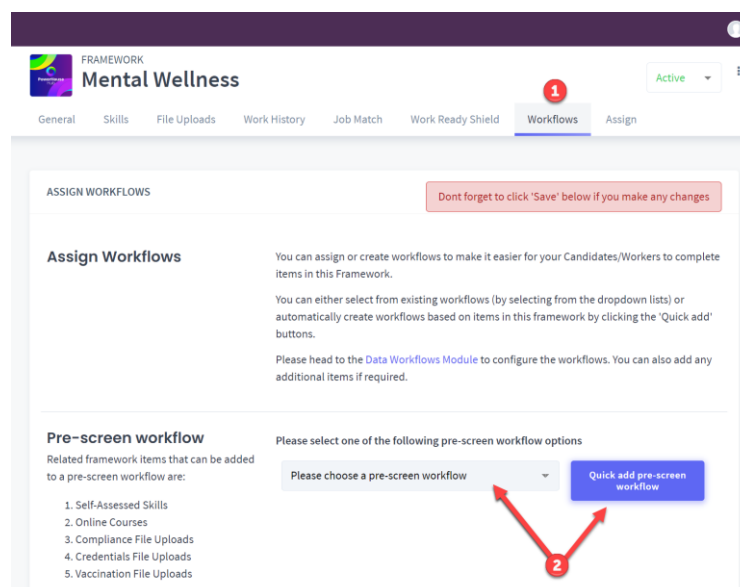
1. Click the Work Read Shield tab
2. Select the items you require for the candidate to be ready for work
3. Click Save to save changes



4.6.8 Workflows

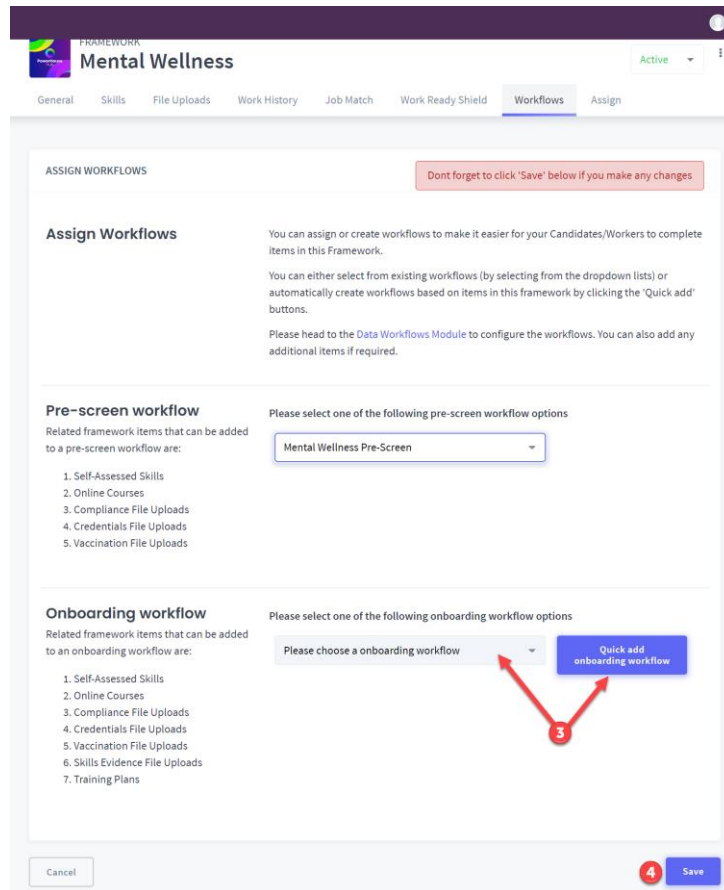
You can assign or create workflows to make it easier for your Candidates/Workers to complete items in this Framework. You can either select from existing workflows (by selecting from the dropdown lists) or automatically create workflows based on items in this framework by clicking the 'Quick add' buttons.

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



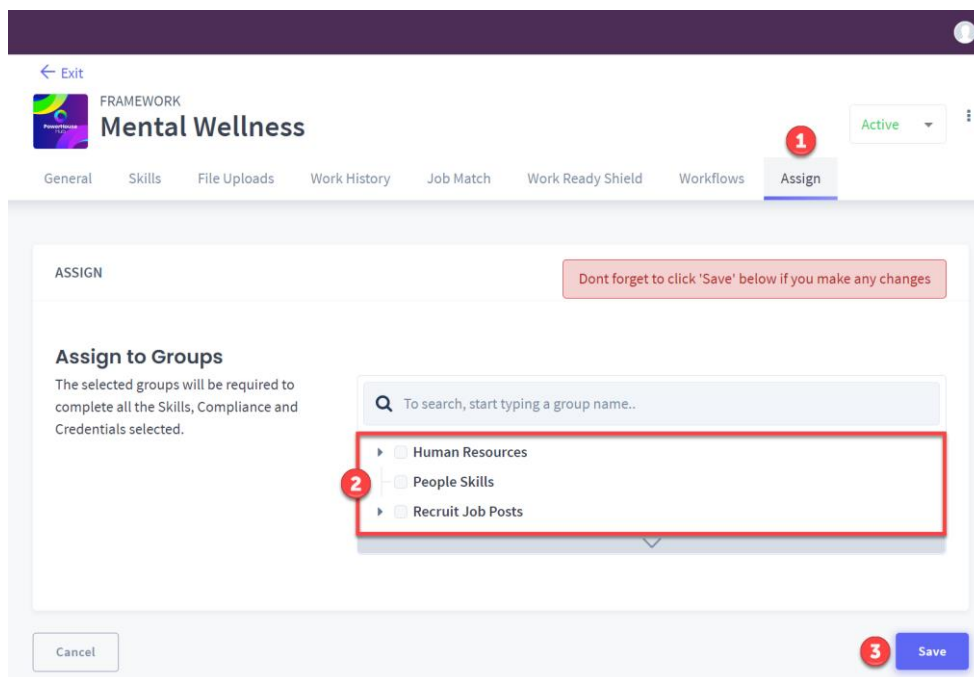
3. Select a pre-existing onboarding workflow from the job down box or click Quick add onboarding workflow

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.

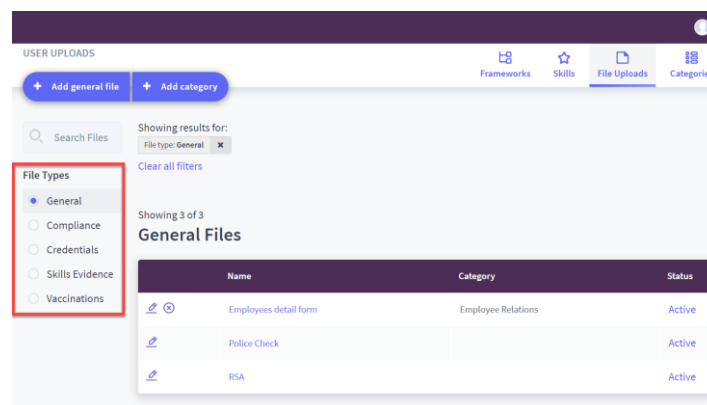
Best practice in building your foundation, is to ensure the Skills module is populated with relevant skills. It's important for you to have a full list of skills populated prior to adding Skills Evidence within File Uploads, as the Skills module allows candidates to provide evidence toward a certain 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

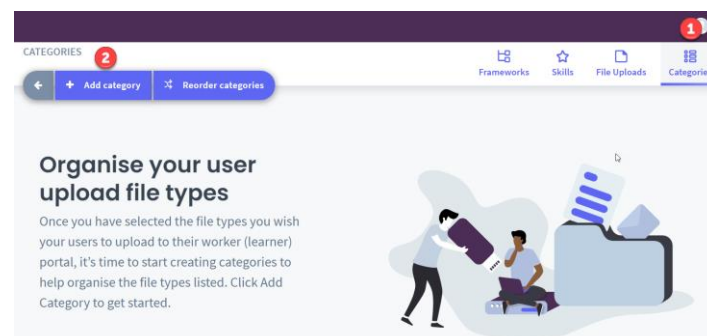
All these file types help candidates build their professional workforce wallet, ensuring best suitability for employment.



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

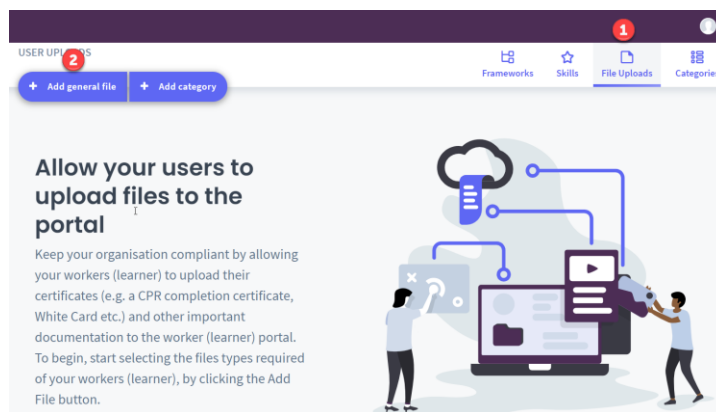


3. Add a category title
4. Set the status. **Active:** Category is live on the platform and users can upload their certificates.
Disabled: Category cannot be seen on the platform.
5. Click Save to Save changes

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

Name	Category	Status
Employees detail form	Employee Relations	Active
Police Check		Active
RSA		Active

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

Name	Assigned skills	Status
Project Management Courses	Project Management	Active

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

The screenshot shows the 'ADD FILE - EVIDENCE' form with the following sections and callouts:

- File details:**
 - File Name *** (4): A text input field.
 - File Status*** (5): A dropdown menu currently set to 'Enabled'.
 - Summary** (6): A large text area for providing a summary, with a character count of '0 / 300'.
- File Settings:**
 - Expiry Date Required** (7): A toggle switch currently set to 'NO'.
 - Manager should advise that they have viewed the original document** (8): A toggle switch currently set to 'NO'.
- Assign to Groups:**
 - A search bar with the placeholder 'To search, start typing a group name..'.
 - A list of groups with checkboxes: 'Human Resources', 'Recruit Job Posts', and 'test'. The 'Recruit Job Posts' group is highlighted with a red box and callout (9).
- Tag this evidence file to a skill** (10): A search bar with the placeholder 'Click to select one of more skills or just start typing to search..'.

At the bottom of the form, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red circle and callout (11).

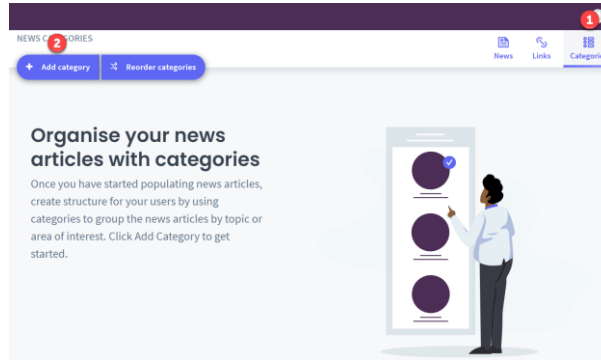
5. Communication

5.1 News Manager

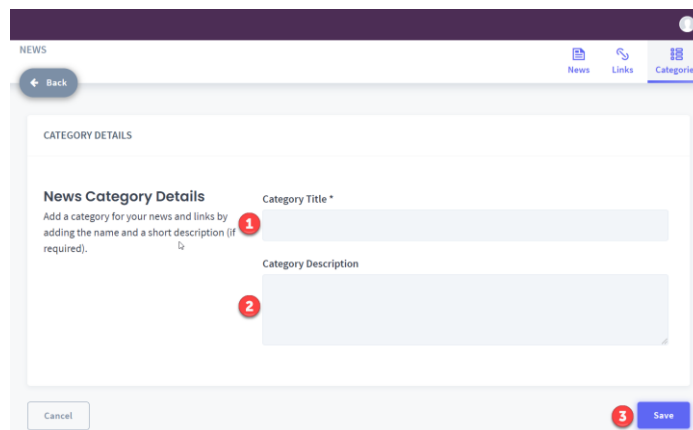
Broadcast company updates and announcements to your users through the News Editor. You can also choose to email updates to your staff with the click of a button. Simply write your news update, consider adding relevant links or images, then assign it to user groups.

5.1.1 Adding a News Category

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

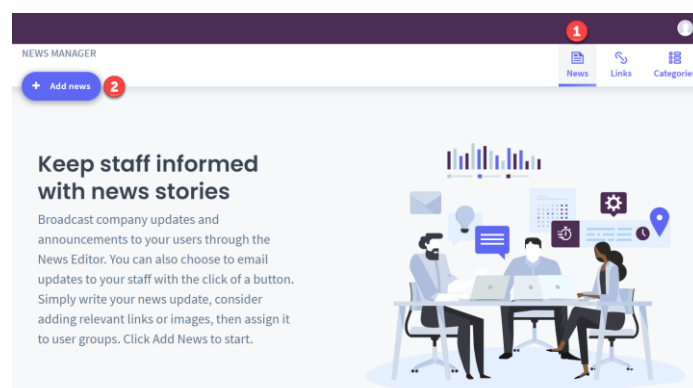


3. Add a category title
4. Add a description
5. Click Save to save changes

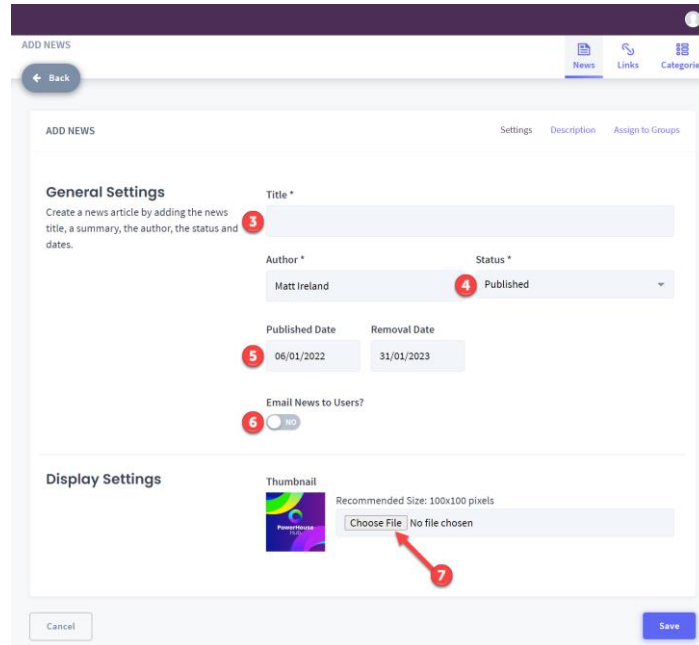


5.1.2 Add News

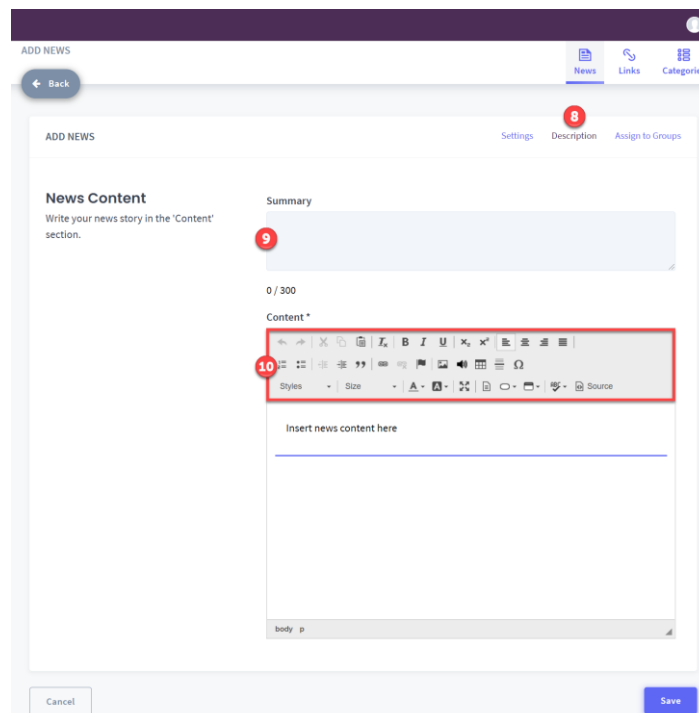
1. Click on the News tab
2. Click Add news



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

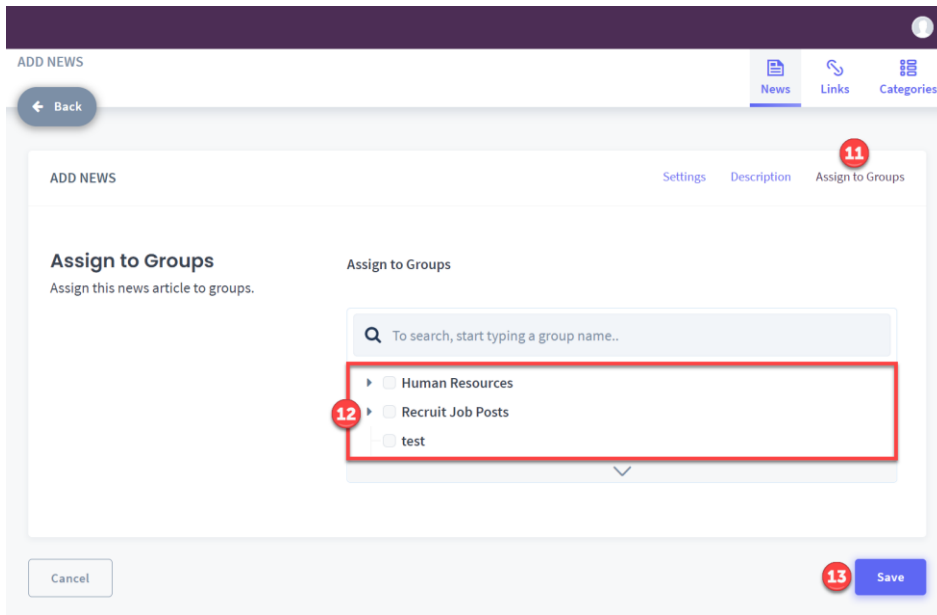


8. Click the Description link
9. Add a summary
10. Add content using CK Editor options to make the article engaging



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

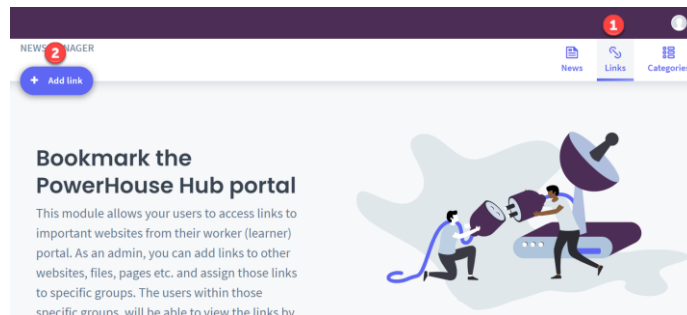
13. Click Save to save changes



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

EDITING LINK

News Links Categories

← Back

LINK DETAILS

Basic Link Information
Provide the full URL (including the "http://") for the link you wish to include.

Link Title *
3 Contact Us

Link URL *
4 https://www.powerhouseworkforce.com/contact-us/

General Settings
Provide the general settings of the link, including the author and status.

Author *
Matt Ireland

Status *
Published 5

Date Range
Add the published and removal dates.

Published Date
6 07/01/2022

Removal Date
07/01/2023

Assign Link
Assign this link to groups.

Assign to Groups

To search, start typing a group name..

- 7 Human Resources
- Recruit Job Posts
- test

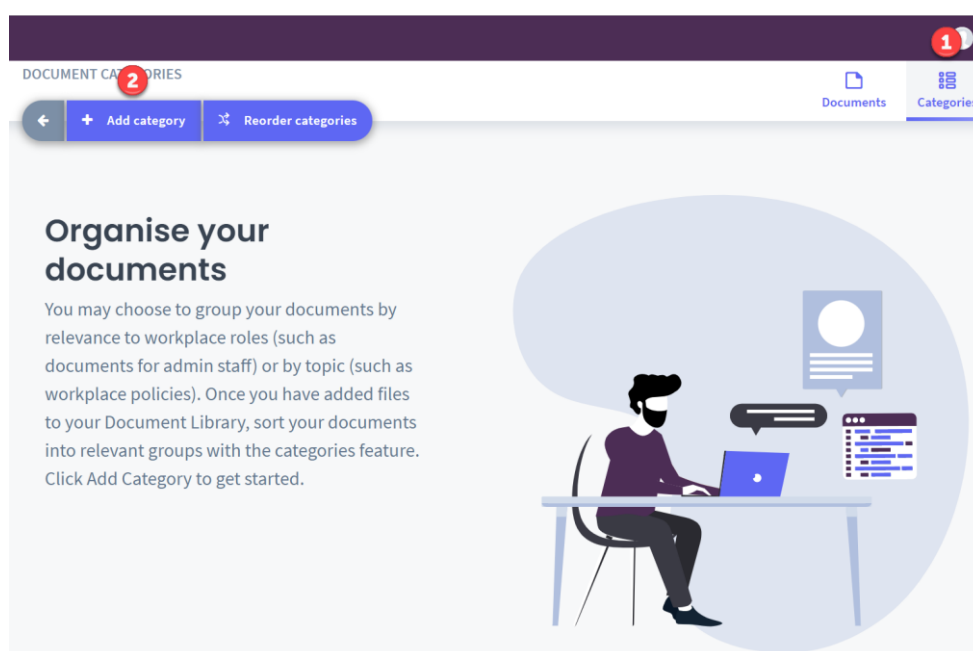
Cancel Save 8

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

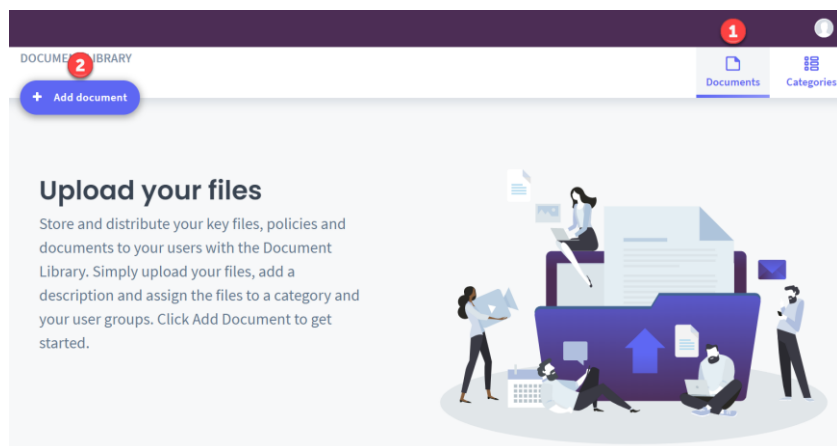
1. Click on the Categories tab
2. Click Add category



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

ADD DOCUMENT

Document Settings
Add a document by adding the document name, uploading the file and adding a description.

Document Name *

Select File *
Maximum file size is 500 Megabytes
Choose File No file chosen

Description

Category

Publish Date * 06/01/2022 Removal Date dd/mm/yyyy Status * Active

Assign to Groups
Assign groups to your document. This document will show on the workers dashboard for users in the selected group(s).

To search, start typing a group name..

- Human Resources
- Recruit Job Posts
- test

Cancel Save

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

DOCUMENT LIBRARY

+ Add document

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Document Title	Uploader	Added on	Status
Annual Leave Request Form	Matt Ireland	13-Dec-2021	Active

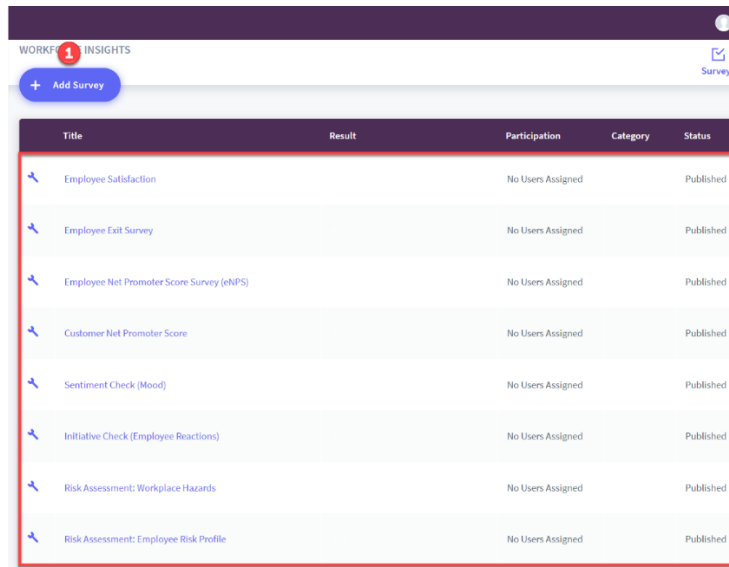
5.3 Workforce insights

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.

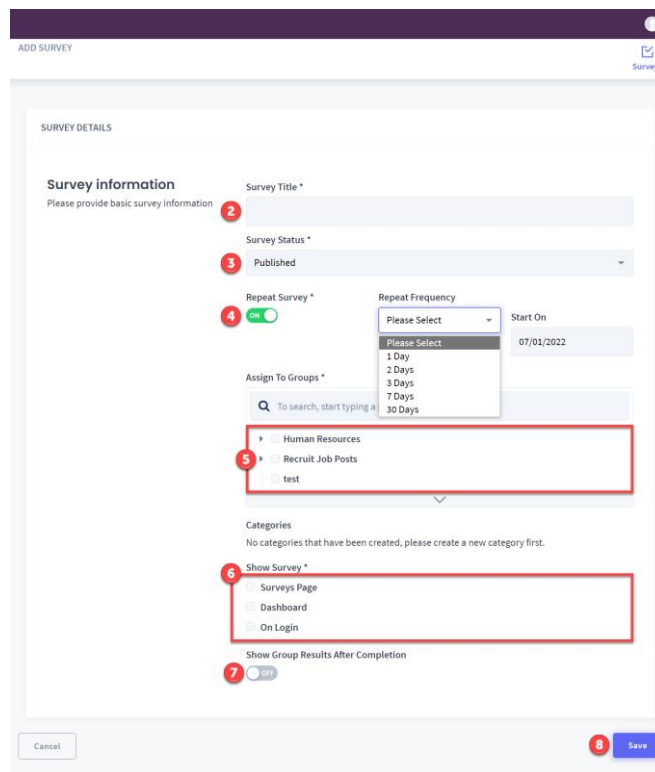
5.3.1 Adding a survey

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

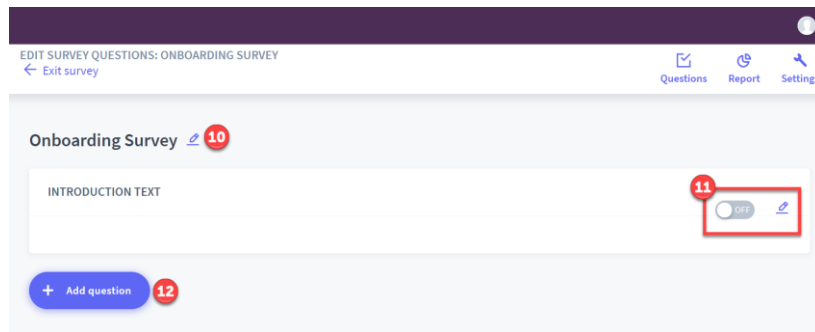


10. Click to edit title

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

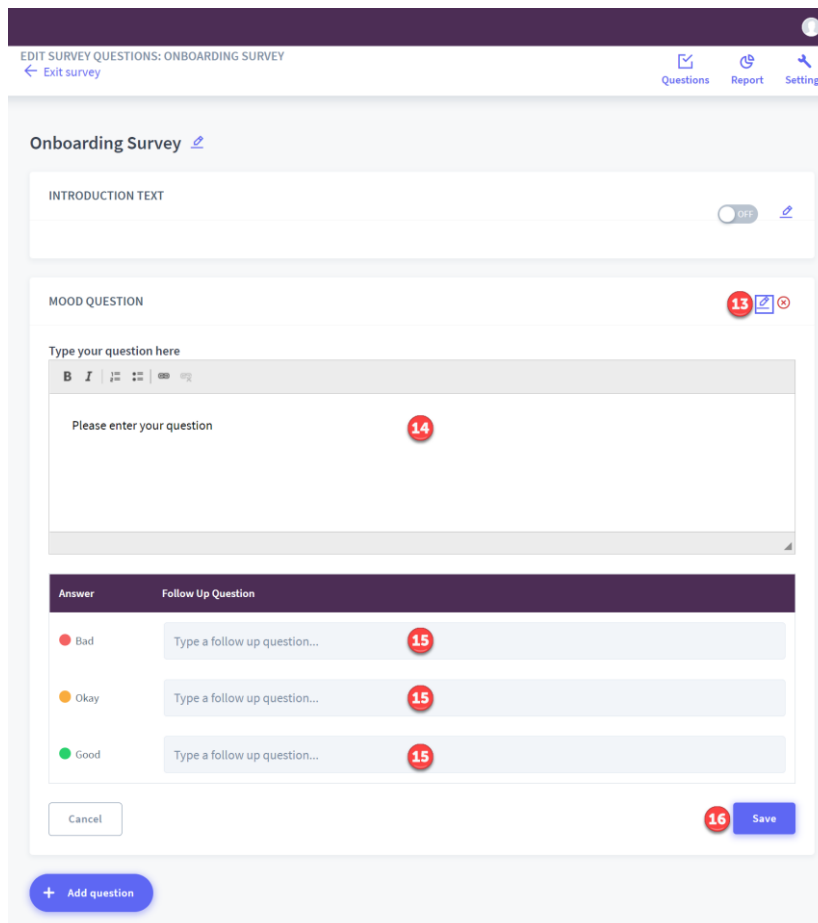


13. Click to edit question

14. Click to type your question

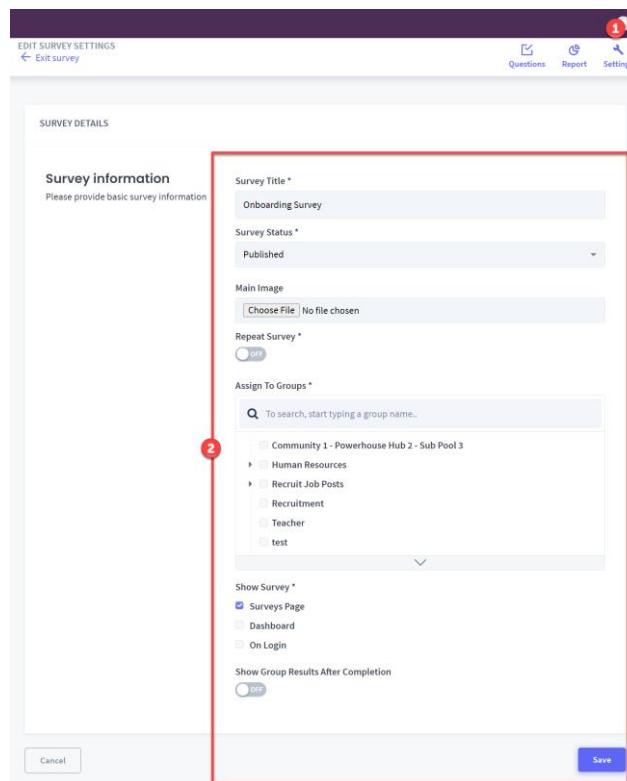
15. Type your follow up question for the three answers. This will be seen by the learner after they have answered the question

16. Click Save and then add as many questions as needed to complete the survey



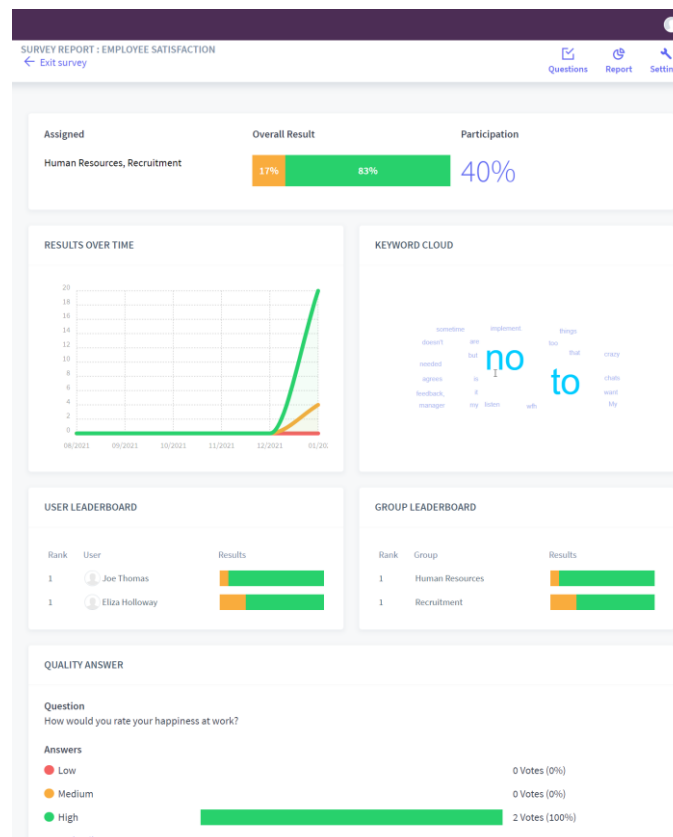
5.3.2 Settings

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



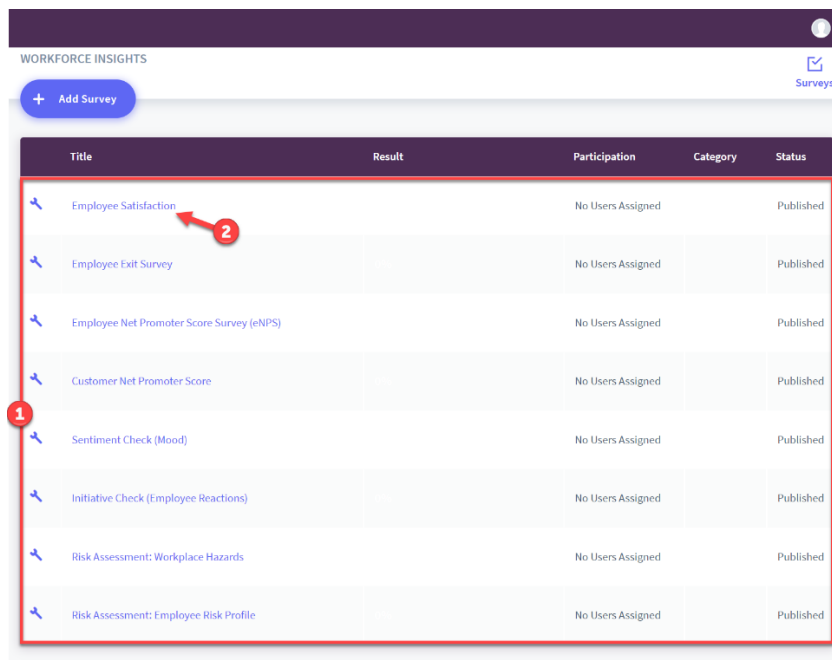
5.3.3 Report

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

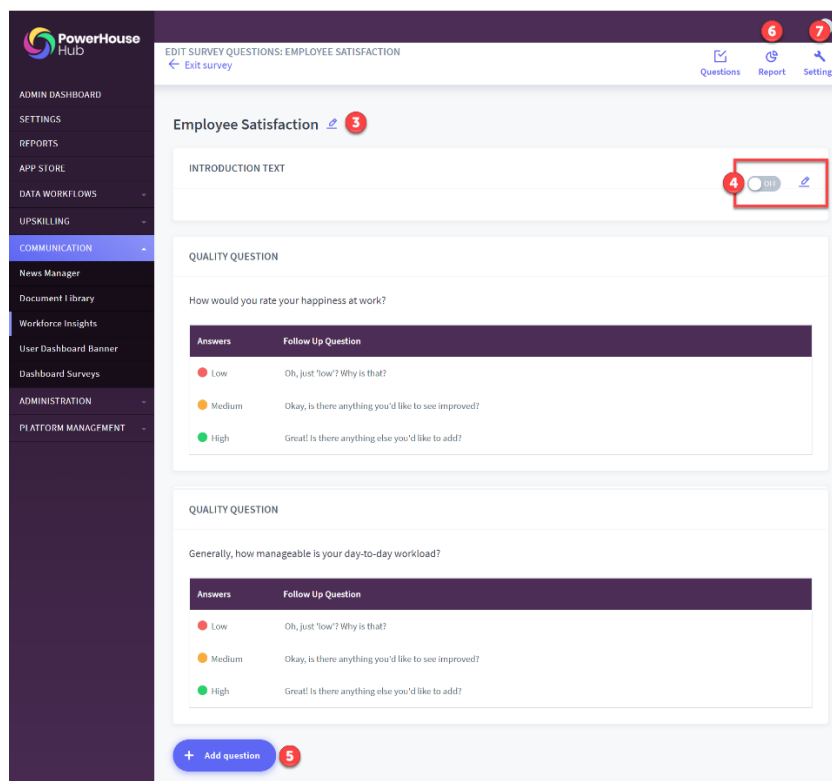


5.3.4 Pre-made Surveys

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



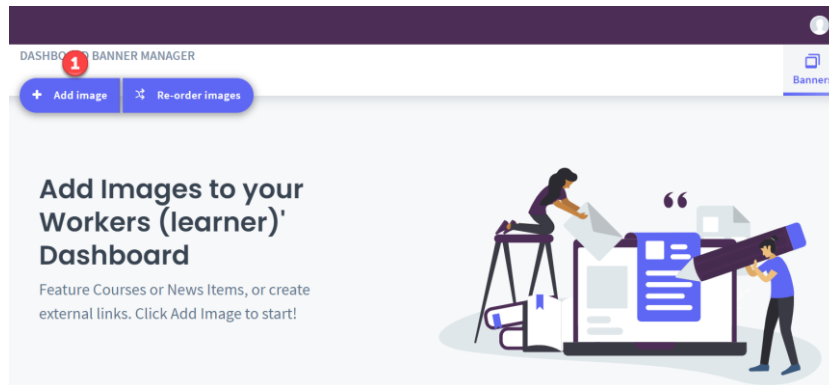
3. Click to edit survey title and click save
4. Toggle On and click to edit intro to add introduction text
5. Click to add another question
6. Click to view survey reports
7. Click to edit survey settings



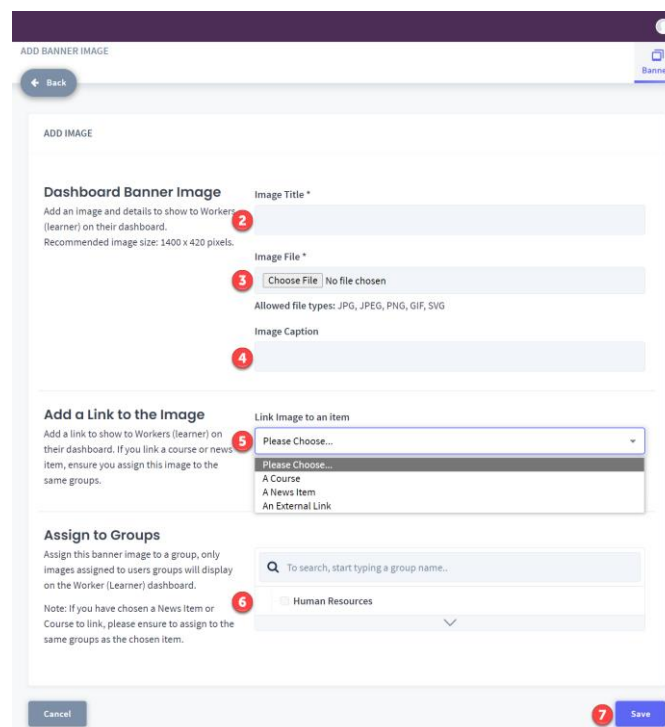
5.4 User Dashboard Banner

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

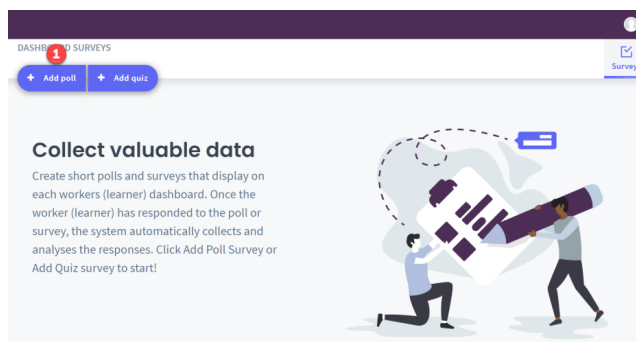
The screenshot shows the 'ADD BANNER IMAGE' form. It has a 'Back' button at the top left and a 'Banners' button at the top right. The form is divided into several sections: 1. 'Dashboard Banner Image' section with a text area for 'Image Title *' (step 2), a 'Choose File' button and 'No file chosen' text for 'Image File *' (step 3), and a text area for 'Image Caption' (step 4). 2. 'Add a Link to the Image' section with a dropdown menu for 'Link Image to an item' (step 5) showing options: 'Please Choose...', 'A Course', 'A News Item', and 'An External Link'. 3. 'Assign to Groups' section with a search bar 'To search, start typing a group name..' (step 6) and a dropdown menu showing 'Human Resources'. At the bottom, there are 'Cancel' and 'Save' buttons (step 7).

5.5 Dashboard Surveys

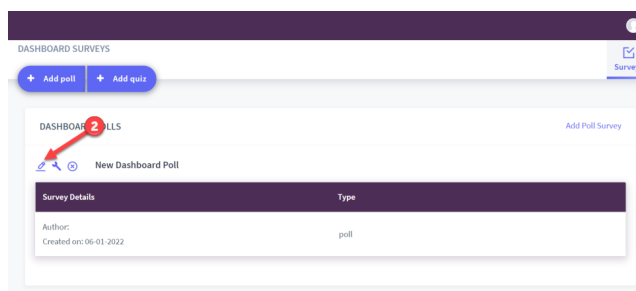
Dashboard Surveys can collect valuable data for your organisational needs. Create short polls and surveys that display on each worker (learner) dashboard. Once the worker (Learner) has responded to the poll or survey, the system automatically collects and analyses the responses.

5.5.1 Add a Poll (True & False Question)

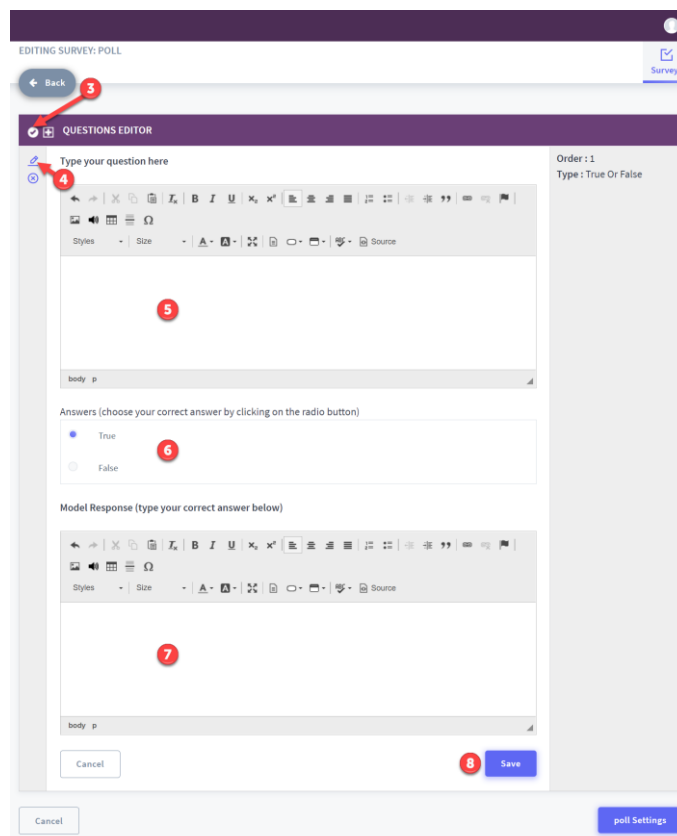
1. Click Add poll



2. Click edit to add questions

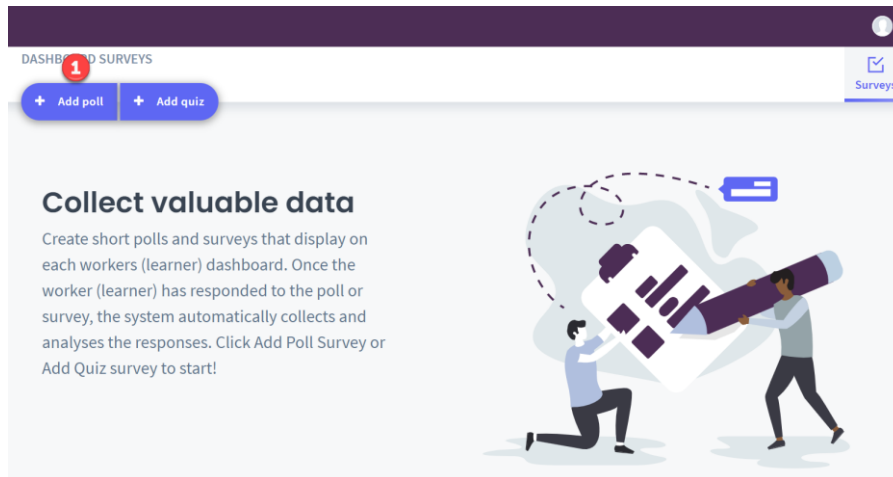


3. Click to add true and false question
4. Click the edit question icon
5. Click in box to type your question
6. Choose the correct answer by clicking on the radio button
7. Click in box to type the correct answer
8. Go back to step 2 to add additional questions. When finished click Save to save changes

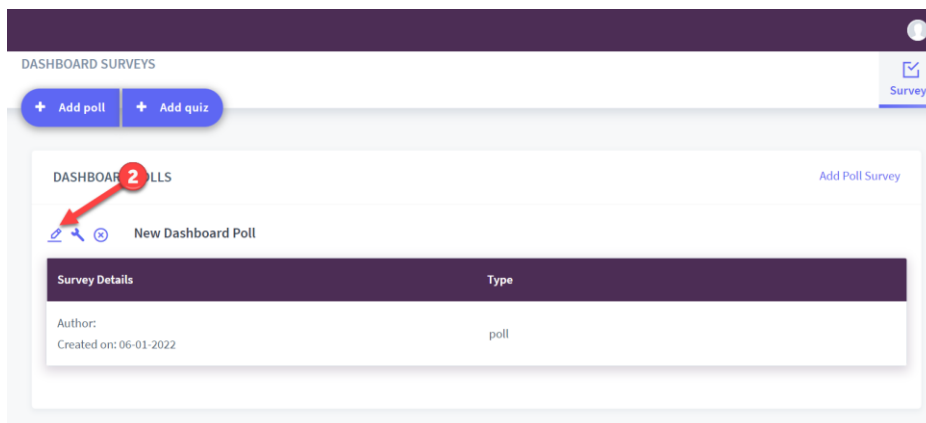


5.5.2 Add a Poll (Multiple Choice Question)

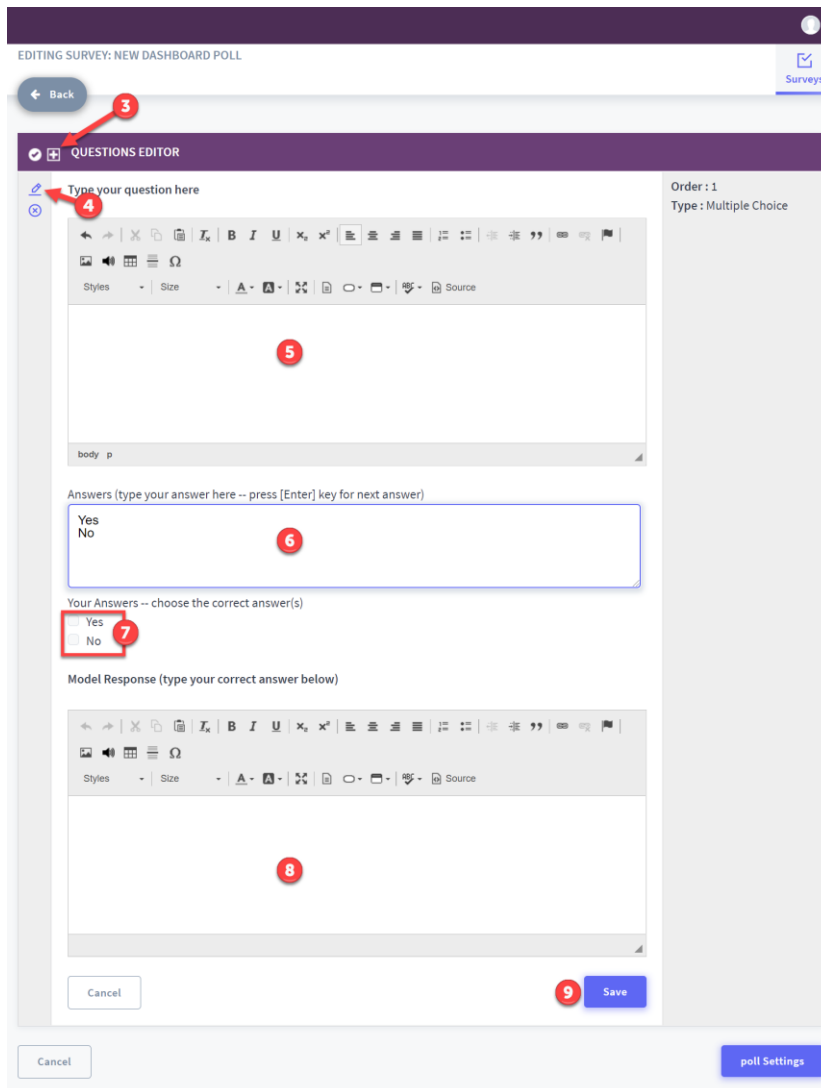
1. Click Add poll



2. Click edit to add questions

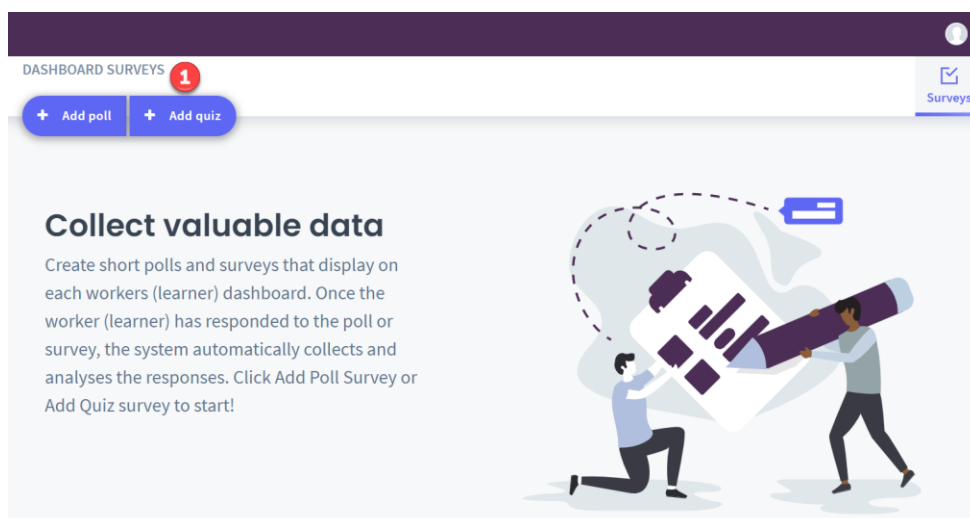


3. Click to add multiple choice question
4. Click the edit question icon
5. Click in box to type your question
6. Click in box to type your multiple-choice questions. Press [enter] key to type next multiple-choice answer. You can add as many answers as you need
7. Select the tick box next to the correct 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

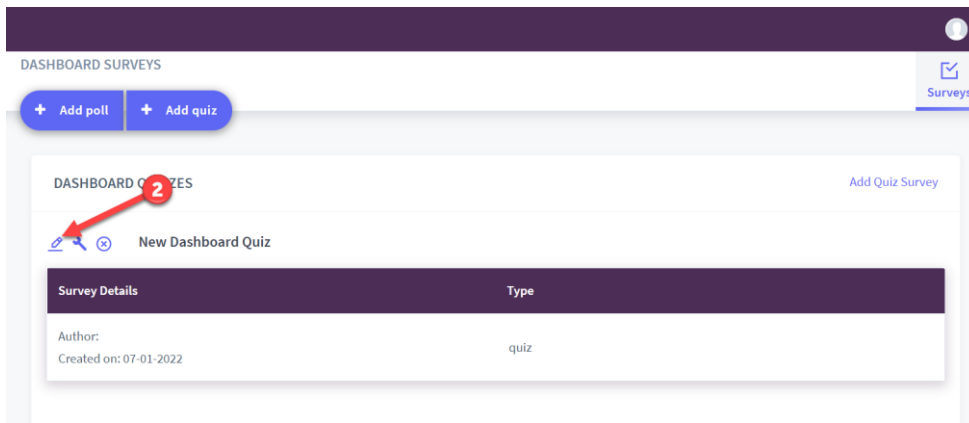


5.5.3 Add a quiz (True & False Question)

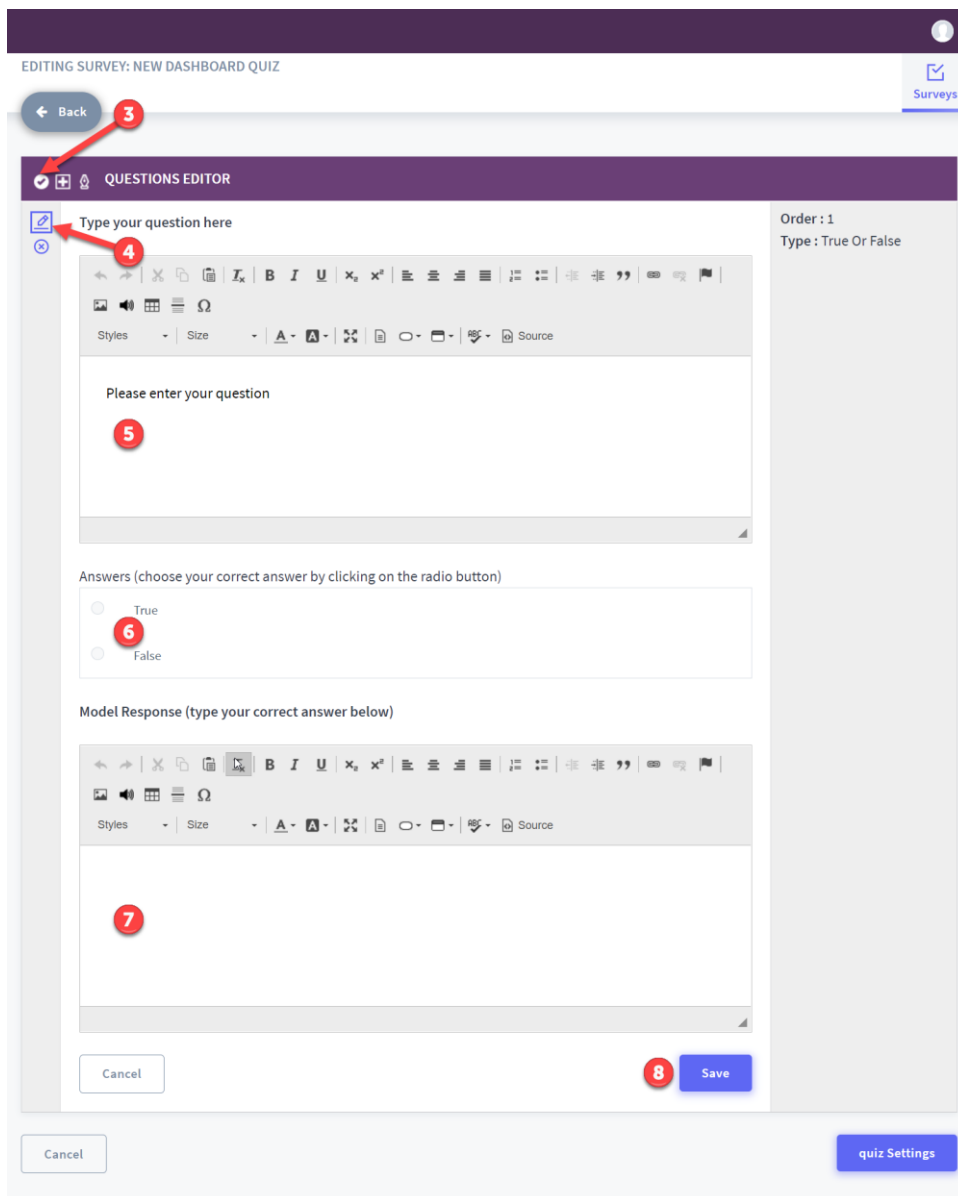
1. Click add quiz



2. Click edit to add question

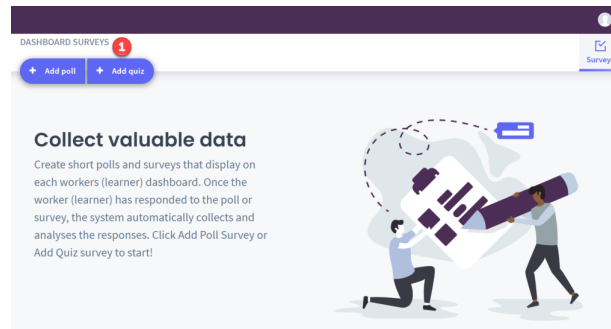


3. Click to add true & false question
4. Click edit question
5. Click in box to type your question
6. Click on the radio box to choose your correct answer
7. Click in box to type the correct answer
8. Go back to step 3 to add additional questions. When finished click Save to save changes

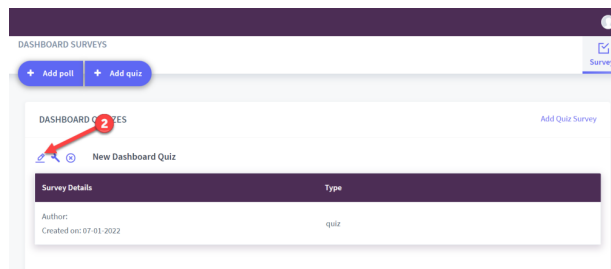


5.5.4 Add a Quiz (Add Multiple Choice Question)

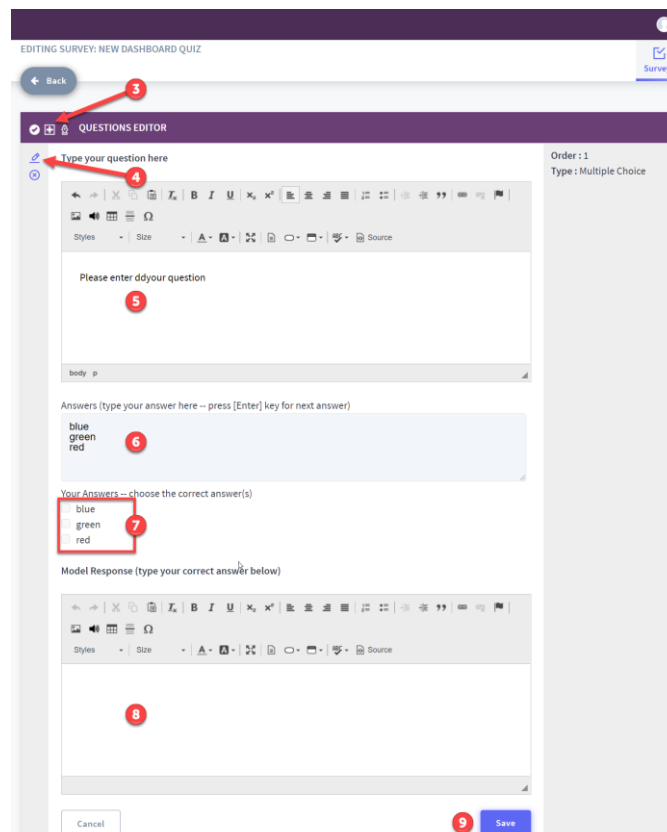
1. Click add quiz



2. Click edit to add question

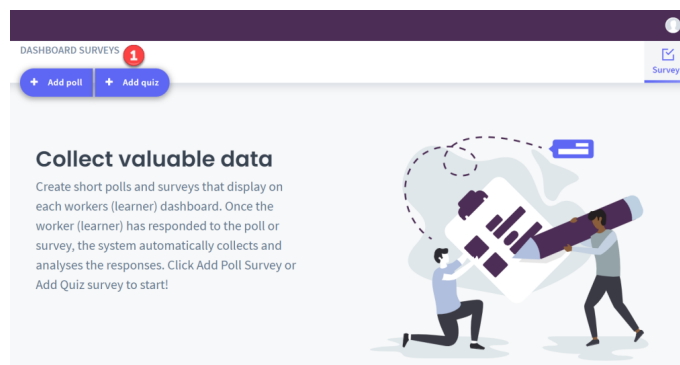


3. Click to add multiple choice question
4. Click edit question
5. Click in box to type your question
6. Click in box to type your answer. Press [enter] key to type next multiple choice answer
7. Select the correct answer
8. Click in box to type the correct answer
9. Go back to step 3 to add additional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

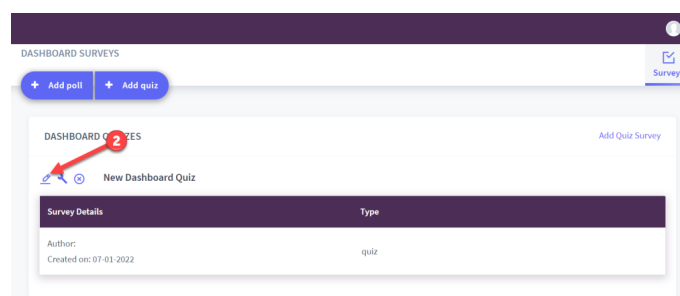


5.5.5 Add a Quiz (Short Answer Question)

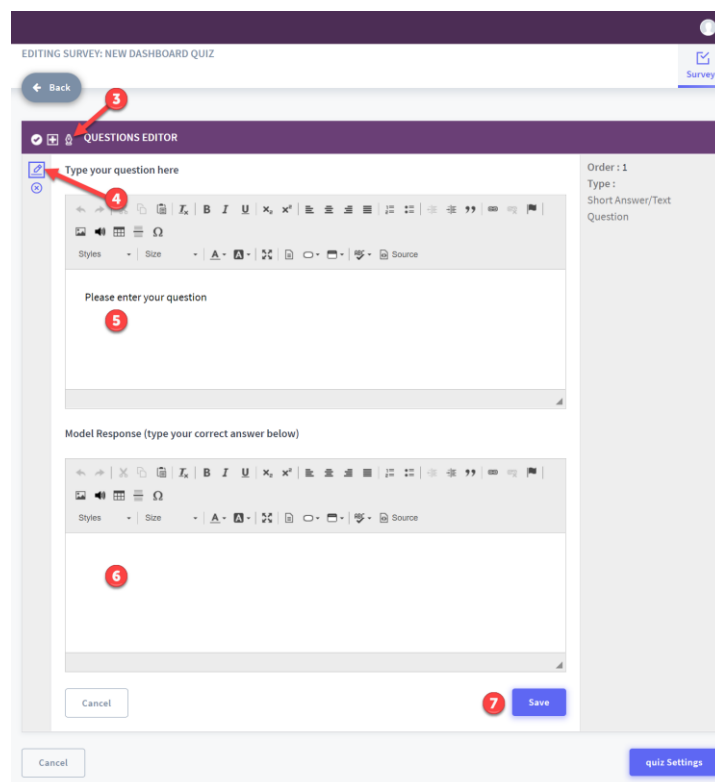
1. Click add quiz



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

DASHBOARD SURVEYS

+ Add poll + Add quiz

DASHBOARD POLLS [Add Poll Survey](#)

Poll

POLL SETTINGS

To edit this Poll, please update the details below.

Poll Title*
Poll

Question Order
Present all questions in order as created

Change Status
Published

Assign to Groups

To search, start typing a group name..

- Human Resources
- People Skills
- Recruit Job Posts

Cancel Save

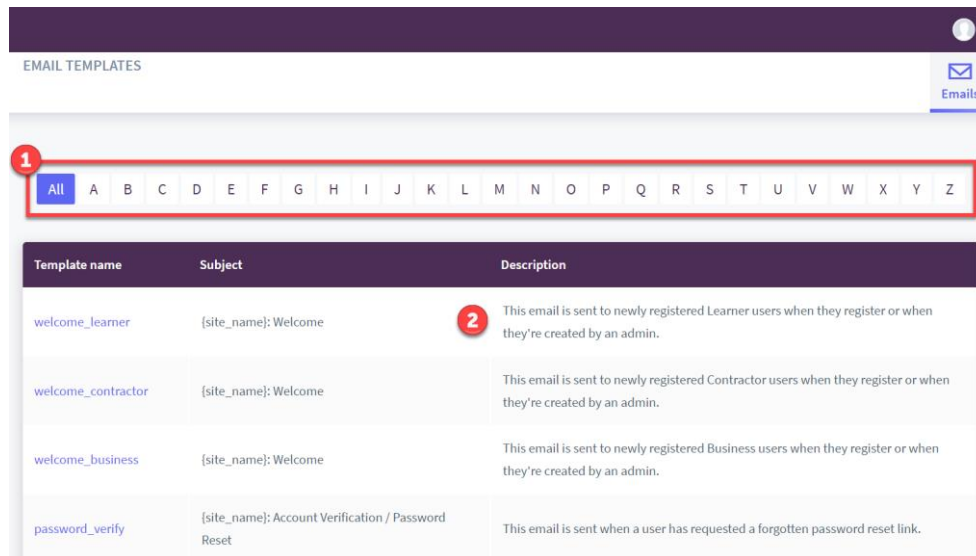
Survey Details	Type
Author: Created on: 06-01-2022	poll

6. Administration

6.1 Email Templates

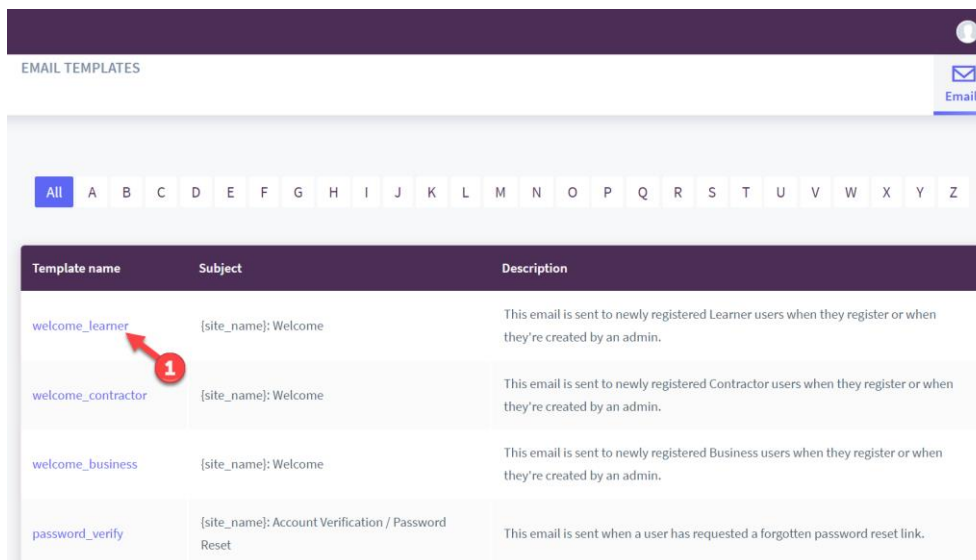
Email templates are pre-created emails that the platform automatically sends once an action has been triggered. For example, send a welcome email to a new user. All templates can be edited if you need to change the wording.

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

Title	Added	Modified
Course Completion	08/12/2021	08/12/2021

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

ADD CERTIFICATE

Back Certificates

ADD CERTIFICATES

Certificate settings
Add a certificate by completing the title, background image and content.

Title *

Background Image * No file chosen

The background image must be a valid image file (.jpg, .png) and should be the same width and height as defined below.

Content*

```
Center|32|#ce2d11|B|B0|Certificate of Completion
Center|Arial|16|#a1a1a1|N|110|This is to certify that
Center|Arial|30|#000000|B|116|{learner_name}
Center|Arial|16|#a1a1a1|N|130|of
Center|Arial|20|#000000|B|138|Company Name
Center|Arial|16|#a1a1a1|N|170|has successfully completed the
Center|Arial|26|#000000|B|178|{course_title}
Center|Arial|16|#a1a1a1|N|190|on
Center|Arial|20|#000000|B|198|{completed_date}
```

Dimensions
All values are in millimetres (mm).

Width* Height*
(default: 210mm) (default: 297mm)

Left Margin* Top Margin* Right Margin*
Default: 20mm Default: 5mm Default: 20mm

Configuration Instructions:
Line Structure: ALIGNMENT|FONT|SIZE|COLOR|STYLE|POSITION|TEXT
Possible Fonts: Arial, Courier, Helvetica, Symbol, Times

Variables:
The range of variables available are determined by where the certificate is assigned.

CPD CERTIFICATES (SIZE: 210W X 297H):
{learner_name}
{completed_date}
{cpd_profile}
{cpd_minimum}

COURSE CERTIFICATES (SIZE: 210W X 297H):
{learner_name}
{course_title}
{completed_date}
{profiles}
{expiry_date}
{cpd_hours}

TRAINING PLAN CERTIFICATES (SIZE: 210W X 297H):
{learner_name}
{program_title}
{completed_date}
{expiry_date}
{profiles}

EVENT CERTIFICATES (SIZE: 210W X 297H):
{learner_name}
{event_title}
{event_venue}
{completed_date}
{profiles}
{cpd_hours}

WEBINAR CERTIFICATES (SIZE: 210W X 297H):
{learner_name}
{webinar_title}
{completed_date}
{profiles}
{cpd_hours}

ONBOARDING CERTIFICATES (SIZE: 210W X 297H):
{learner_name}
{workflow_title}

VISITOR PASS (SIZE: 150W X 90H):
{full_name}
{company_name}
{visiting}
{signin_time}
{visitor_id}

Cancel

6. Click the download button to view your certificate

CERTIFICATE MANAGER

+ Add certificate

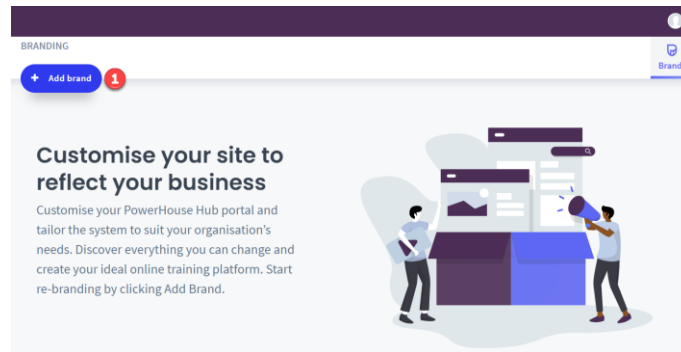
Search Certificates

Title	Added	Modified
<input type="button" value="Download"/> <input type="button" value="Refresh"/> <input type="button" value="Close"/> Course Completion	08/12/2021	08/12/2021

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

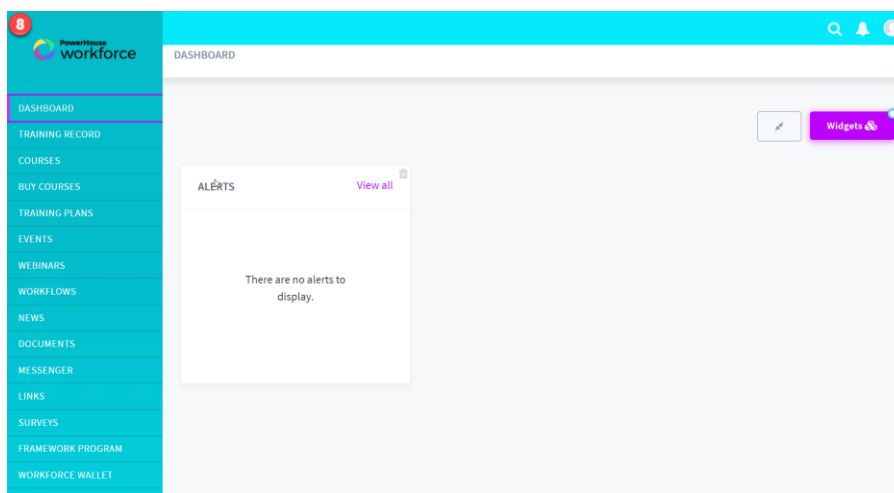
1. Click add brand



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

A screenshot of the 'ADD BRAND' form. The form is divided into several sections: 'Brand details' with fields for 'Brand Name *' (marked with a red '2'), 'Brand Logo *' with a 'Choose File' button (marked with a red '3') and 'Allowed file types: JPG, JPEG, PNG, GIF, SVG', and a 'Status' dropdown menu set to 'Active' (marked with a red '4'). The 'Colours' section includes a 'Use pre-set colour palette' with buttons for 'Slate', 'Purple', 'Orange', 'Green', and 'Red', and two color selection boxes for 'Primary' (marked with a red '5') and 'Accent', each showing current and default hex codes. Below this is a 'Reset colours to default' button. The 'Assign to Groups' section has a search bar and a list of groups: 'Human Resources' (checked), 'People Skills', and 'Recruit Job Posts' (marked with a red '6'). At the bottom, there are 'Cancel' and 'Save' buttons (marked with a red '7').

- 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.

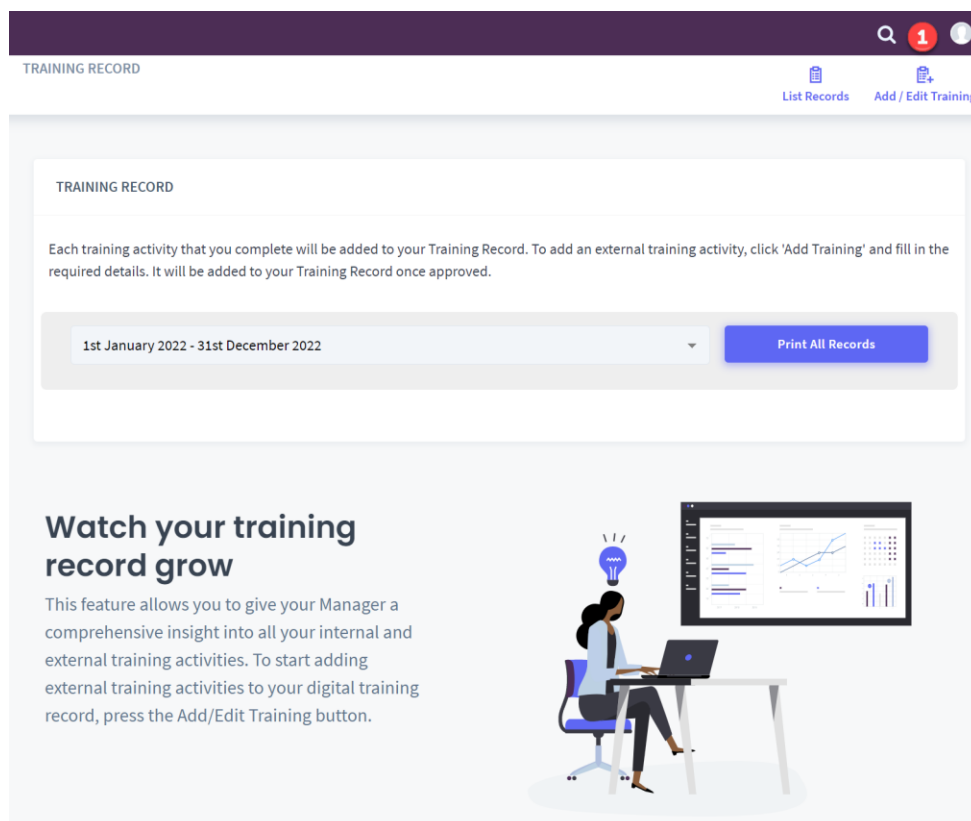
6.5 Training Records

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:

- 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

Name	Email	Date	Activity	CPD Category	CPD Hours	Documentation	Status	Action
Joe Thomas	joe@nowhere.com	01/12/2021	Managing Employee Relations	-	0.00	Manager employee relationship certificate.png	<div style="border: 1px solid #ccc; padding: 5px;"> Edit/View Record Delete Record </div>	

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

EDITING TRAINING RECORD

Training records

← Back

APPROVE TRAINING RECORD

User Details
Users details. Click the file to download a copy.

User Name: Joe Thomas
User Email: joe@nowhere.com
Documentation: [Manager employee relations certificate.png](#)

Training Record Details
Edit the training record by amending these fields if required.

Activity Date: 01/12/2021
Activity Name: Managing Employee Relations
CPD Category: -
CPD Hours: 0.00

Approval
Update the Approval status to Approved for this record to show in the users Training Record list.

Approval Status: Pending
Pending
Approved

Cancel Save

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

ADD TRAINING

List Records Add / Edit Training

Date	Description	Documentation (Maximum file size: 500 MB)	Status	Edit/Delete
01/12/2021	Managing Employee Relations	Manager employee relations certificate.png	Approved	
10/01/2022	Certificate iv in work health and safety	Certificate iv in work health and safety.png	Pending	Edit Delete

Date Activity No file chosen [Add](#)

Cancel

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

Name	Email	Date	Activity	CPD Category	CPD Hours	Documentation	Status	Action
Joe Thomas	joe@nowhere.com	01/12/2021	Managing Employee Relations	-	0.00	Manager employee relations certificate.png	Approved	⋮
Joe Thomas	joe@nowhere.com	10/01/2022	Certificate iv in work health and safety	-	0.00	Certificate iv in work health and safety.png	Approved	⋮

Page: 1 of 1

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

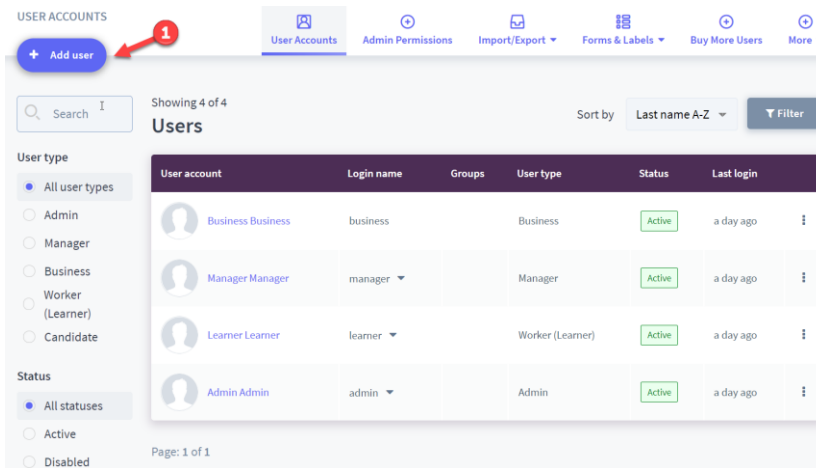
A Candidate user is only created automatically when they apply for a job within the Recruitment Service Module and are in the phase of being screened for suitability by Management. Once successful; this Candidate User is transitioned automatically into a Learner User License.

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 admin 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).

Account details

Select the type of user you want to create...

User Type * Admin

Permission Scheme (Edit) Default

Status * Active

Note: The fields below *may* change depending on the type of user you are creating, and whether or not they're linked to a business so it is advised you select all options above first.

General Information

Provide as much detail as you can about this user.

Role

Title

Mr

First name *

Last name *

Address (Line 1)

Address (Line 2)

Suburb / Town

City

State / County

Post code / Zip code

Country *

Please select

Phone

Mobile

Email address *

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

5 Profile Picture
Add the profile picture for this user.

6 Link Accounts
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 Login Details
Create login details for your new user (note that the username must be more than three (3) characters long).

8 Assign to Groups
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 Create

6.6.2 Assigning user groups

1. Click on a user from the User Accounts page

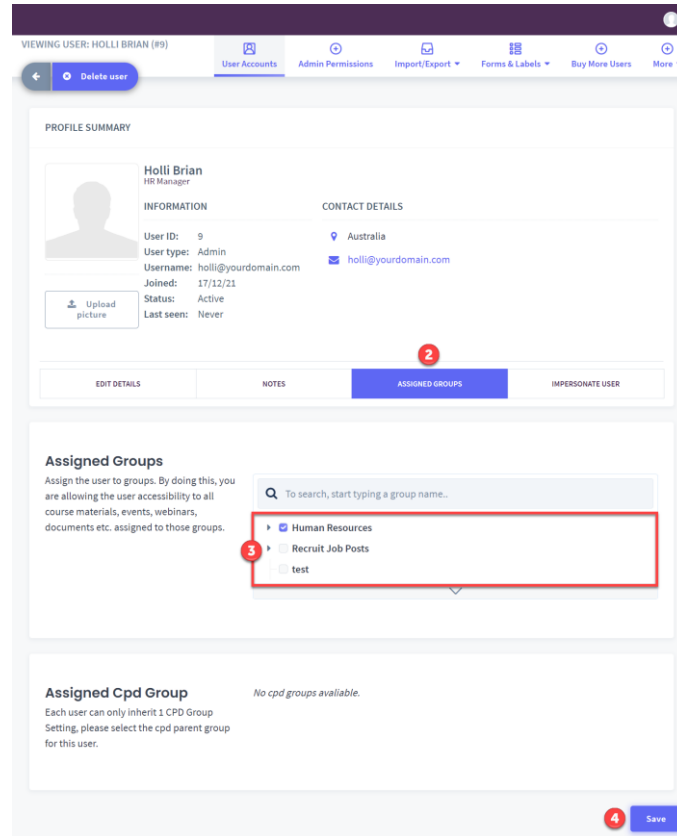
USER ACCOUNTS

Showing 8 of 8

Users

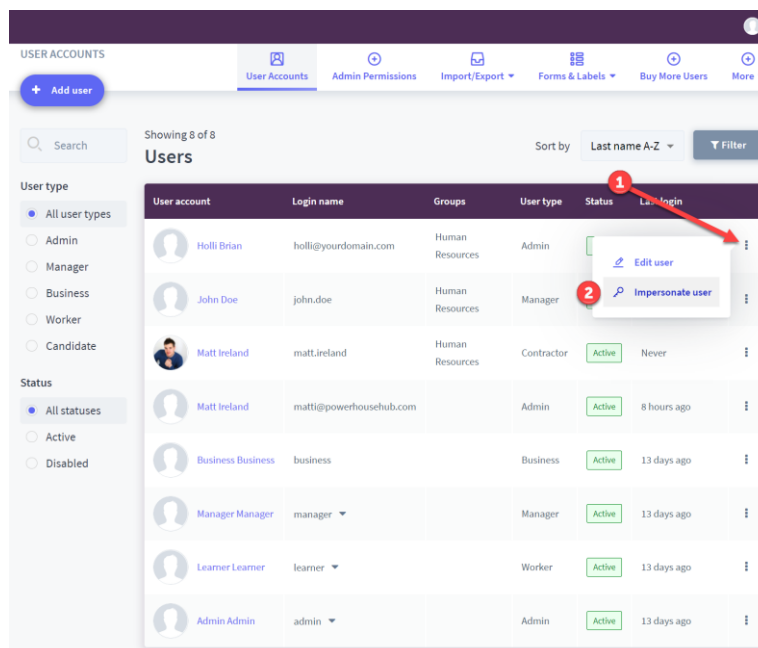
User account	Login name	Groups	User type	Status	Last login
Hollie Brian	hollie@yourdomain.com	Human Resources	Admin	Active	Never
John Doe	john.doe	Human Resources	Manager	Active	Never
Matt Ireland	matt.Ireland	Human Resources	Contractor	Active	Never
Matt Ireland	matti@powerhousehub.com		Admin	Active	7 hours ago
Business Business	business		Business	Active	13 days ago

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



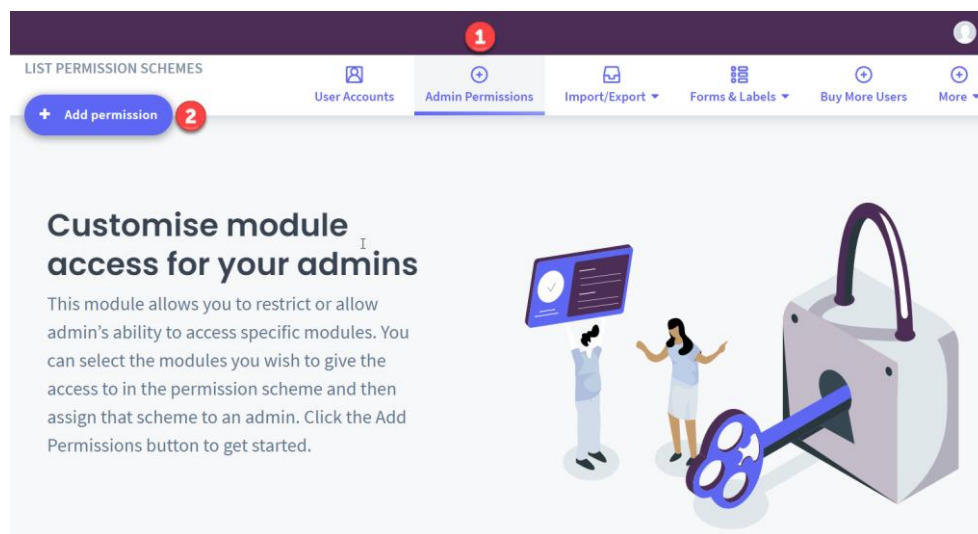
A new window will appear and allow you to navigate the platform and see exactly what that user will see. This can be used to test any settings made to the account or help problem solve if a user is having issues with the platform.

6.6.4 Admin Permissions

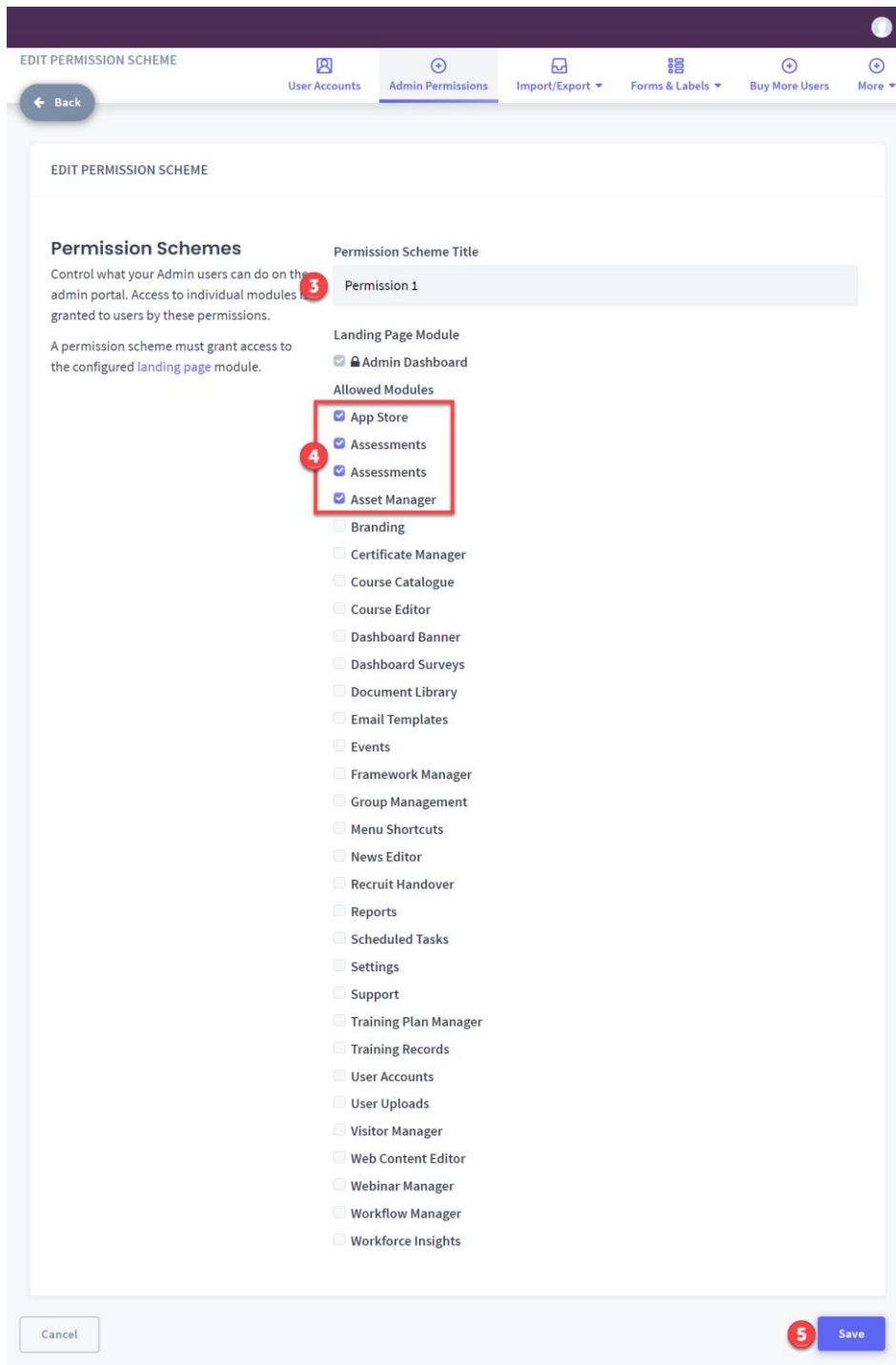
This module allows you to restrict or allow admin's ability to access specific modules in the left hand navigation. You can select the modules you wish to give the access to in the permission scheme and then assign that scheme to an admin.

Click the Add Permissions button to get started

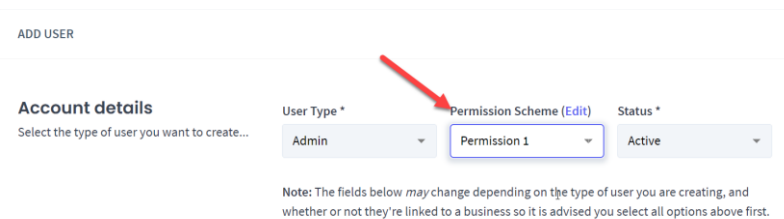
1. Click the Admin Permissions tab
2. Click Add permission



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.

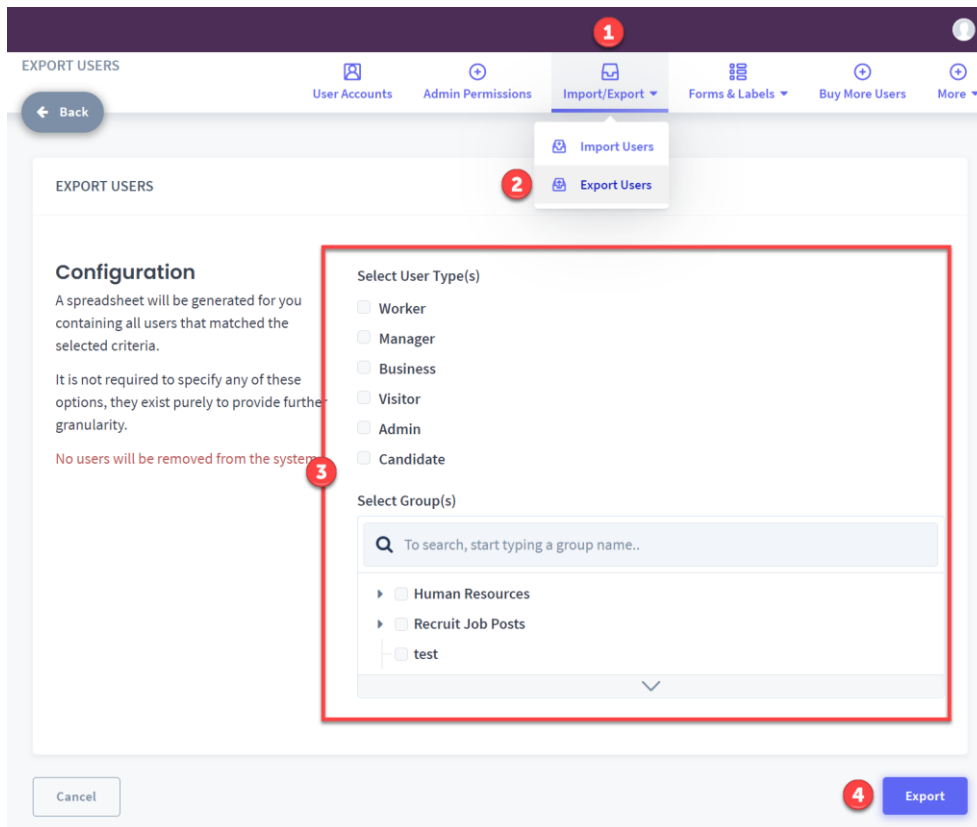
1. Click Import/Export dropdown box in the top menu panel
2. Click Import Users
3. Download CSV Template and fill out the form with all user information
4. Upload completed CSV
5. If you haven't added a password for each user in the CSV, please select an option from the drop down box
6. Click Validate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

The screenshot shows the 'IMPORT USERS' page in a web application. At the top, a dark purple navigation bar contains the title 'IMPORT USERS' and several menu items: 'User Accounts', 'Admin Permissions', 'Import/Export' (highlighted with a red circle '1'), 'Forms & Labels', 'Buy More Users', and 'More'. Below the navigation bar, a 'Back' button is visible. A dropdown menu is open under 'Import/Export', showing 'Import Users' (with a red circle '2') and 'Export Users'. The main content area is titled 'IMPORT USERS' and contains the following text: 'Please select an LMS compatible CSV file to import. You can obtain the required template by clicking the "Download CSV Template" link below. Maximum file size: 500 MB'. Below this is a file selection area with a 'Choose File' button and the text 'No file chosen' (with a red circle '4'). A link 'Download CSV Template' is present (with a red circle '3'). The section 'Group Assignments:' explains that users can be assigned to specific groups, with instructions on how to use group keys in the CSV file. The section 'CPD Group Settings:' states that each user will inherit 1 CPD Group Setting. The section 'Duplicates:' notes that duplicate accounts will be ignored. The section 'Blank Password Handling:' explains that passwords can be specified in the CSV or left blank. Below this is a dropdown menu with 'Please Select' (with a red circle '5'). At the bottom right, there is a 'Validate & Import' button (with a red circle '6') and a 'Cancel' button.

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.

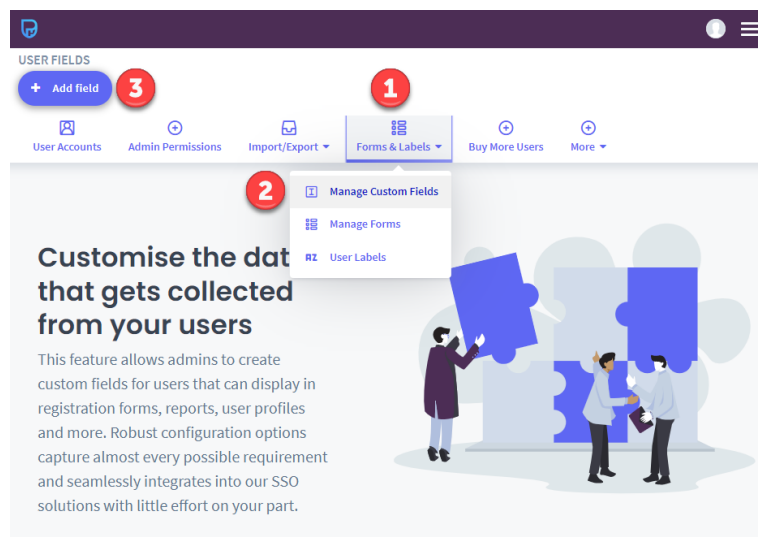
1. Click Import/Export
2. Click Export Users from the dropdown box
3. Select the relevant user type(s) and group(s) that they are associated to
4. Click Export



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

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

The screenshot shows the 'NEW USER FIELD' configuration page. At the top, there is a navigation bar with a 'Back' button and several menu items: 'User Accounts', 'Admin Permissions', 'Import/Export', 'Forms & Labels' (which is selected), 'Buy More Users', and 'More'. Below the navigation bar is the 'GENERAL INFORMATION' section. It contains a 'Field description' heading and a text area for the description. The 'Type' field is a dropdown menu with 'Please Select' selected. The 'Title' field is a text input containing 'My Custom Field'. The 'Description' field is a larger text area, currently empty, with a character count of '0 / 255'. Below the description is the 'Display & Permission settings' section, which includes two toggle switches: 'Show in reports' and 'Show in user profiles', both currently set to 'NO'. At the bottom of the form, there are 'Cancel' and 'Create' buttons.

4 Type *

Please Select

5 Title *

My Custom Field

6 Description

If provided, the content below will be displayed below the field, typically useful for providing helpful information about the field.

0 / 255

7 Show in reports NO

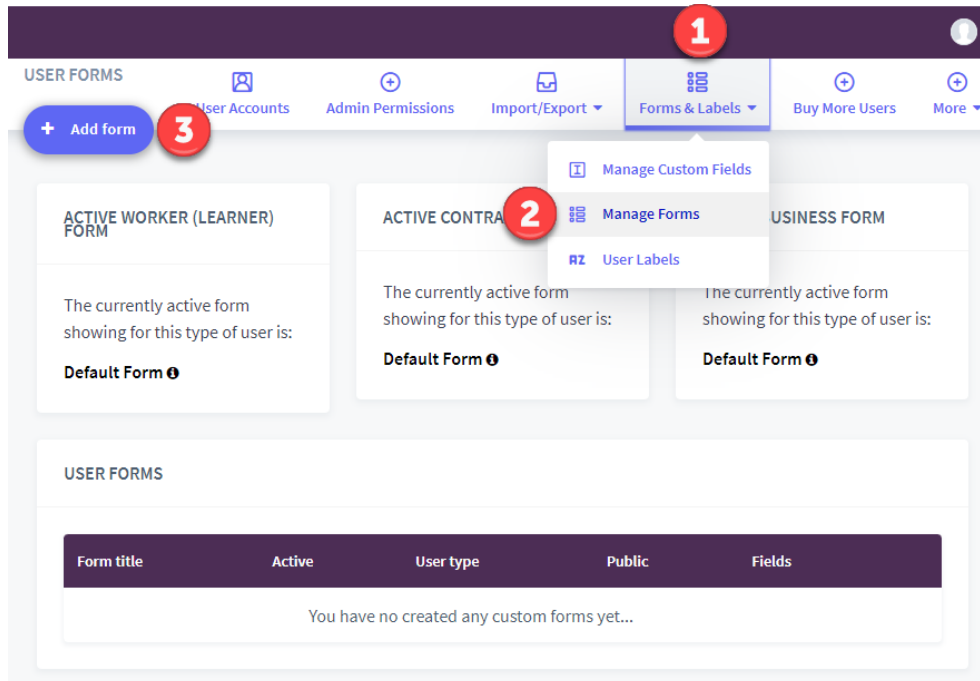
Show in user profiles NO **8**

9 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

CREATE NEW FORM

User Accounts Admin Permissions Import/Export Forms & Labels Buy More Users More

+ Create custom field

GENERAL INFORMATION

The LMS consists of 3 registration forms, one for Workers (learner), one for Businesses (business) and one for Contractors (contractor) (Workers (learner) who belong to a Business). The latter may not always be applicable to every site owner but usually the Workers (learner) form is.

You can create your own forms from scratch but they must include 4 crucial fields required for creating an account which is the username, email address, first and last name. You can reorder fields and even hide them. Once you have created your form you can activate it whenever you like.

Form description

Please provide the type of field you want to create, along with a title and an optional introduction that can be displayed atop the form.

4 Page Heading
Registration Form

5 Form Title (Internal only) * Form Type *
Please Select 6

7 Publicity *
Anyone can register an account (default)

8 Introduction

9

Group Assignments

You can automatically assign registrants to specific groups. Note that businesses will automatically be assigned to a system generated business group and contractors will automatically be assigned to those groups however you can select additional groups to assign these users as well.

Auto-assign the following groups:

To search, start typing a group name..

- Human Resources
- Information Technology
- People Skills
- Recruit Job Posts

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

The screenshot displays a 'FORM BUILDER' interface with the following components:

- 10**: '+ Add Standard Field' button
- 11**: '+ Add Custom Field' button
- 12**: Edit and delete icons for the 'Title' field
- 13**: Edit and delete icons for the 'Role' field
- 14**: Edit and delete icons for the 'First name' field
- 15**: 'Create' button

The form fields include:

- Title (Dropdown menu with 'Mr' selected)
- Role (Text input)
- First name * (Text input)
- Last name * (Text input)
- Email address * (Text input)
- Username * (Text input)
- Password * (Text input)
- Confirm Password * (Text input)
- Terms & Conditions * (Checkbox with text: 'I have read and agree to the [terms and conditions](#).')

Additional form details:

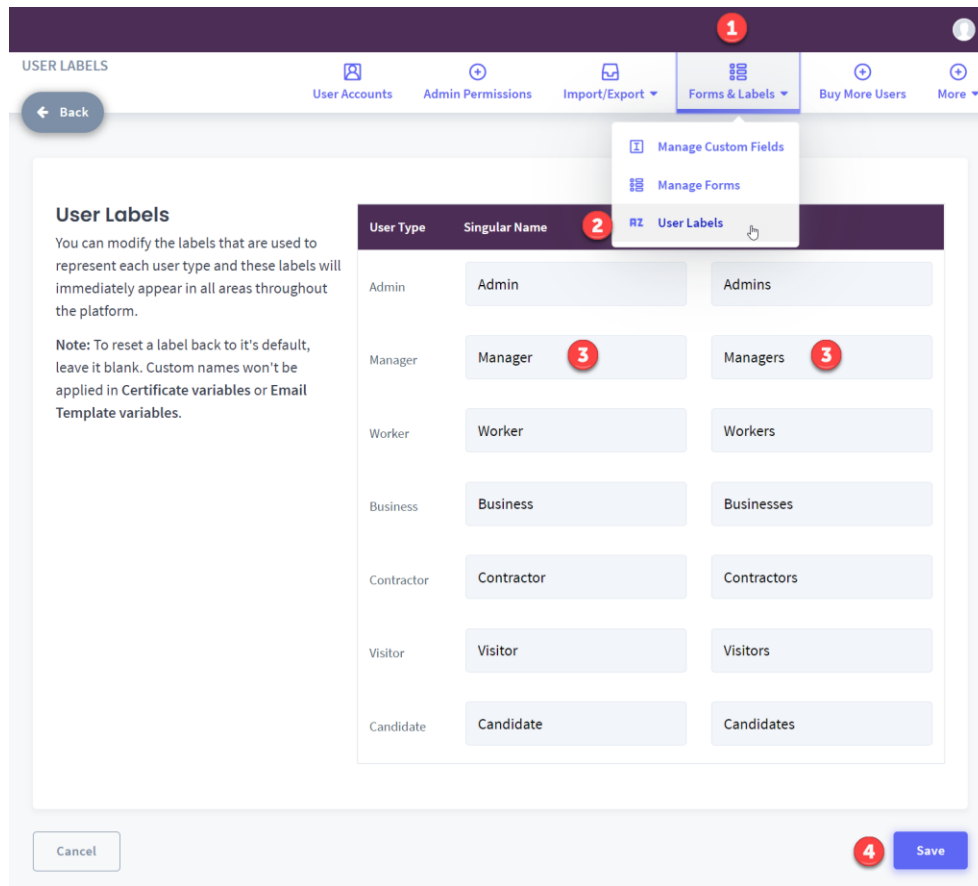
- Validation rules for Password:
 - Must contain 6-12 characters
 - Passwords must match
- Buttons: 'Cancel' and 'Create'

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.

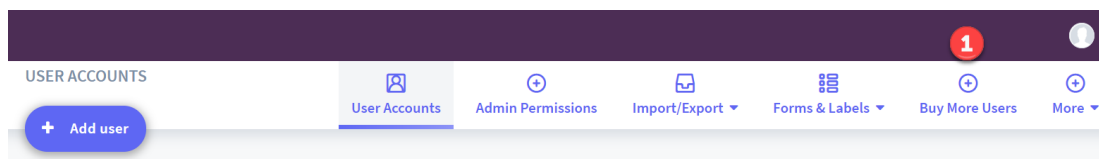
Note: To reset a label back to it's default, leave it blank. Custom names won't be applied in Certificate variables or Email Template variables.

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

LICENSING REQUEST

E-commerce Display Platform Developers About

Back

CONTACT POWERHOUSE HUB

Purchase Additional Accounts

Please complete the form below and one of our friendly team members will be in contact with you shortly.

2

First Name * Last Name *

Email * Phone * +61 412 345 678

Number of Accounts *

License Requirements *

Cancel Submit 3

6.6.11 More

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

USER ACCOUNTS

+ Add user

User Accounts Admin Permissions Import/Export Forms & Labels Buy More Users More

Showing 8 of 8 Users

Sort by Last

1 Username settings

2 Registration settings

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

GROUP MANAGEMENT

+ Add group

Build unlimited hierarchical groups

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. Click the Add Group button to begin!

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

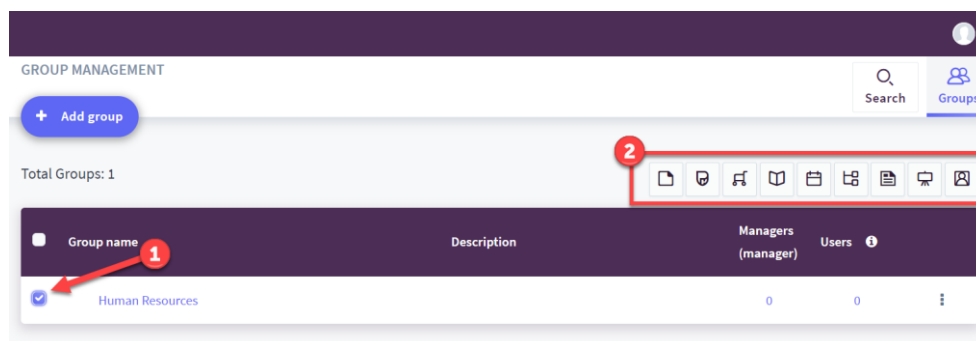
1. Click the hamburger icon
2. Click add subgroup

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

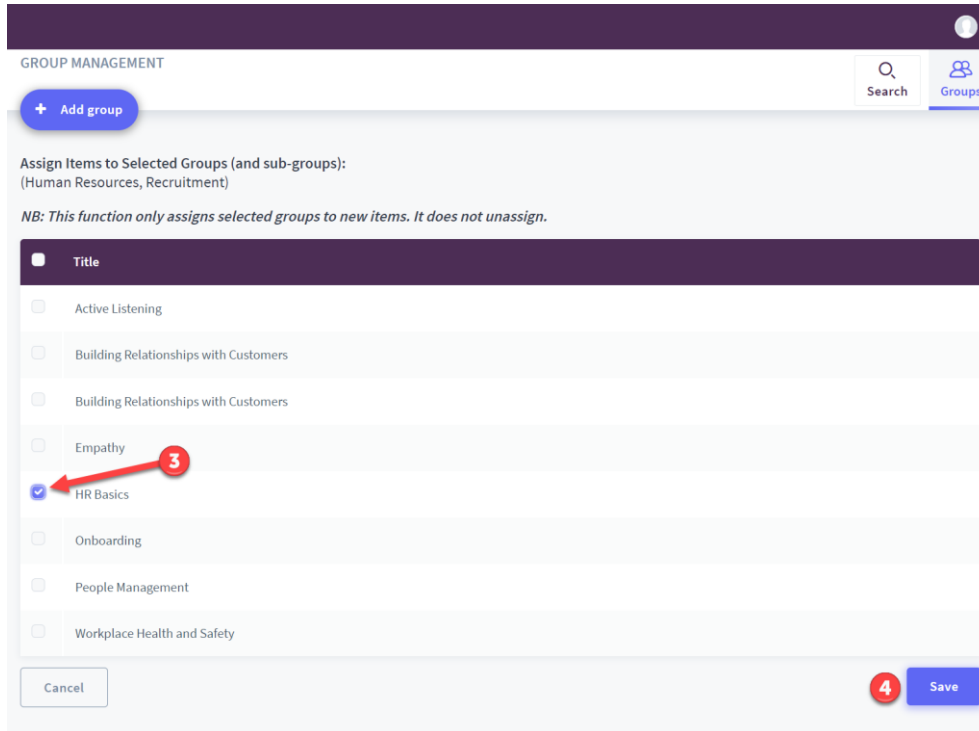
6.7.3 Assigning assets to groups

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



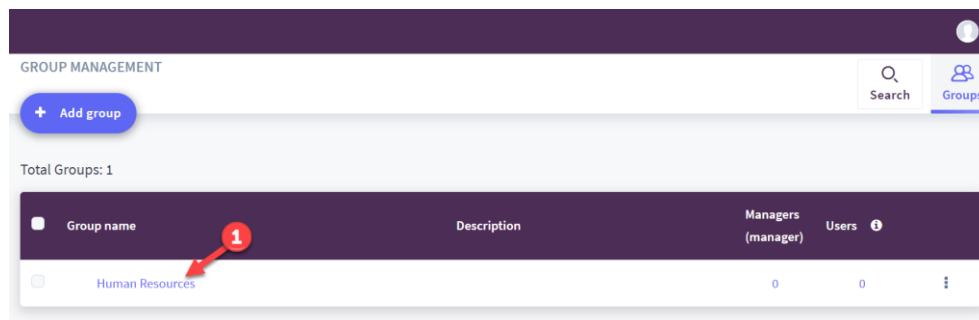
For the below example the Courses asset was selected

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

ASSET MANAGER

Search Assets

Smart organisation of your files

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 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

SCHEDULED TASKS

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.

Schedule	Title	Last run	Next run	1	2
Every day at 5:00am *	Course Delay	13/01/2022 05:09AM	13 hours from now	Disable	View Log
Every day at 5:00am *	Course Expiries	13/01/2022 05:09AM	13 hours from now	Disable	View Log
Every day at 5:00am *	Course ReInductions	13/01/2022 05:09AM	13 hours from now	Disable	View Log
Every day at 12:00am *	CPD Renewal	13/01/2022 12:09AM	8 hours from now	Disable	View Log
Every day at 5:00am *	License Expiry	13/01/2022 05:09AM	13 hours from now	Disable	View Log
Once every 1 hours *	News Emailer	13/01/2022 03:03PM	1 minute from now	Disable	View Log
Every day at 5:00am *	Program ReInductions	13/01/2022 05:09AM	13 hours from now	Disable	View Log
Every minute *	Queued Jobs	13/01/2022 03:58PM	10 seconds from now	Disable	View Log
Every 15 minutes *	Recruit Sync	13/01/2022 03:49PM	1 minute from now	Disable	View Log
Every day at 5:00am *	Workflow Reminders	13/01/2022 05:09AM	13 hours from now	Disable	View Log

* 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.

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

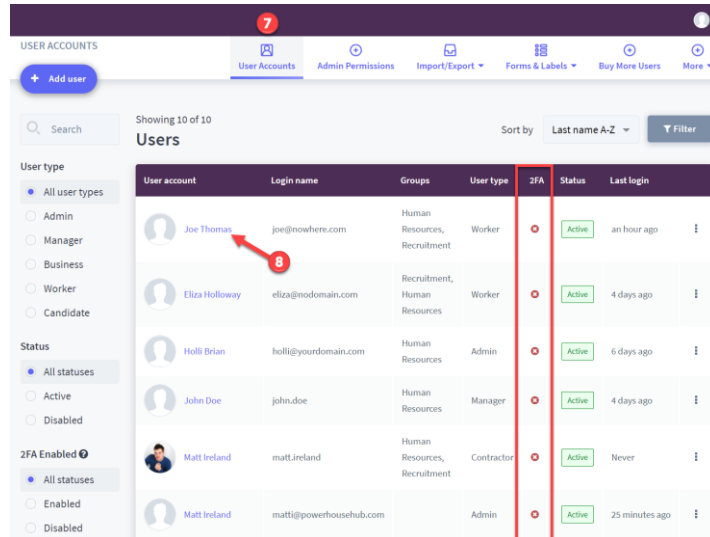
This integration adds a secondary layer of security to login forms.

- 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

The screenshot shows the Twilio Authy integration settings page. It features a toggle for 'Enable Integration' (currently OFF), an 'APP SETTINGS' section with an 'API Key' input field, an 'OTP Length' dropdown menu (set to 'Please Select'), and an 'Introduce your users to 2FA by:' dropdown menu (set to 'Do nothing'). There is also a section for 'Enable Generic Authenticator Tokens' with a 'NO' toggle. A 'Save' button is located at the bottom right. Red numbered callouts (1-6) are overlaid on the interface to indicate the steps: 1. 'Enable Integration' toggle, 2. 'API Key' input field, 3. 'OTP Length' dropdown, 4. 'Introduce your users to 2FA by:' dropdown, 5. 'Enable Generic Authenticator Tokens' toggle, and 6. 'Save' button.

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

