PowerHouse Upskill User Guide

V.7.3 – 009a

1. The Administration Portal 7
1.1 Categories 7
1.1.1 Dashboard 7
1.1.2 Settings 7
1.1.3 Reports 8
1.1.4 App Store 8
1.1.5 Recruitment 8
1.1.6 Data Workflow 8
1.1.7 Upskilling 8
1.1.8 Communication 8
1.1.9 Administration 8
1.1.10 Platform Management 8
2. Settings 9
2.1 E-commerce 9
2.1.1 Payment Gateways 9
2.1.2 Payment Settings 10
2.1.3 Alternative Login Page 11
2.1.4 Frontend Course Catalogue 11
2.2 Display 11
2.2.1 Site Details 11
2.2.2 Branding & Styling 12
2.2.3 Menu Manager 13
2.2.4 Custom Scripts 13
2.3 Platform 14
2.3.1 Modules 14
2.3.2 System Settings - Global 14
2.3.3 System Settings - Registration Forms 16
2.3.4 System Settings – Security 18
2.3.5 Email Settings 19
2.3.6 Licensing 20
2.3.7 CPD 20
2.3.8 Messenger 21
2.3.9 About 21
3. Reports 22

3.1 Accessing and Configuring Reports 23
3.2 Generating a Report 23
4. App Store 24
5. Data Workflows 25
5.1 Workflow Manager 25
5.1.1 Adding Workflow Items 26
5.1.2 Personal Information 26
5.1.3 Content Page 27
5.1.4 File Uploads 27
5.1.5 Induction Courses 28
5.1.6 Self-Assessed Skills 28
5.1.6 Workflow Settings 29
5.1.7 Assigning Workflows 29
6 Upskilling 30
6.1 Webinar Manager 30
6.1.1 Creating Categories 30
6.1.2 Add Webinar 31
6.1.3 Webinar Action Buttons 32
6.1.4 Webinar Description 32
6.1.5 Assign Webinar to Groups 33
6.1.6 CPD Category 33
6.2 Event Manager 34
6.2.1 Presenters 34
6.2.2 Venues 34
6.2.3 Categories 35
6.2.4 Adding an Event 36
6.2.5 Event Session 37
6.2.6 Event Action Buttons 37
6.2.7 Event Description 38
6.2.8 Assign the Event to Groups 39
6.2.9 CPD Category 39
6.2.10 Custom Fields 40
6.2.11 Waiting List 41
6.2.12 Event Payments 41

6.2.13 Event Settings 42
6.3 Course Catalogue 42
6.3.1 Adding a Course Category 42
6.3.2 Add Course Catalogue Item 43
6.3.3 Assign Courses 43
6.3.4 Course Catalogue Action Buttons 44
6.3.5 Catalogue Description 44
6.3.6 Adding Videos and Images 44
6.3.7 Recommend (Assign Course to a Group) 45
6.3.8 Adding a Discount Coupon 46
6.3.9 View Payment Data 46
6.3.10 More – E-commerce Settings 46
6.4 Content Publisher 47
6.4.1 Categories 47
6.4.2 Adding a Course 47
6.4.3 Building the Course Skeleton 49
6.4.4 Course Actions Items 49
6.4.5 Creating Course Pages Using the CK Editor 50
6.4.6 Creating Course Pages from a Template 50
6.4.7 Uploading Images and Audio Files 51
6.4.8 Adding a Video 52
6.4.9 Adding Rated Response Question 52
6.4.10 Adding a Test or Practice Test 53
6.4.11 Course Settings 54
6.4.12 Export Course 55
6.4.13 Add SCORM Course 55
6.4.14 Import Course 56
6.4.15 Marking 56
6.4.16 More – Global Settings 57
6.5 Training Plan Manager 57
6.5.1 Adding a Training Plan 57
6.5.2 Tagging a Skill to a Training Plan 58
6.5.3 Assign Courses 59
6.5.4 Assign Training Plan to Groups 59

6.6 Framework Manager 60
6.6.1 Adding a Category 60
6.6.2 Adding a Framework 60
6.7 File Uploads 66
6.7.1 File Types 66
6.7.2 Categories 67
6.7.3 Adding a File 67
6.7.4 Adding a Skills Evidence File Upload 68
6.8 Skills 69
6.8.1 Adding a Category 69
6.8.2 Adding a Skill 70
6.8.3 Importing a Skill 71
7 Communication 72
7.1 Links Manager 72
7.2 News Manager 73
7.2.1 Adding a News Category 73
7.2.2 Add News 73
7.3 Document Library 74
7.3.1 Adding a Category 74
7.3.2 Adding a Document 75
7.3.3 Document Library Actions 75
7.4 Workforce Insights 76
7.4.1 Survey Settings 76
7.4.2 Survey Report 77
7.5 User Dashboard Banner 77
7.6 Dashboard Surveys 78
7.6.1 Add a Poll (True Or False Question) 78
7.6.2 Add a Poll (Multiple Choice Question) 79
7.6.3 Add a Quiz (True or False Question) 80
7.6.4 Add a Quiz (Add Multiple Choice Question) 81
7.6.5 Add a Quiz (Short Answer Question) 82
7.6.6 Poll and Quiz Settings 83
8 Administration 84
8.1 Email Templates 84

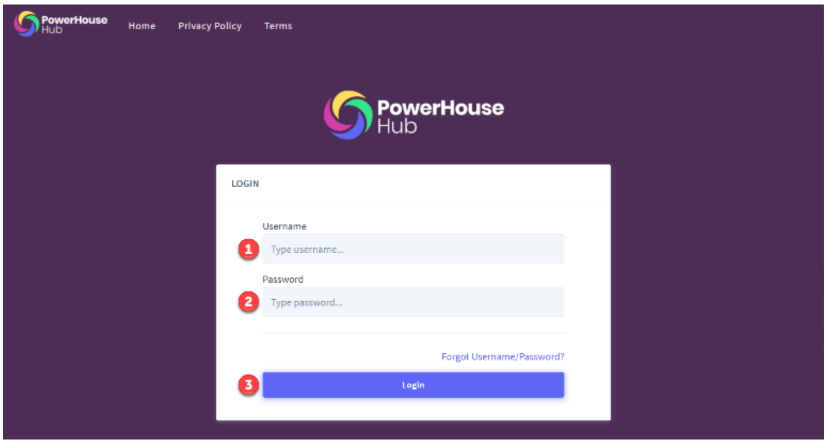
8.1.1 Editing an Email Template ... 84
8.2 Certificate Manager ... 85
8.3 Group Branding ... 86
8.4 Visitor Manager ... 87
8.5 Training Records ... 87
8.5.1 Adding an External Training Course for Review ... 87
8.5.2 Accepting Training Records ... 88
8.5.3 Delete a Training Record ... 88
8.6 User Accounts ... 88
8.6.1 Add a User Account ... 89
8.6.2 Assigning User Groups ... 91
8.6.3 Impersonate User ... 91
8.6.4 Admin Permissions ... 91
8.6.5 Import Users ... 93
8.6.6 Export Users ... 93
8.6.7 Manage Custom Fields ... 94
8.6.8 Manage Forms ... 95
8.6.9 User Labels ... 97
8.6.10 Buy More Users ... 97
8.6.11 More ... 97
8.7 Group Management ... 98
8.7.1 Adding a Group ... 98
8.7.2 Adding a Subgroup ... 99
8.7.3 Assigning Assets to Groups ... 100
8.7.4 Edit Group ... 100
8.8 Asset Manager ... 101
8.9 Scheduled Tasks ... 101
9 Platform Manager ... 102
10.1 Web Content Editor ... 102
10.1.1 List Pages ... 102
10.1.2 Communities ... 104
10.1.3 Submit Sitemap ... 107
10.1.4 Slideshow Manager ... 107

1. The Site Administration Portal

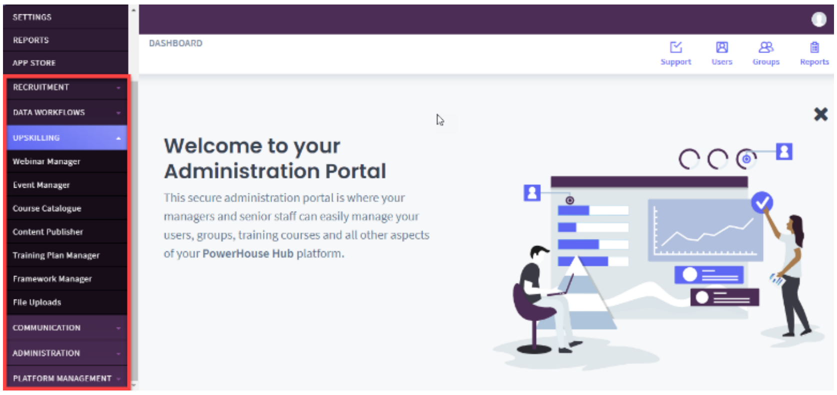
The Site Administration Portal manages the settings, modules, groups, users and permissions. You are provided with a Site Administrator account to manage this portal and your administrator may set up additional administrators with specific permissions. The log-in page is central for all users, yet once 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

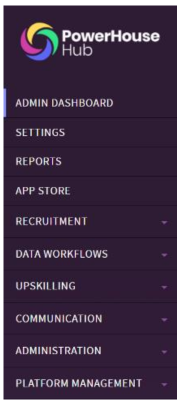


To access the modules within the platform, click the category items on the left-hand side menu. As you select the category, the related modules are displayed.



1.1 Categories

Categories are displayed in the left-hand menu:



1.1.1 Dashboard

This is the default screen that you see once logged in to the portal. The dashboard is where your administrators can manage users, groups, training courses and all other aspects of your PowerHouse Platform.

1.1.2 Settings

This category is related to the site settings of your portal. Settings include user permissions, security, display and design elements, email and site settings.

1.1.3 Reports
Reports play an important role in the management of this platform. Each feature has an auto-generated report available. If you want a customised report, you can easily generate this by clicking the 'Create custom report' button.

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

1.1.5 Recruitment
This category provides access to the recruitment modules to allow your recruiters and hiring managers to easily create Talent Communities, access the Talent Marketplace and publish job posts, register for work posts and candidate order posts.

1.1.6 Data Workflow
This module allows you to create workflows for your users. These workflows include the ability for your admins to create custom Onboarding, Pre-screening and General Workflows. Workflows can include Content Pages, custom forms, File Uploads, video profiles, courses and Verification Tasks. You can also add Care Advantage assessments and Police and Work Rights. To add these tasks, check that you have the Apps enabled.

1.1.7 Upskilling
This category has many modules that build the training program that features in your platform. The Framework Manager can build job roles that include core skills, compliance and credentials. You can build your courses and training programs with the Content Publisher and publish upcoming Events and Webinars.

1.1.8 Communication
This category provides access to modules that allows you to publish news to your users, create surveys for interaction and insight. Managers can also communicate with and mentor their team members in group messaging portals.

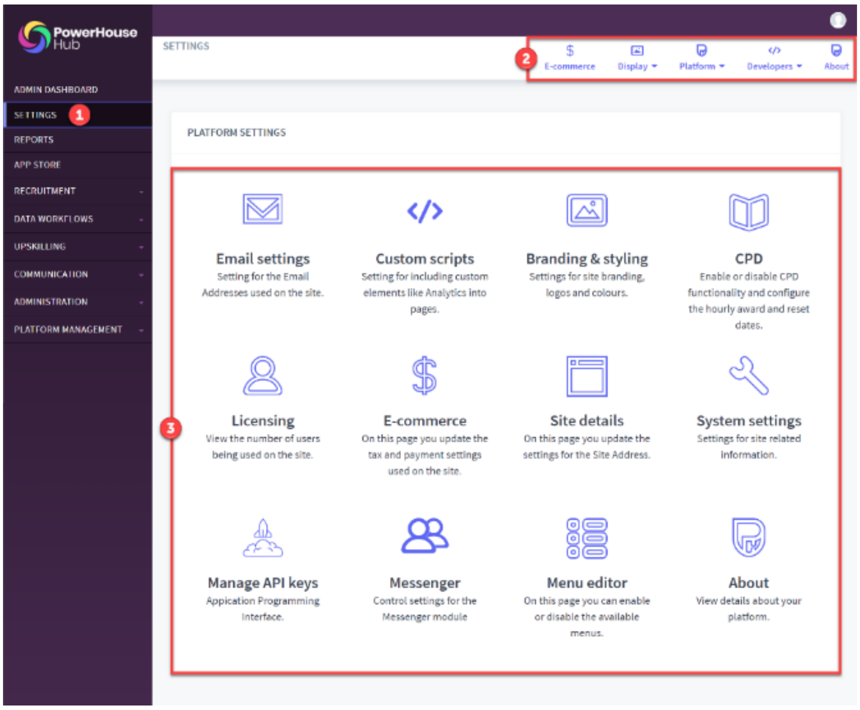
1.1.9 Administration
This category provides access to core admin modules including creating User Accounts; building Group Management for permissions access and reporting purposes and content distribution across the platform; and Group Branding to customise logos that appear on your group dashboards. This module also allows you to edit automated email templates and create relevant certificates to provide evidence of completion across all training.

1.1.10 Platform Management
This category provides access to the Web Content Editor Module which is where you can edit all frontend content on your external web pages including the Login Page and Talent Community portal. The Web Content Editor can be used to tailor your own banners, imagery, and external web pages.

2. Settings

Systems settings are in the Settings parent module on the left-hand navigation.

1. Click on the Settings category
2. Modules have been categorised in the top right-hand menu
3. Modules can be accessed in the grid shortcuts or via the drop-down menus.

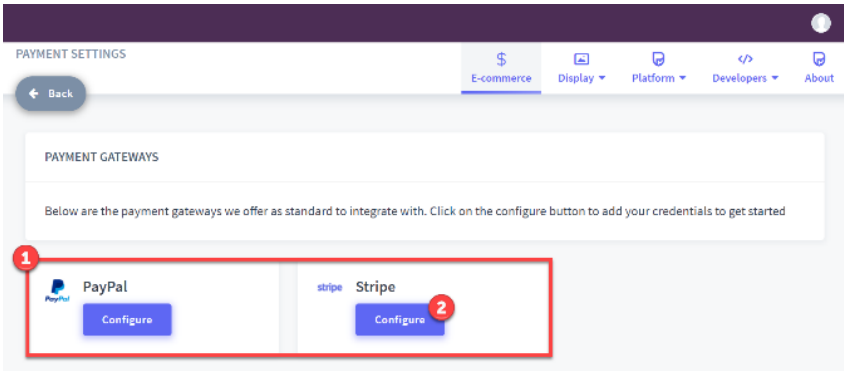


2.1 E-commerce

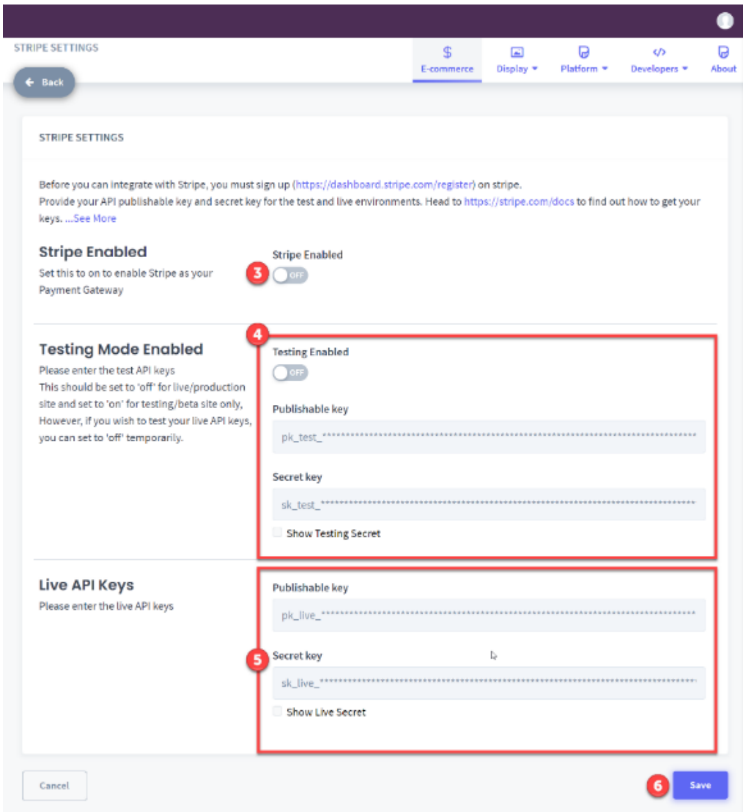
The E-commerce section allows you to update the tax, invoices and ecommerce payments settings used on the site.

2.1.1 Payment Gateways

1. PayPal and Stripe are the two standard payment gateways
2. Click 'Configure' to set up your chosen payment gateway

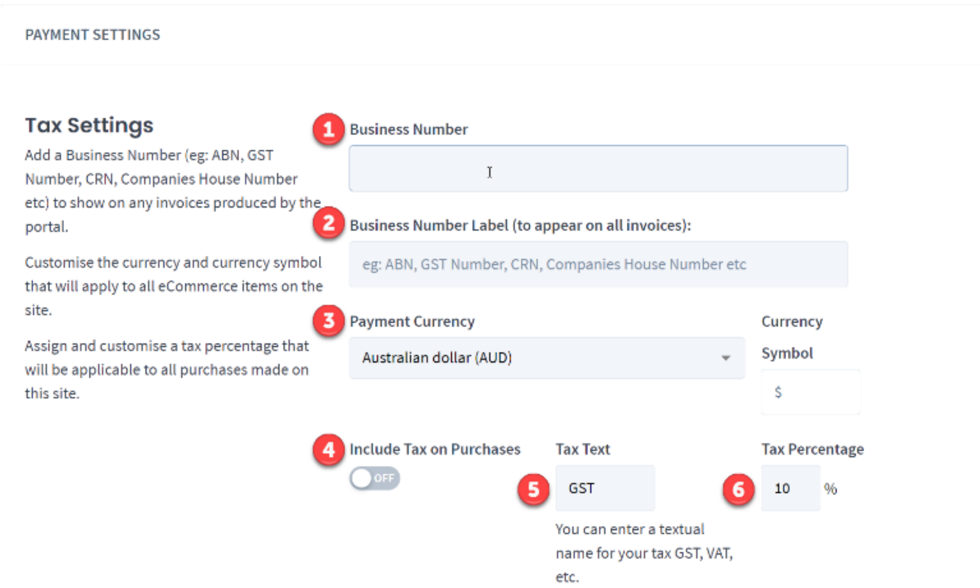


3. When toggled ON, Stripe will be set as your payment gateway
4. When testing, toggle ON and enter your test publish key and secret key. Toggle OFF once testing is complete and you are ready to set your payment gateway live
5. Once testing is complete enter the live publish key and secret key that is provided by Stripe and toggle Stripe Enabled to ON
6. Click 'Save' to save changes



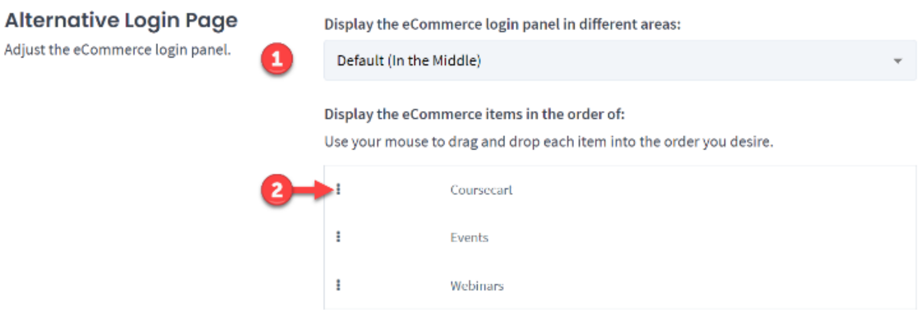
2.1.2 Payment Settings

1. Enter your company business number (ABN, GST, CRN, Companies House etc.)
2. This business number will show on all invoices
3. Select payment currency from drop down box (currency symbol will change automatically)
4. Toggle to include tax on purchases
5. Type in tax text (GST, VAT etc.)
6. Type in the tax percentage



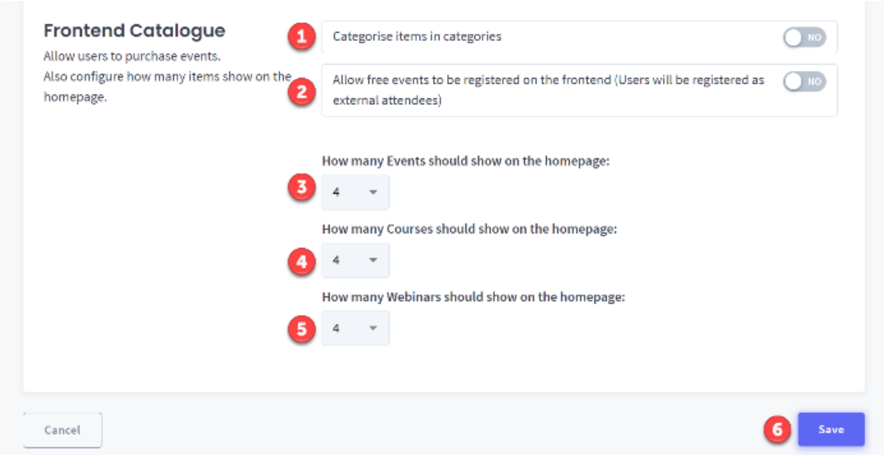
2.1.3 Alternative Login Page

1. Select where you want the eCommerce login panel to be displayed
2. Click and drag hamburger icon to reorder the eCommerce items



2.1.4 Frontend Course Catalogue

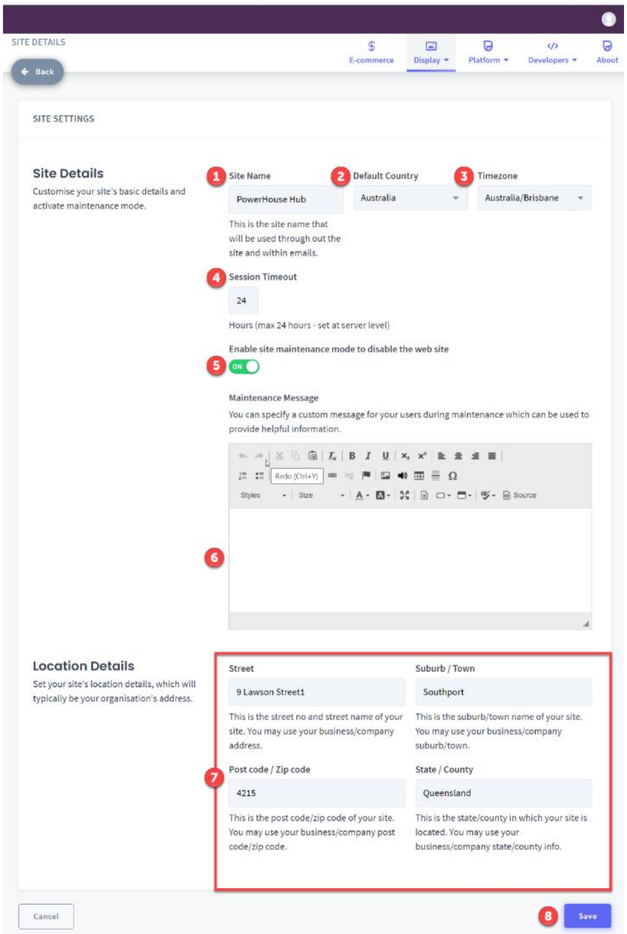
1. Toggle ON if you would like items to be categories
2. Toggle ON to allow users who are not part of the platform can register to events as external attendees
3. Select how many events show on the homepage
4. Select how many courses show on the home page
5. Select how many webinars show on the home page
6. Save your changes



2.2 Display

2.2.1 Site Details

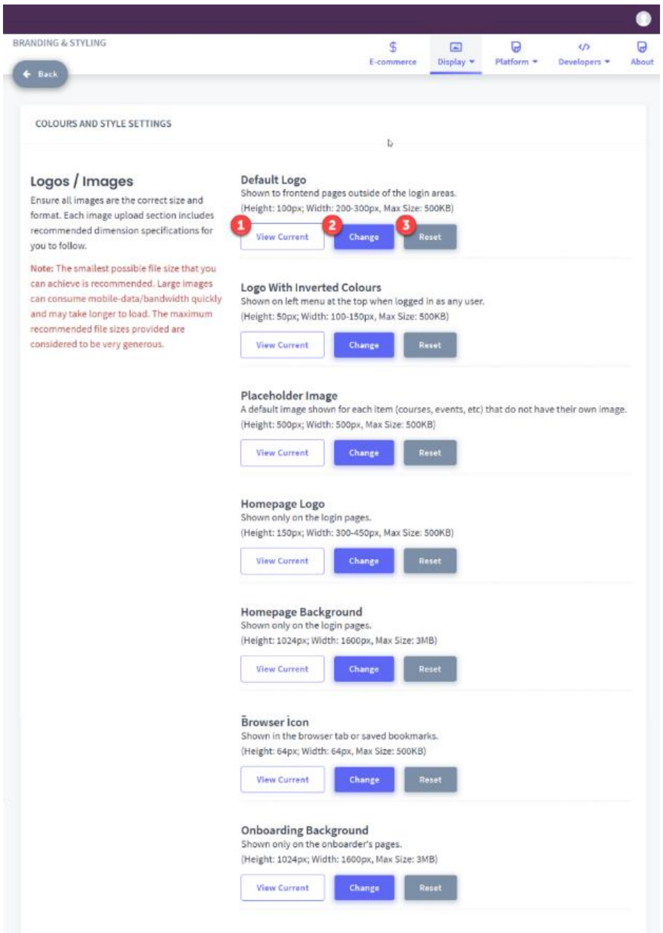
1. Specify the site name that will be used throughout the site and in emails
2. Select default country of your site
3. Select the time zone
4. Set maximum number of hours that the site session will time out
5. Toggle On to enable site maintenance mode
6. When in maintenance mode you can specify a custom message to keep learners and users informed Set your site's location details
7. Set your site's location details. This is typically your business address
8. Click 'Save' to save your changes



2.2.2 Branding & Styling

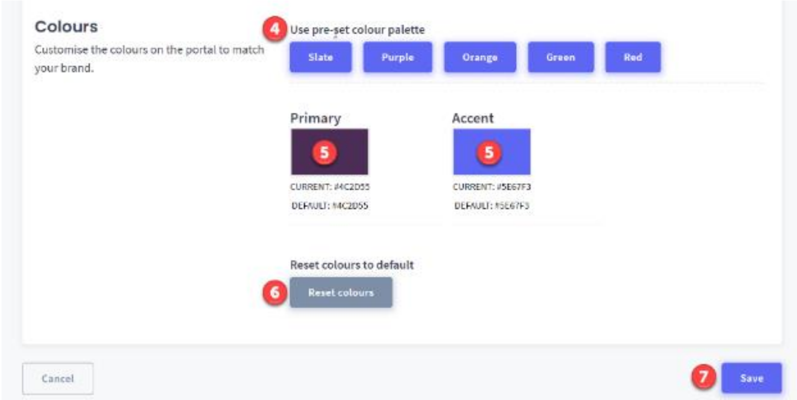
2.2.2.1 Update logos and images

1. View Current – displays the current image
2. Change – Ability to upload a new image
3. Reset



2.2.2.2 Colours

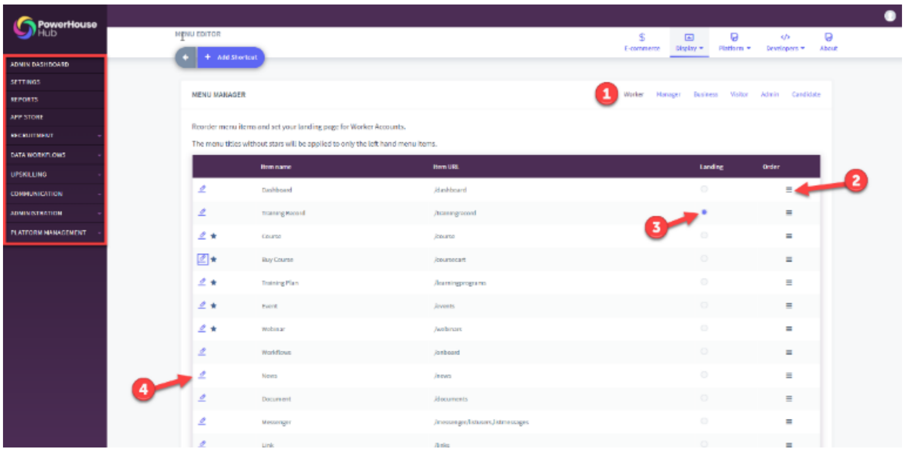
4. Pre-set colour palette
5. Click the Primary or Accent colour palette and enter Hex Code or use the colour slider
6. Reset colours to default
7. Save changes



2.2.3 Menu Manager

Allow administrator to reorder and rename Parent modules (parent modules are shown in the red box in the below image) and set your landing page for all users. The menu titles without stars will be applied to only the left-hand menu items.

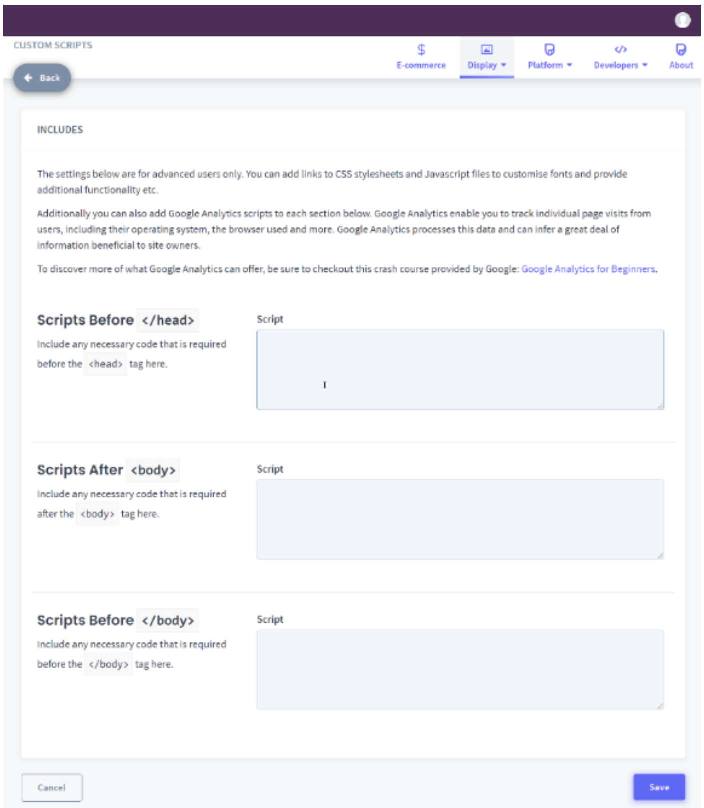
1. Select the user tab you would you like to change
2. To reorder modules, click on the hamburger icon and drag into position
3. Select radio icon for the module that you wish to be the landing page
4. To edit the module name, click on the edit button



2.2.4 Custom Scripts

Custom Scripts are for advanced users only. You can add links to CSS stylesheets and Javascript files to customise fonts and provide additional functionality.

Google Analytics scripts can be added to track page visits and much more. Google Analytics processes this data, which can be extremely beneficial for site owners.

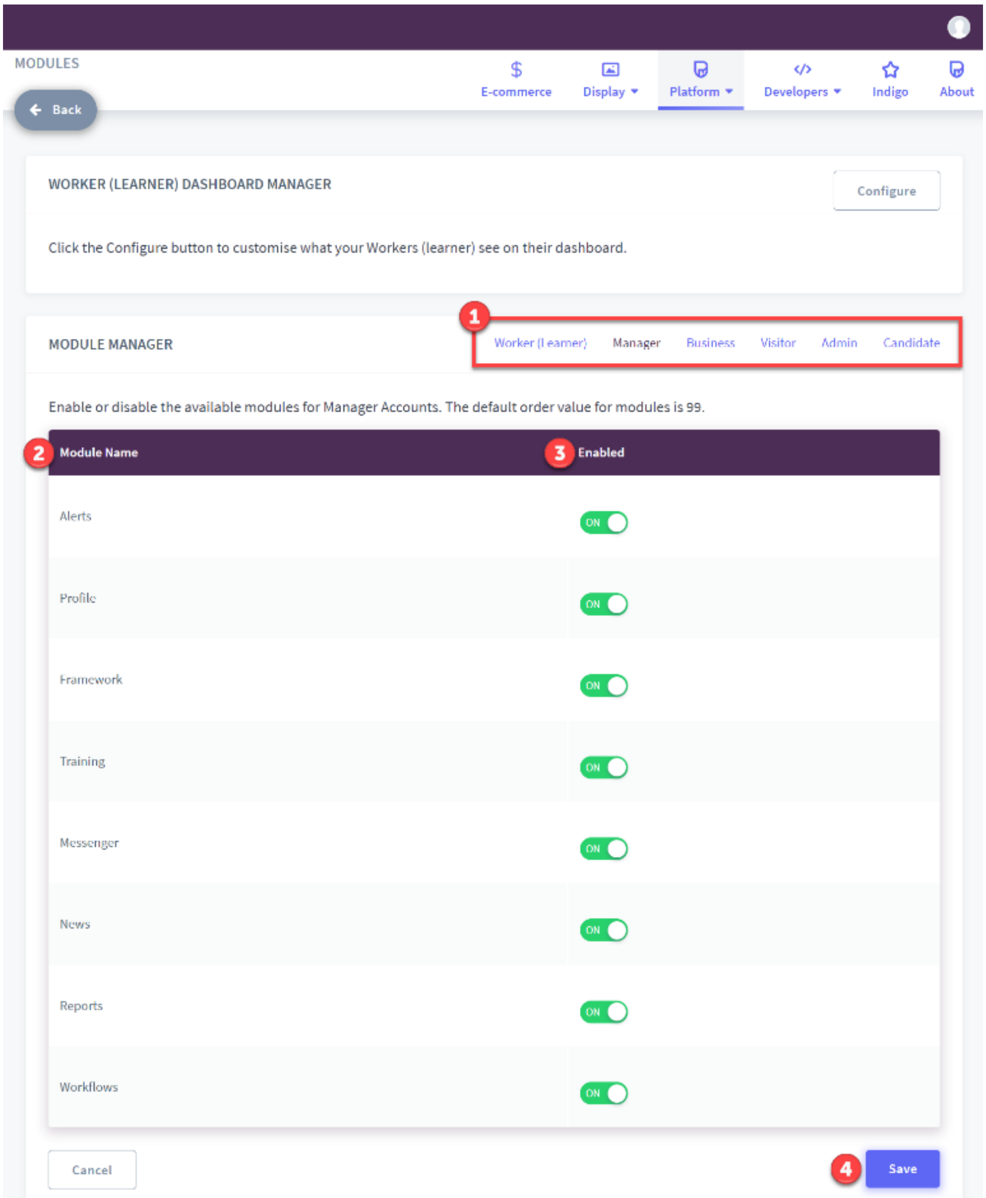


2.3 Platform

2.3.1 Modules

The modules tab allows you to configure the modules that learners, managers, businesses, visitors, admins and candidates have access to in the left-hand navigation.

1. Select the user type that you want to give or remove access for
2. Find the appropriate module in the list
3. Toggle ON to allow access and toggle OFF to remove access to the module
4. Click 'Save' to save changes

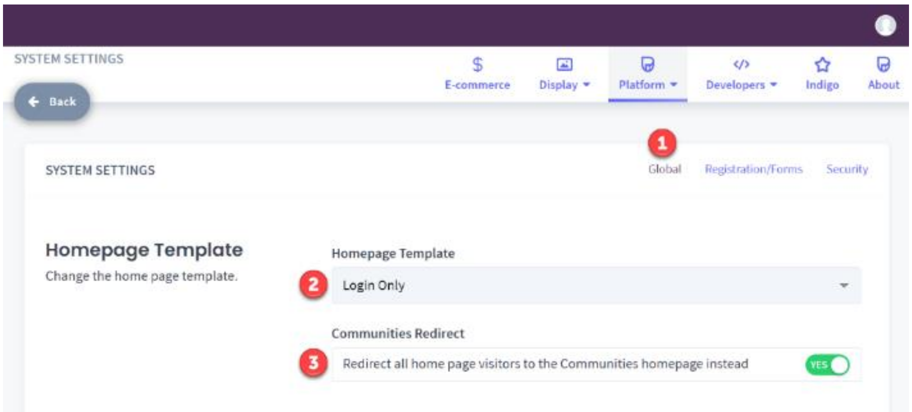


2.3.2 System Settings - Global

Allow you alter your site's global settings, registration forms and security. We will break down each system setting so you can set your site up exactly as you need.

2.3.2.1 Homepage Template

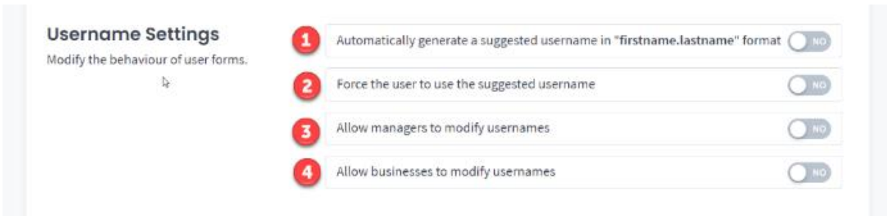
1. Click the ‘Global’ link
2. Select which home page template you would like your site to have.
    - Login with registration allows external users to register to the platform
    - eCommerce enables you to sell and users to purchase eCommerce items from login page
    - Visitor allows visitor to login to the platform
3. Toggle recruit integration ON to redirect all home page visitors to the community homepage



2.3.2.2 Username Settings

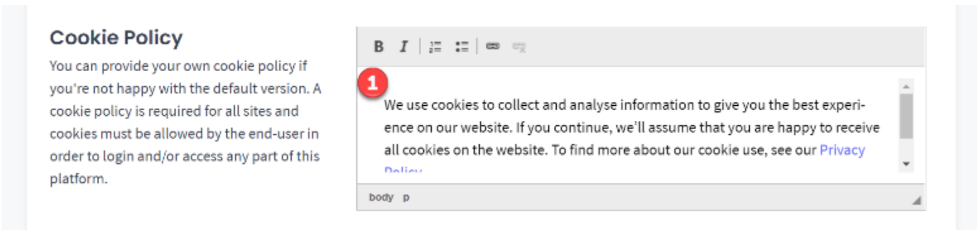
Here you can modify the behavior of user forms

1. Toggle ON to automatically generate a username in “firstname.lastname” format
2. Toggle ON so the user cannot alter their username
3. Toggle ON to allow mangers to modify usernames
4. Toggle ON to allow businesses accounts to modify usernames associated with their account



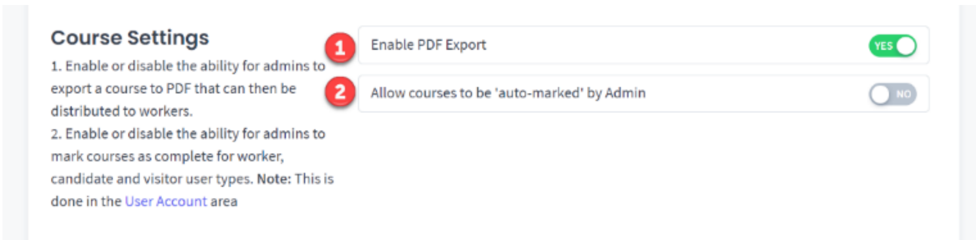
2.3.2.3 Cookie Policy

1. You can type your own cookie policy if you’re not happy with the default version.



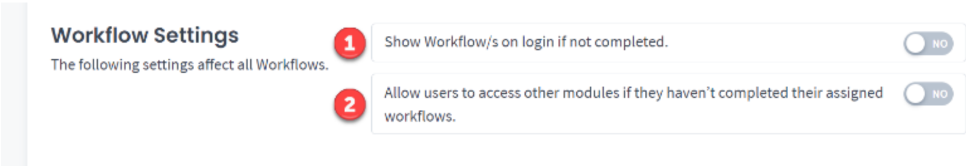
2.3.2.4 Course Settings

1. Toggle ON to enable admins to export a course to PDF
2. Toggle ON to enable admins to mark courses as complete for worker, candidate and visitor user types



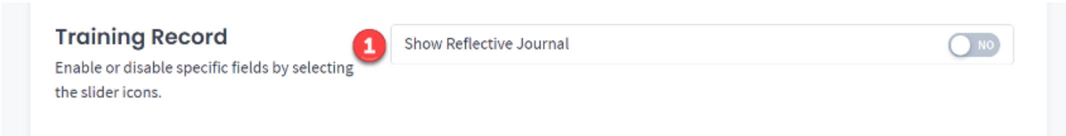
2.3.2.5 Workflow Settings

1. Toggle ON to view learners that haven’t completed their assigned workflows upon login
2. Toggle ON to allow users to access other modules if they haven’t completed their assigned workflow. This is not recommended



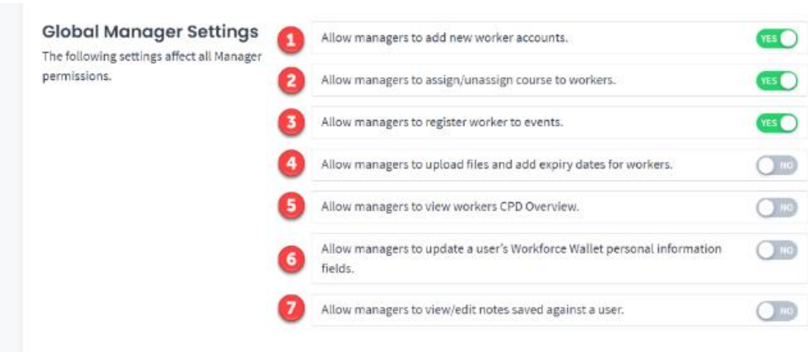
2.3.2.6 Training Record

1. Toggle ON to enable or disable specific fields



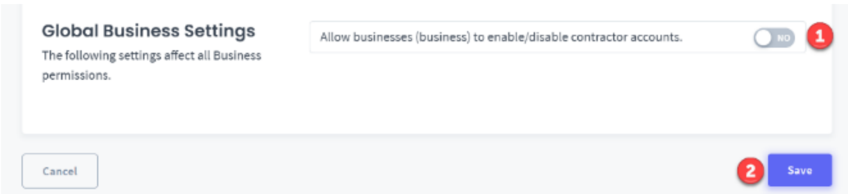
2.3.2.7 Global manager settings

1. Toggle ON to allow managers to add new worker accounts
2. Toggle ON to allow managers to assign/unassign courses to workers
3. Toggle ON to allow managers to register workers to events
4. Toggle ON to allow managers to upload files and add expiry dates for workers
5. Toggle ON to allow managers to view workers CPD overview
6. Toggle ON to allow managers to update a user's workforce wallet personal information fields
7. Toggle ON to allow to view/edit notes saved against a user



2.3.2.8 Global Business Settings

1. Toggle ON to enable contractor accounts. This option is beneficial if you don't want to create contractor accounts
2. Click save changes to save any changes made.



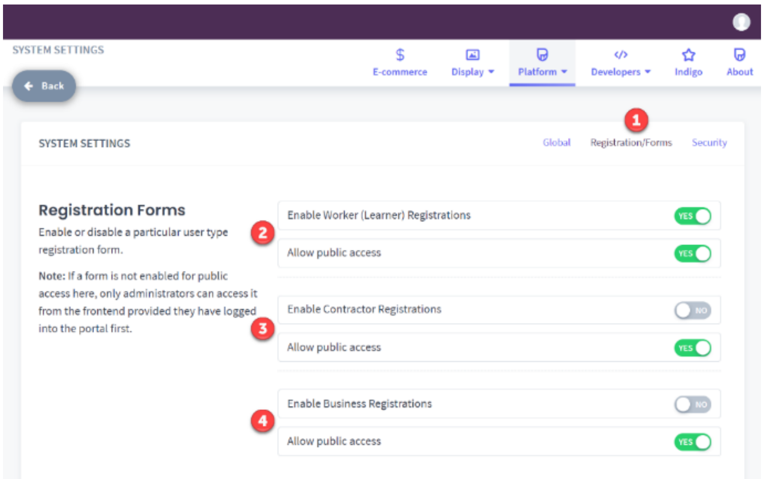
2.3.3 System Settings - Registration Forms

2.3.3.1 Registration Forms

Enable or disable a particular user type registration form.

Note: If a form is not enabled for public access here, only administrators can access it from the frontend provided they have logged into the portal first.

1. Click the 'Registration/Forms' link in the right-hand navigation
2. There are two toggle options for Worker Registrations. The top toggle is to enable Worker Registrations. The second toggle is to allow public access for Worker Registrations
3. There are two toggle options for Contractor Registrations. The top toggle is to enable Contractor Registrations. The second toggle is to allow public access for Contractor Registrations

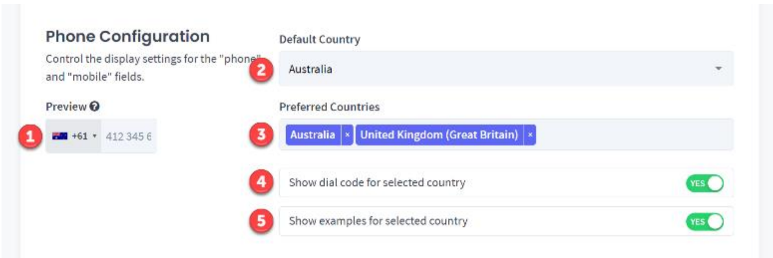


4. There are two toggle options for Business Registrations. The top toggle is to enable Business Registrations. The second toggle is to allow public access for Business Registrations

2.3.3.2 Phone Configuration

Phone configuration settings control the display settings for the "phone" and "mobile" fields inside any form across the platform. This means when a form requests a phone number, the country code will be displayed inside the phone field.

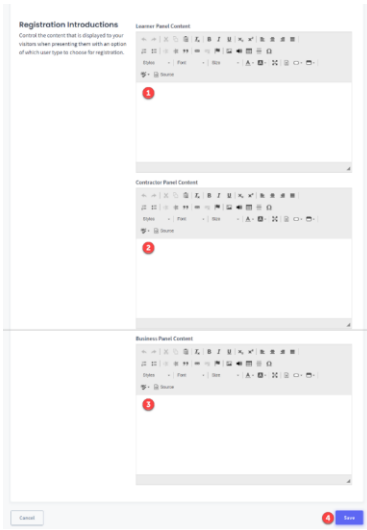
1. Click on the country flag display under 'Preview' to select the appropriate country
2. Select the default country to match the preview
3. Select your preferred countries. Multiple countries can be selected by holding Ctrl (for Windows) or Command (for Mac) then select the required countries
4. Toggle ON if you would like to show the dial code for selected countries
5. Toggle ON to show examples for selected country



2.3.3.3 Registration Introductions

Control the content that is displayed to your visitors when presenting them with an option of which user type to choose for registration.

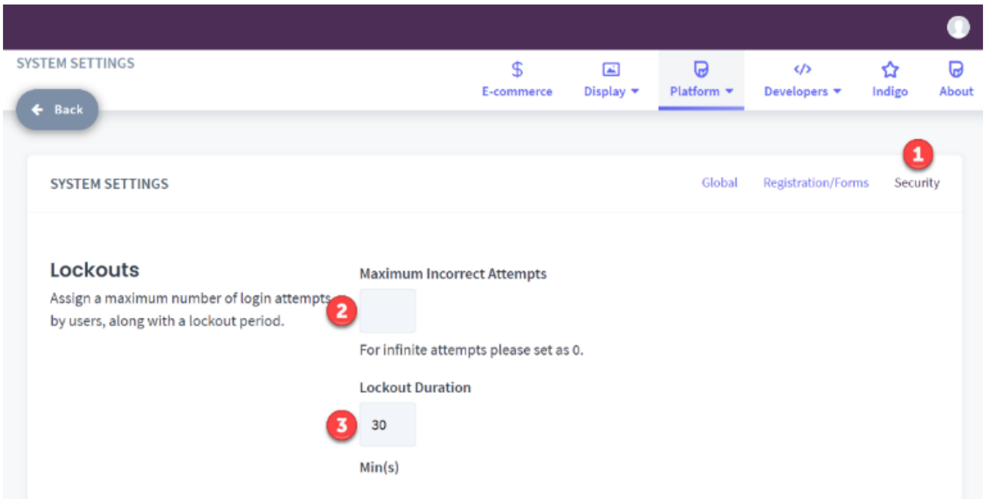
1. Type your introduction for learner panel content
2. Type your introduction for contractor panel content
3. Type your introduction for business panel content



2.3.4 System Settings – Security

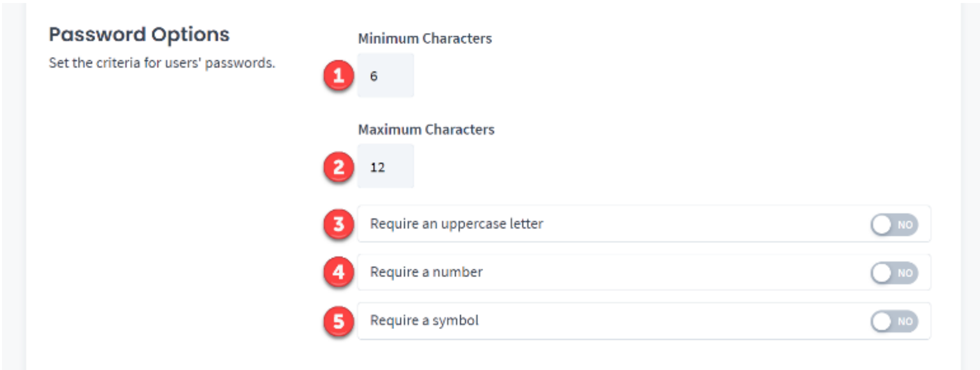
2.3.4.1 Lockouts

1. Navigate to the Security link in the right-hand menu
2. Assign a maximum number of login attempts by user, along with a lockout period. For infinite attempts set to 0
3. Set lockout duration. This will activate once a user has reached the maximum number of login attempts



Password Options

1. Set the minimum characters for users' passwords
2. Set the maximum characters for users' passwords
3. Toggle YES if passwords require an upper-case letter
4. Toggle YES if passwords require a number
5. Toggle YES if passwords require a symbol

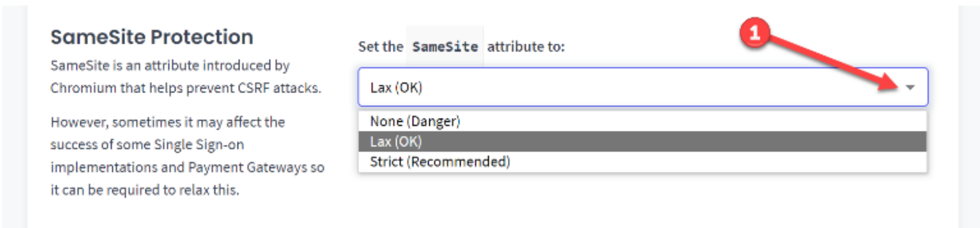


2.3.4.2 SameSite Protection

SameSite is an attribute introduced by Chromium that helps prevent CSRF attacks.

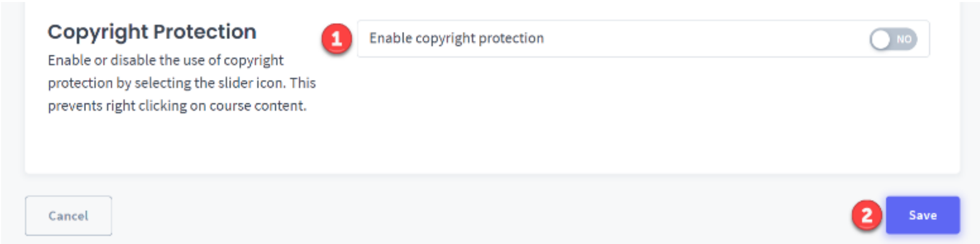
However, sometimes this may affect the success of some Single Sign-on implementations and Payment Gateways so it can be required to relax this setting.

1. Click on the drop-down box and select an option



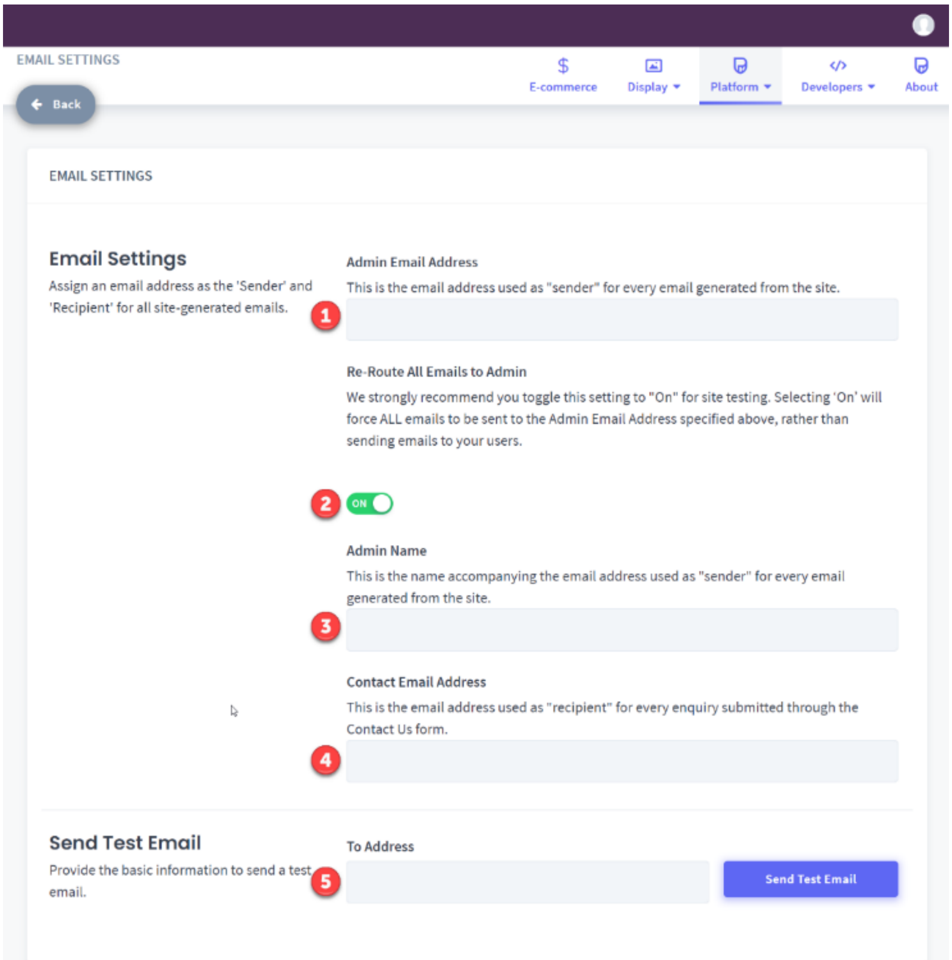
2.3.4.3 Copyright Protection

1. Toggle YES to enable the use of copyright protection. This prevents right clicking on course content or any learning material in the platform
2. Click ‘Save’ to save any changes made in the Security section



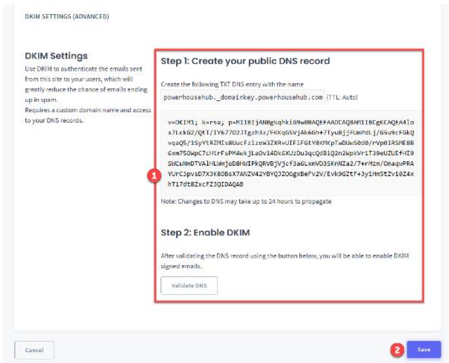
2.3.5 Email Settings

1. Admin Email Address - This is the email address used as "sender" for every email generated from the site
2. Re-Route All Emails to Admin - ‘On’ will force ALL emails to be sent to the Admin Email Address specified above, rather than sending emails to your users
3. Admin Name - This is the name accompanying the email address used as "sender" for every email generated from the site
4. Contact Email Address - This is the email address used as "recipient" for every enquiry submitted through the Contact Us form
5. Send Test Email



2.3.5.1 *DKIM Settings (Advanced)*

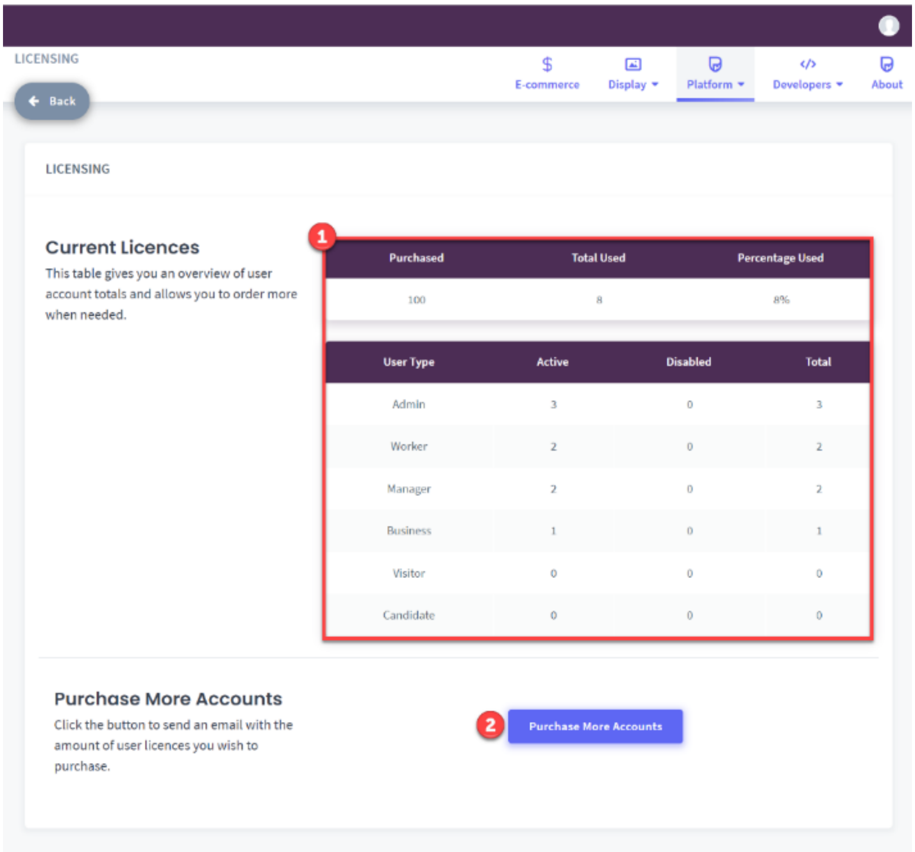
1. Use DKIM to authenticate the emails sent from this site to your users, which will greatly reduce the chance of emails ending up in spam. Both steps need to be completed.
2. Click to ‘Save’ your changes



2.3.6 Licensing

This module allows you to view the number of users being used on the site

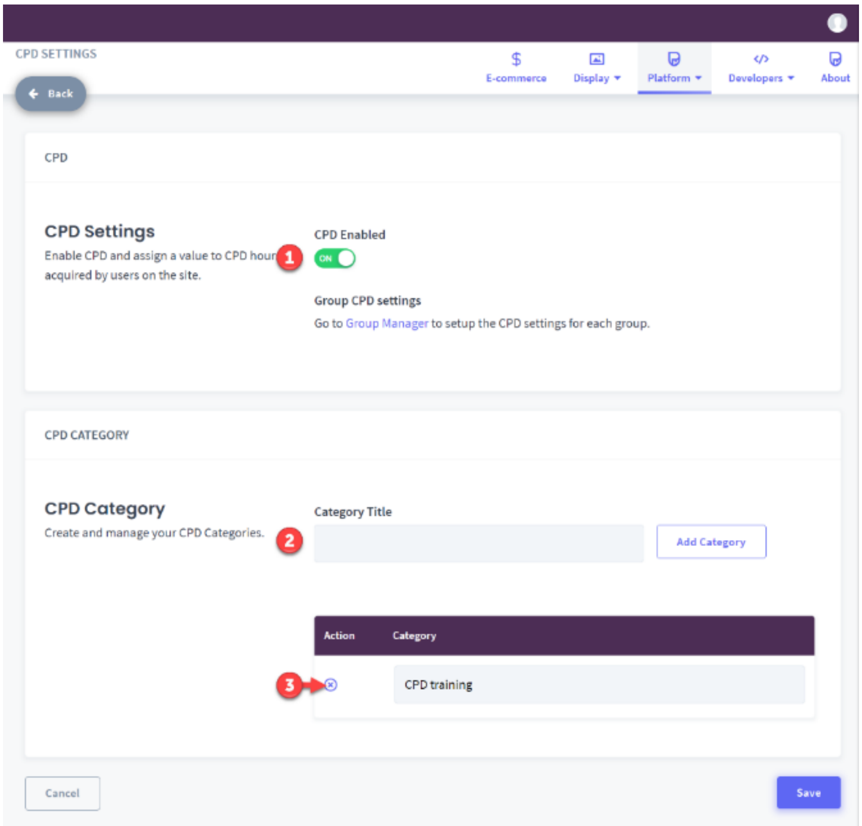
1. Gives you an overview of your current licenses
2. To purchase more accounts, click the button



2.3.7 CPD

Enable or disable CPD functionality, configure the hourly award and reset dates.

1. CPD settings need to be enabled before you can set CPD settings in Group Manager
2. To add a new category, type in a tile and click add category
3. Click 'X' to delete a category
4. Save changes

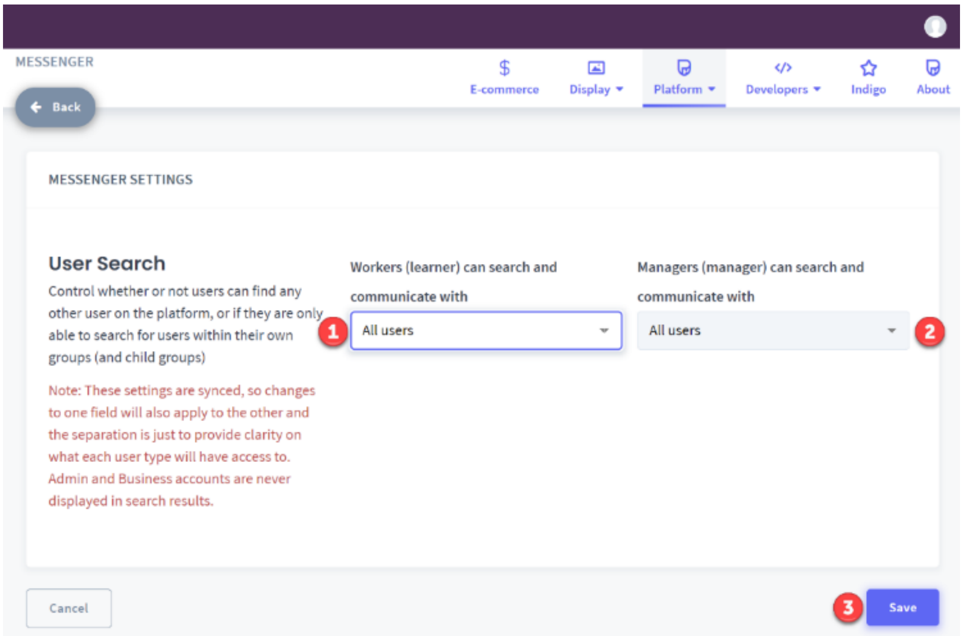


2.3.8 Messenger

Control whether users can find any other user on the platform, or if they are only able to search for users within their own groups (and child groups)

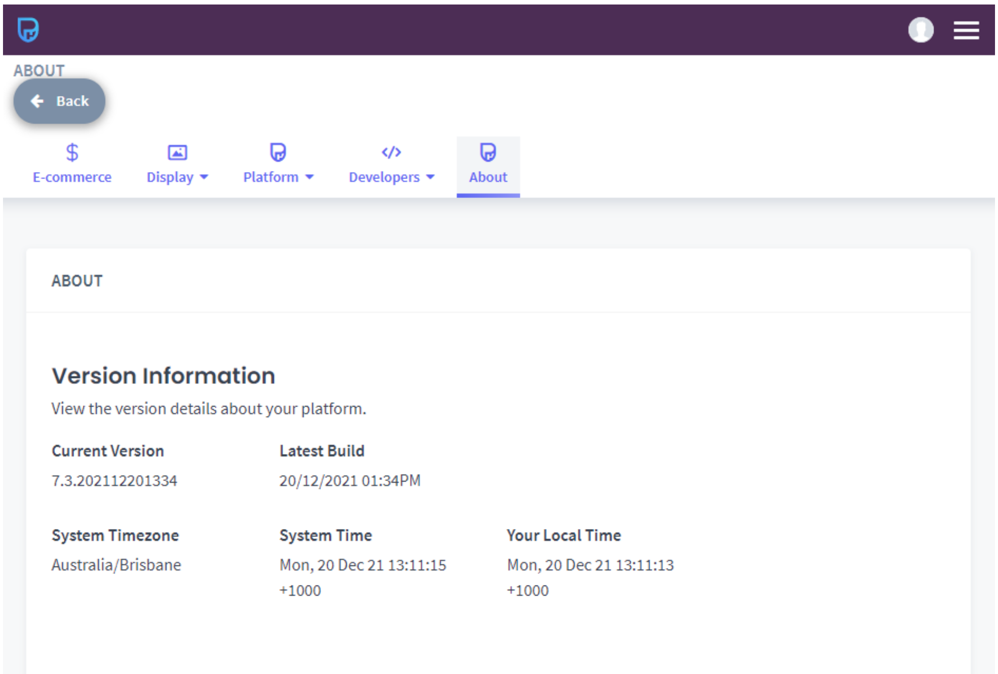
Note: These settings are synced, so changes to one field will also apply to the other and the separation is just to provide clarity on what each user type will have access to. Admin and Business accounts are never displayed in search results.

1. Click the drop-down box to select who the Learners can communicate with
2. Click the drop-down box to select who the Manger's can communicate with.
3. Click 'Save' to save changes



2.3.9 About

'About' provides information regarding your software.



3. Reports

Once your learners have begun to submit results, you will be able to view their results in a meaningful way. To do this, PowerHouse Hub offers various inbuilt reports that interrogate the database of results to provide a range of information.

These reports are:

Course / Assessment Reports

1. Generate a report on users who have submitted and have passed or failed (courses with assessments).
2. Generate a report on users who have been created that have not submitted (courses with assessments).
3. Generate a report on users who have submitted a survey from a certain date to another date.
4. Generate a report on users who have attempted an assessment and failed.
5. Generate a report on users who have not yet completed a course (with or without assessments).
6. Generate a report on users who have submitted results for a SCORM object.
7. Generate a report on users who have completed a Scenario which shows the traversal path.
8. Generate a report on users who have passed or failed a course (with or without assessments).
9. Generate a report on the cumulative training time by users who have passed courses.
10. Generate a report on users who have courses due to expire or due for re-induction.
11. Generate a report on historical data for users who have completed a course with re-induction settings.

Dashboard Survey Reports

12. Generate a report on users who have submitted results for a Dashboard Survey.

Documents Reports

13. Generate a report on users who have downloaded documents from the Document Library.

Event Reports

14. Generate a report on users who have registered for events.
15. Generate a report on users who have registered for and attended events.
16. Generate a report on users who have registered for and failed to attend events.

Training Plan Reports

17. Generate a report on users who have Started, Completed, or Not Started a Training Plan.
18. Generate a report on historical data for users who have completed a Training Plan with re-induction.

Workflow Reports

19. Generate a report on users who have been assigned to Workflows.

Framework Reports

20. Generate a report on user's completion status who have been assigned to Frameworks.
21. Report on completion status on users who have been assigned to Frameworks with Workflows.

Workforce Insights Reports

22. Generate a report on results from Workforce Insights from a certain date to another date.

User Reports

23. Generate report on number of logins for users in groups.
24. Generate report on all user notes for users in groups.

25. Generate report on user registration from a certain date to another.

Group Reports

26. Generate report on number of users within each group.

Training Record Reports

27. Generate report on external training records provided by each user.

User Upload Reports

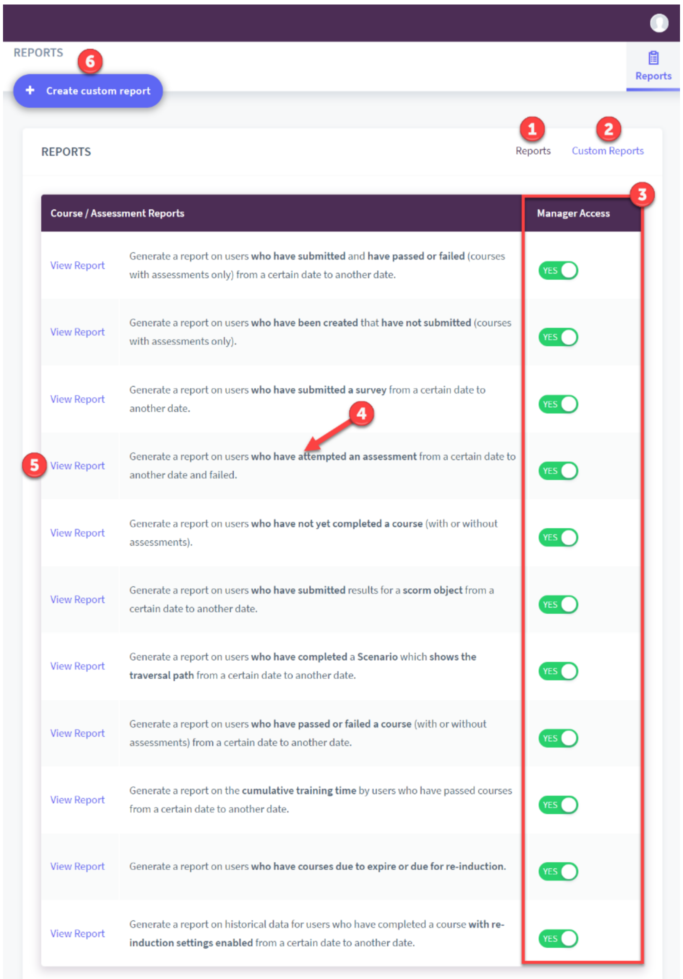
28. Generate a report on User Uploads

Recruitment Reports

29. Generate a report that shows statistics about each job within Recruit.
30. Generate a report that shows successful candidates along with their Recruiters.

3.1 Accessing and Configuring Reports

1. Displays the reports for each module
2. Displays custom reports
3. You can choose if the manager user type has access to these reports
4. View the description of the report
5. Click 'View Report' to view the individual report
6. Click 'Create custom report' to create your own report

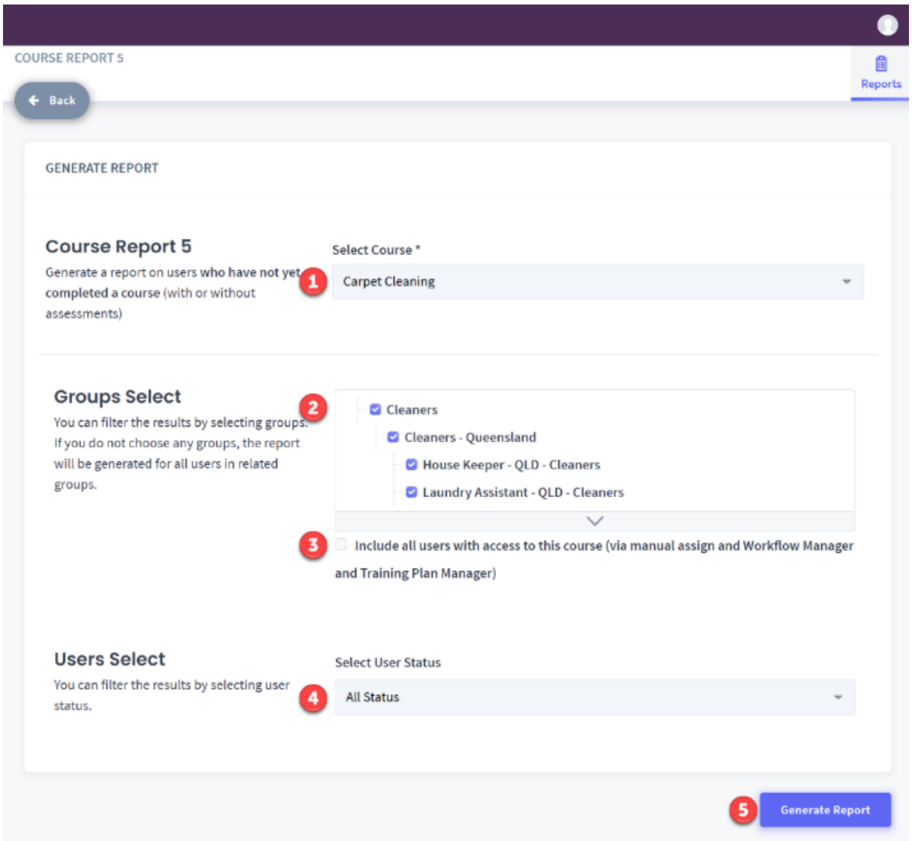


3.2 Generating a Report

You can generate a report by selecting 'View Report' (point 5 above). The below example is to run a report on users who have not yet completed a course. Each report may have a slightly different layout but works in the same way.

1. Select a course from the drop-down menu
2. Select the group(s) that you want to run the report for
3. Select tick box to include all users with access to the course (via manual assign, workflow manager and training plan)
4. Select the user status from the drop-down box

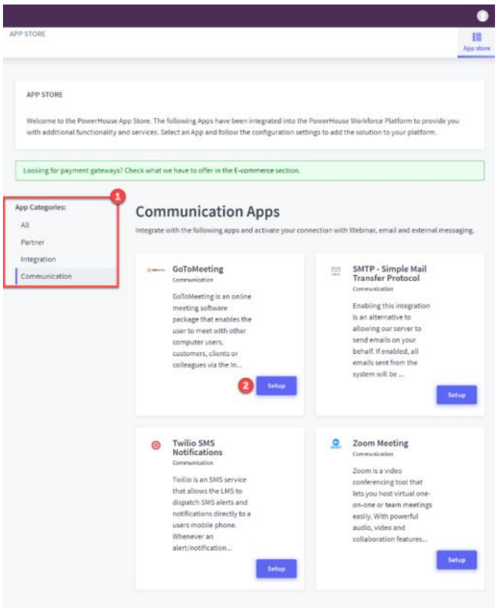
5. Click ‘Generate Report’



4. App Store

The following Apps have been integrated into the PowerHouse Upskill Platform to provide you with additional functionality and services. Select an App and follow the configuration settings to add the solution to your platform.

1. Filter Apps by Partner Apps, Integration Apps or Communication Apps
2. Click ‘Setup’ to integrate the App with your platform

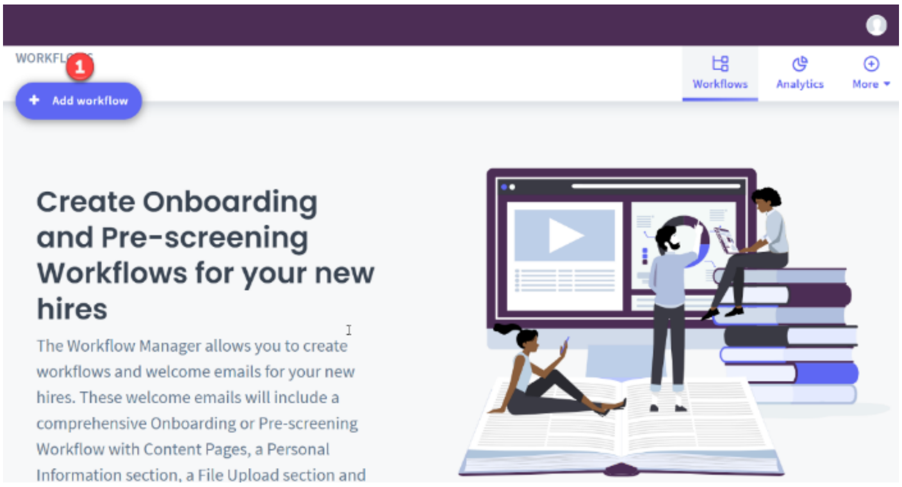


5. Data Workflows

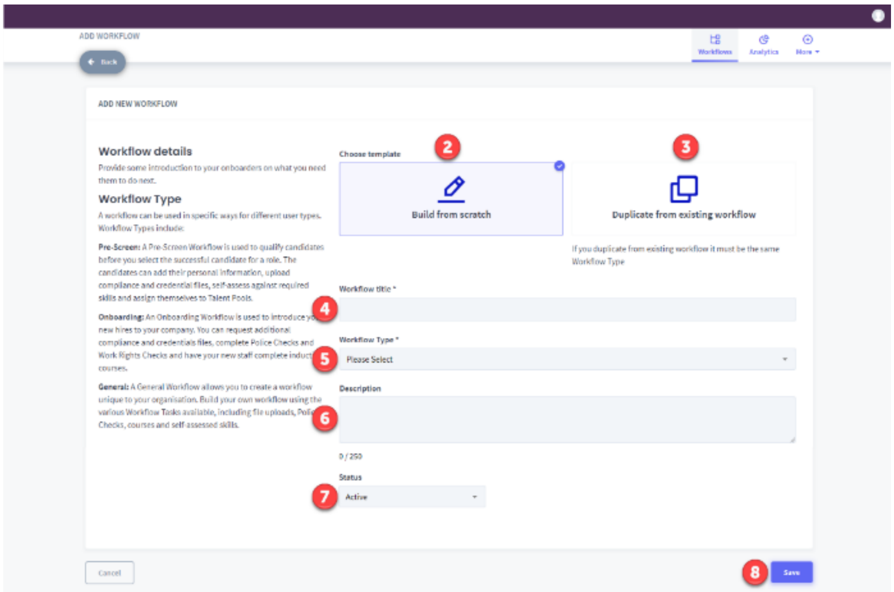
5.1 Workflow Manager

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 can 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 your own workflow, 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. The options 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.

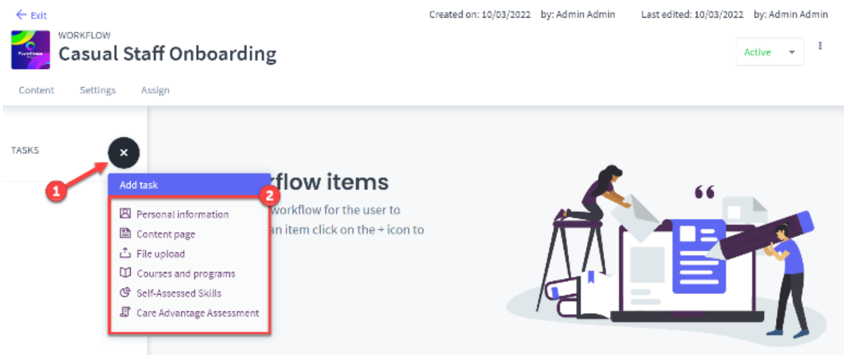
   General: A General Workflow allows you to create a workflow unique to your organisation. Build your own workflow using the various Workflow Tasks available, including File Uploads, Police Checks, Courses and Self-Assessed Skills.

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

5.1.1 Adding Workflow Items

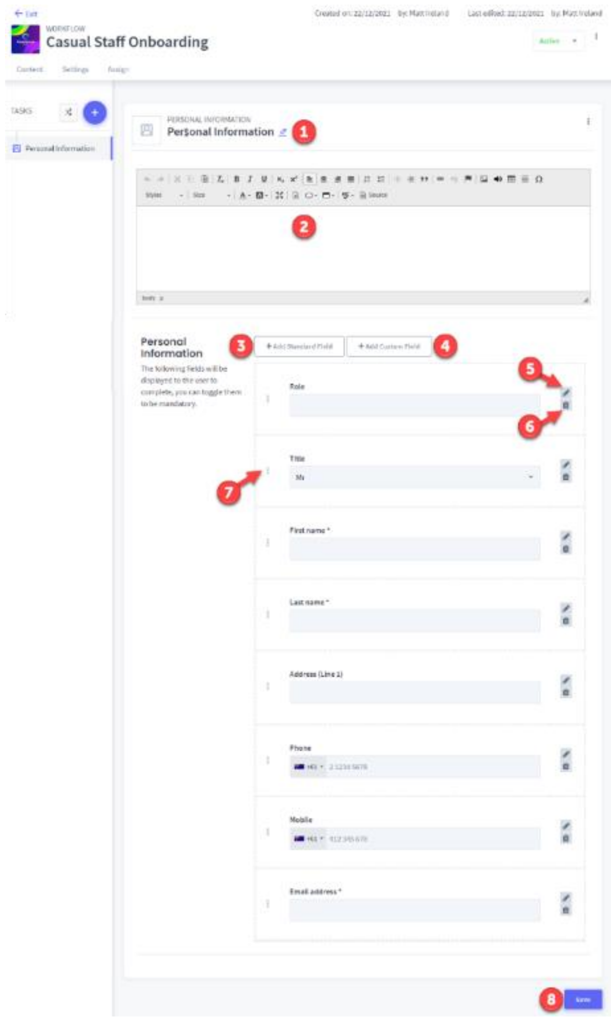
This is where you can add items to your workflow for the user to complete.

1. To add an item, click on the '+' button
2. Select the required task



5.1.2 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.



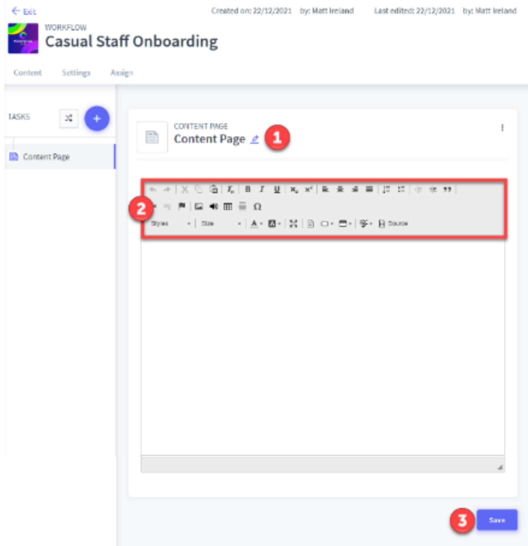
Before populating this task, ensure you have created Custom Fields for your personal information form.

1. To change the title, click the edit icon, type in the desired title, and click the 'Save' button
2. In the CK Editor, add a brief description regarding the user's 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 the field. Add a new title in the custom title field and click the 'Rename field' button
6. Click 'Remove field' to delete the field from the form
7. Click and drag the hamburger option on the left-side to reorder fields
8. When all required fields are showing click 'Save'

5.1.3 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 the 'Save' button
2 Use the options in the CK Editor to make your content more appealing
3 Once finished click the 'Save' button

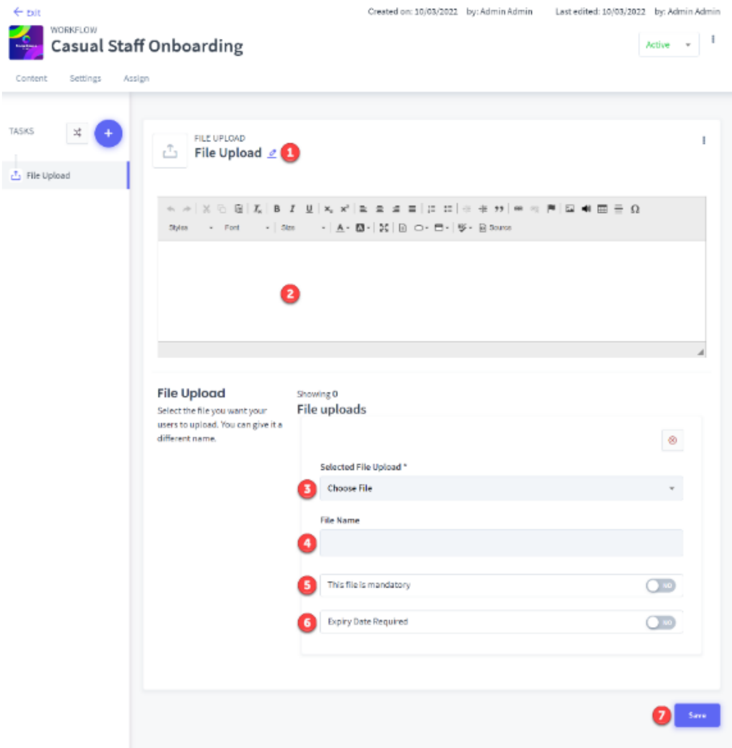


5.1.4 File Uploads

File Uploads is where candidates can upload documents to ensure they are 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 the 'Save' button
2. Provide a general introduction in the CK Editor that explains what you want the user to do
3. Select the file upload
4. Name the file
5. Toggle YES if you want the file upload to be mandatory
6. Toggle YES is if the file has an expiry date (for example, driver licenses and CPR certificates have expiry dates)
7. Click 'Save' to save changes. To add an additional File Upload task to your workflow, add another File Upload workflow item

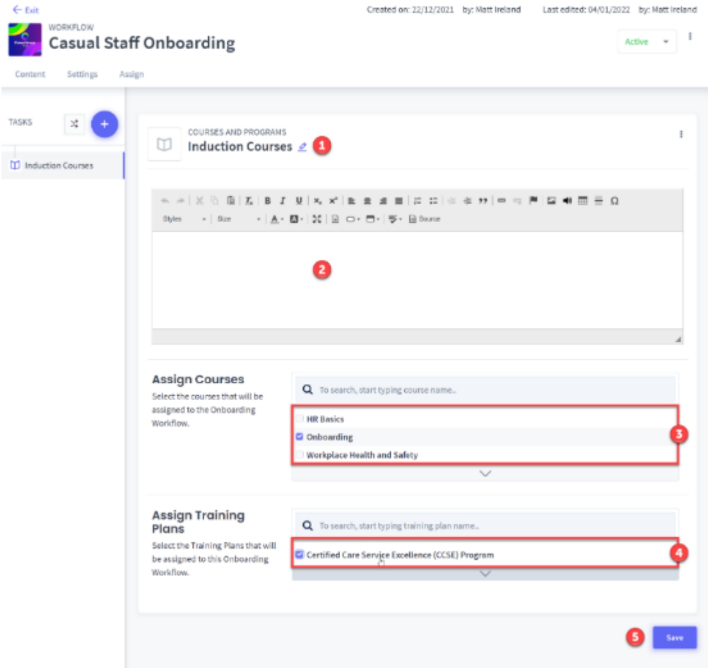


5.1.5 Induction Courses

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.

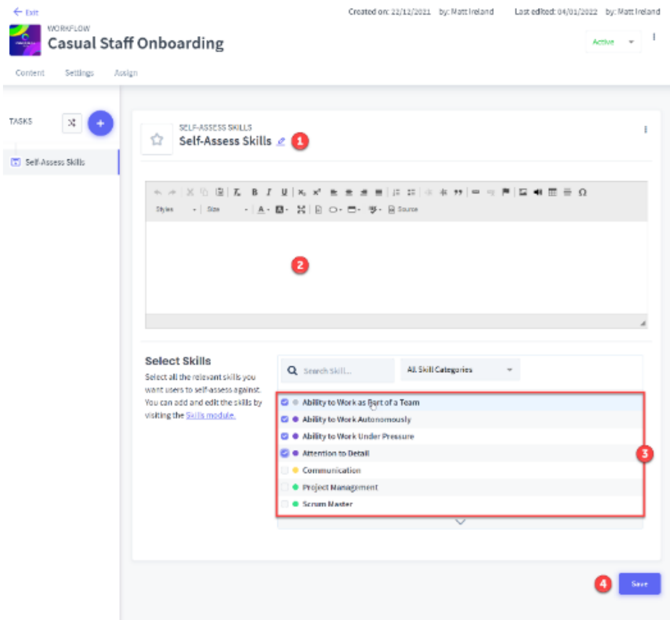
1. To change the title, click the edit icon, type in the desired title, and click the 'Save' button
2. Provide a general introduction in the CK Editor that explains what you want the user to do
3. Select the course(s) that will be assigned to the workflow
4. Select the Training Plans that will be assigned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



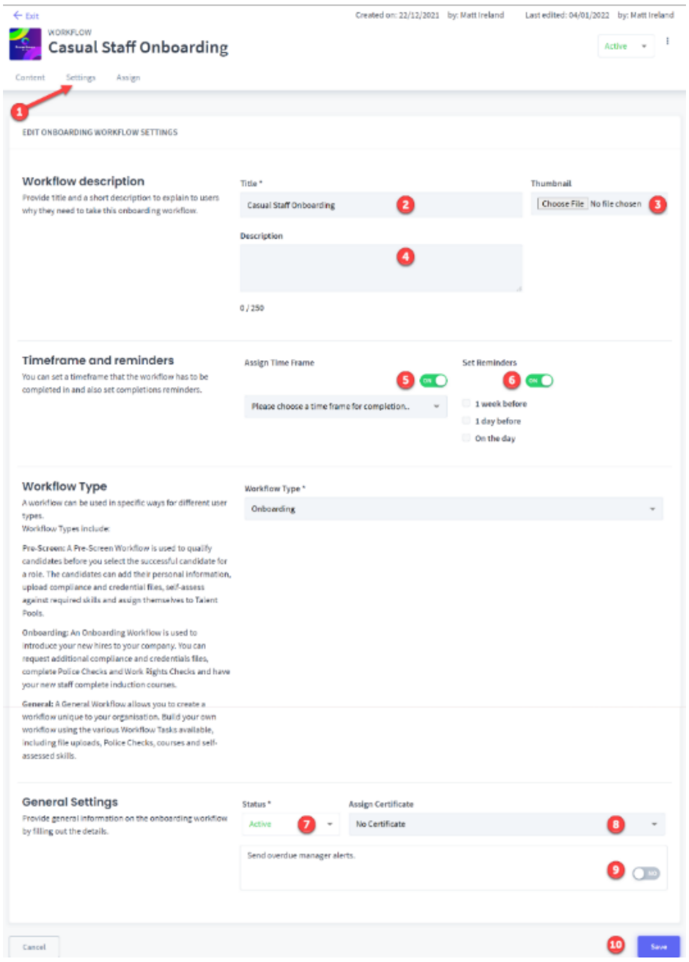
5.1.6 Self-Assessed Skills

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 the '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



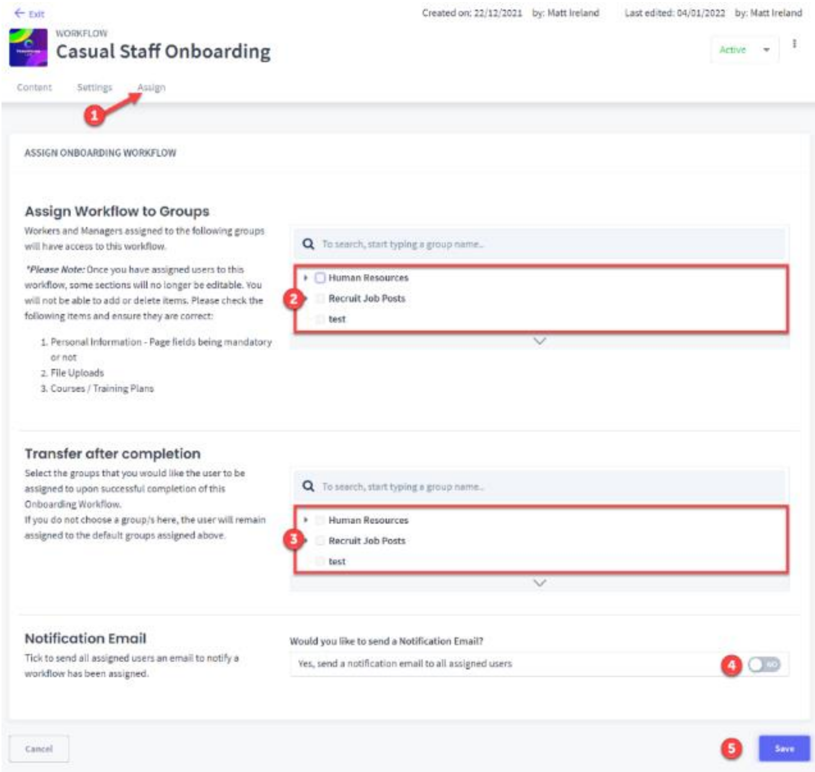
5.1.6 Workflow Settings



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 the 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. Change the 'Status' if required. Active means workflow is live and can be viewed by the learner. Disabled means users won't 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

5.1.7 Assigning Workflows

Please Note: Once you have assigned users to this workflow, some sections will no longer be editable. At this stage, 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 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

6 Upskilling

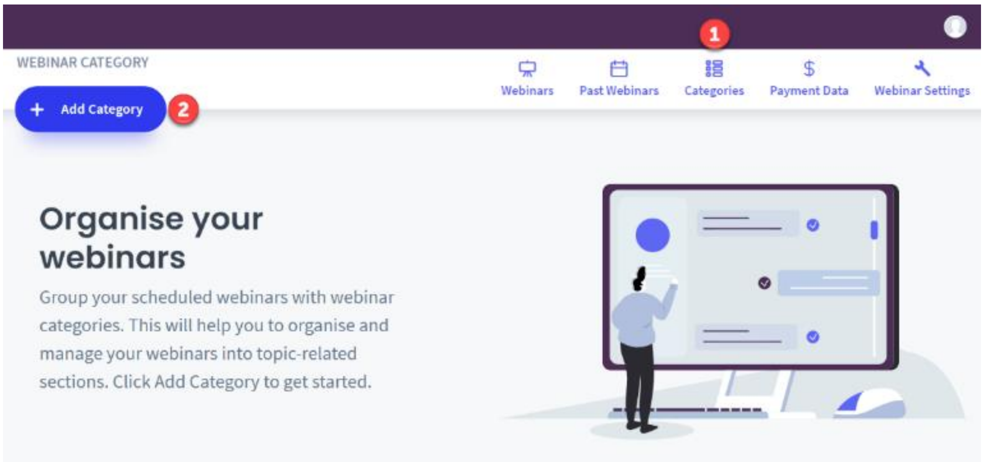
6.1 Webinar Manager

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.

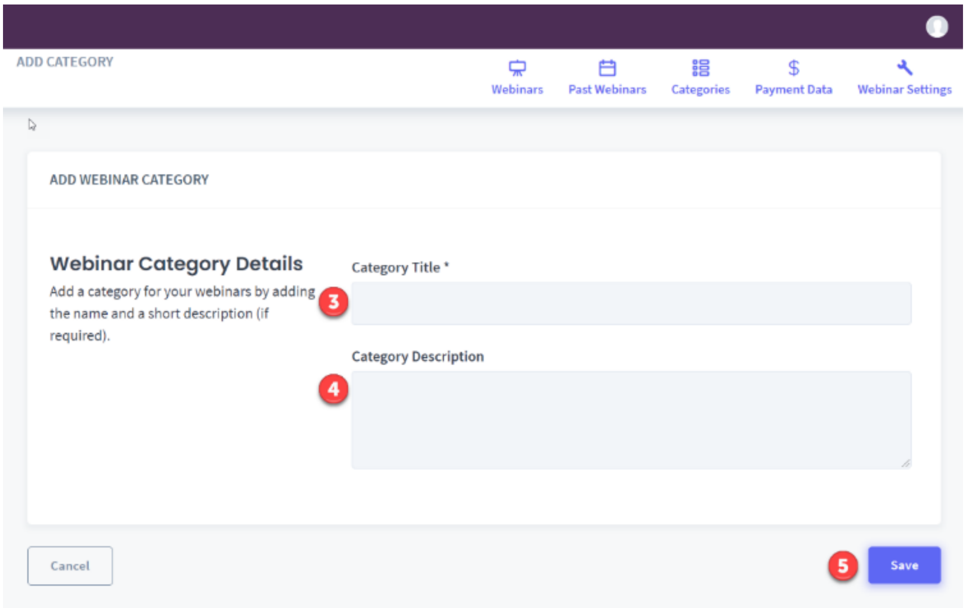
6.1.1 Creating Categories

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'

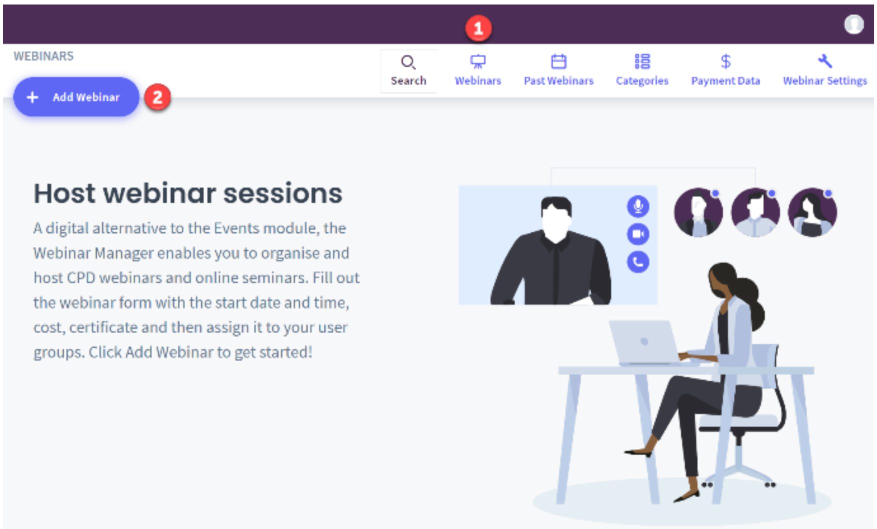


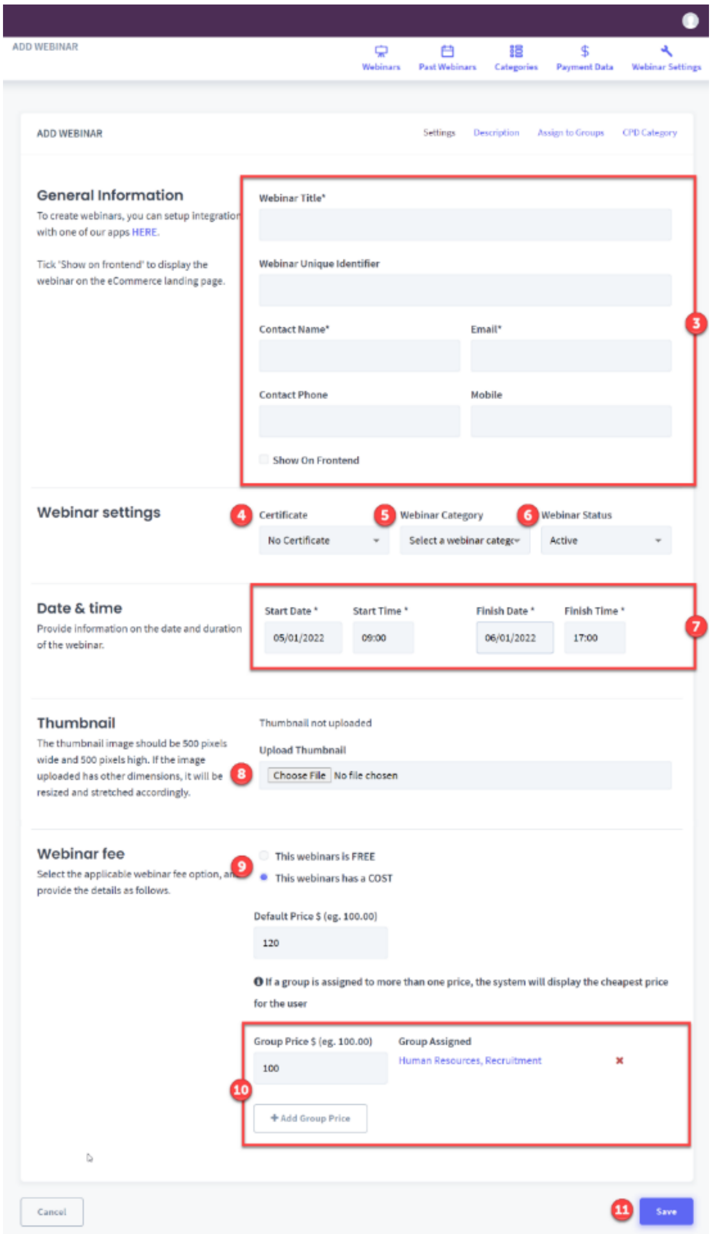
3. Add the category title
4. Add a category description
5. Click 'Save' to save changes



6.1.2 Add Webinar

1. Click on the 'Webinars' tab
2. Click 'Add webinar'

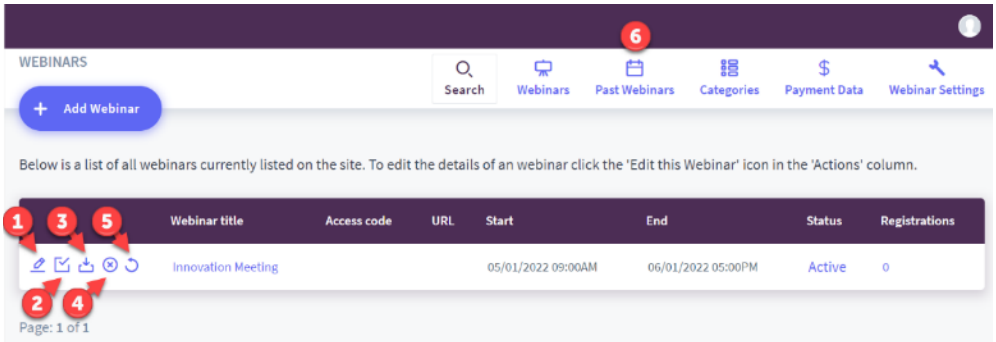




3. Complete fields in General Information. If the 'Show On Frontend' tick box is selected, the webinar will be displayed on the log-in screen.
4. Select if the user will receive an attendance certificate after watching the webinar
5. Assign webinar to the relevant category
6. Set Webinar Status. Active means the users can view and register for the webinar. Disabled means the user won't be able to view and register
7. Set the date and time for the webinar
8. Click 'Choose File' to upload the image that the user will see on their portal
9. Select the applicable fee option for the webinar
10. If the webinar has a fee, you can 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

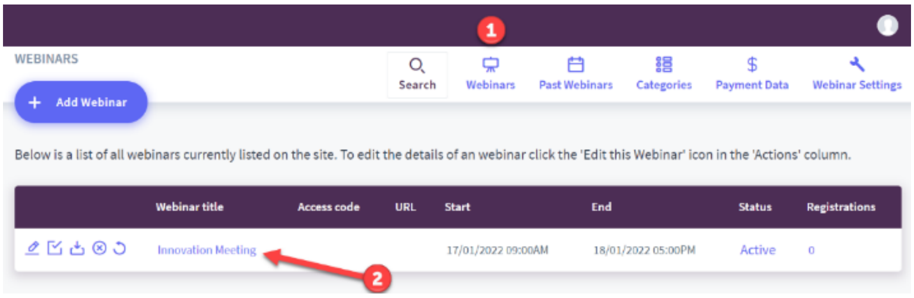
6.1.3 Webinar Action Buttons

1. This allows the Webinar Details to be edited. Also, there is an option to 'Tag This Webinar to a Skill', which awards attendees these skills after they watch the webinar
2. Mark Attendance can only be done once the Webinar date has passed using Past Webinars tab (6)
3. Download Attendee List 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)

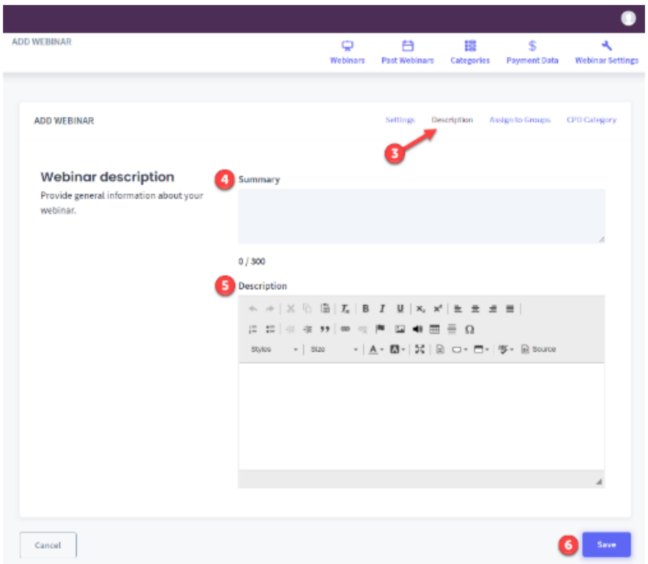


6.1.4 Webinar Description

1. Click the 'Webinars' tab
2. Click on the webinar title



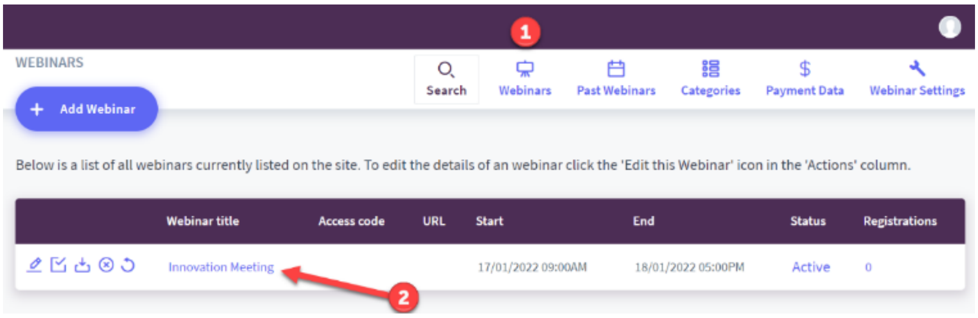
3. To add a description, click on the 'Description' link
4. Add a summary. This will display inside the webinar thumbnail on the learner portal
5. Add a description. This is what the learners see when they select the 'See More' option
6. Click 'Save' to save changes



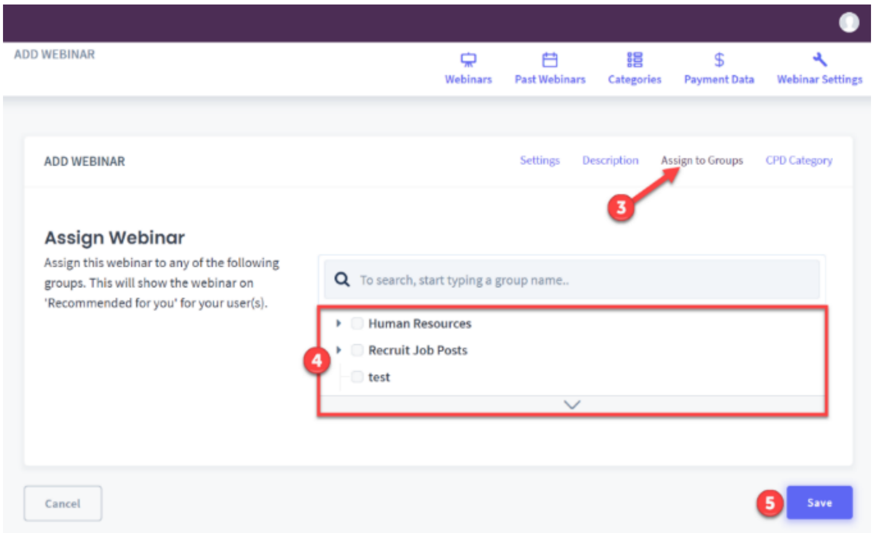
6.1.5 Assign Webinar to Groups

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

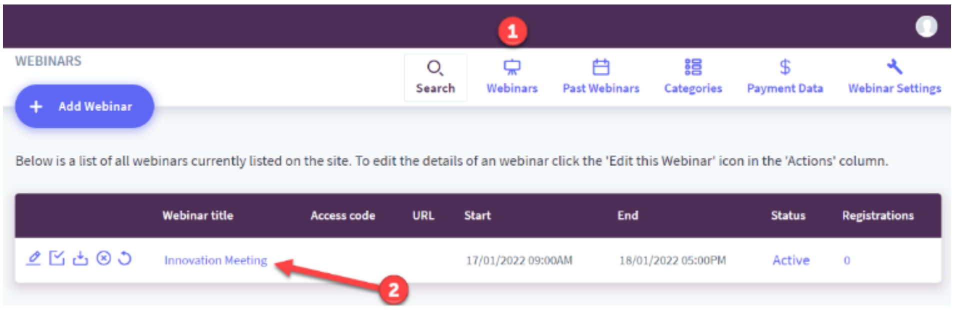


6.1.6 CPD Category

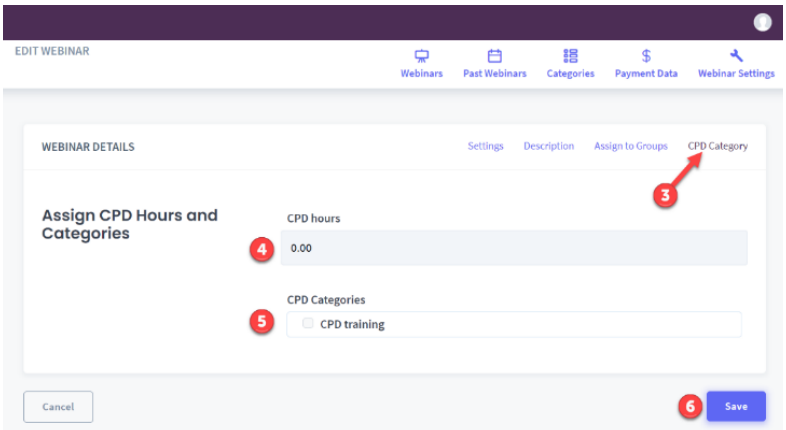
CPD Settings need to be enabled for the CPD Category link to appear. To activate this, navigate to the Settings module, and select 'CPD' from the platform dropdown.

To set the CPD 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



6.2 Event Manager

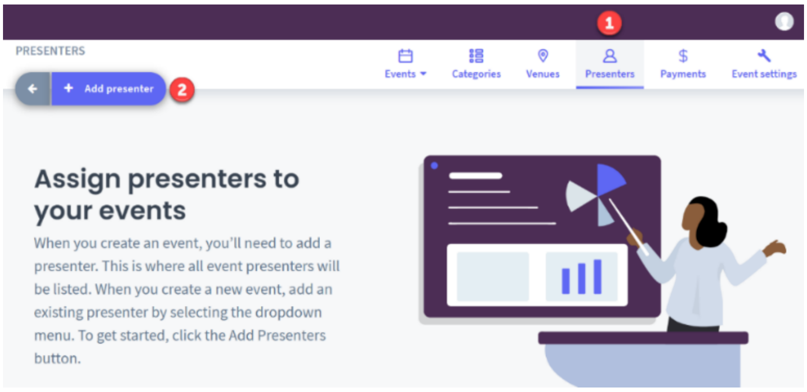
The Event Manager allows you to create and manage face-to-face training sessions, seminars, and instructor-led learning. See a snapshot of attendance and waitlists at any time with powerful reporting capabilities. Fill out all applicable fields, including cost, venue and presenter, and then assign the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

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

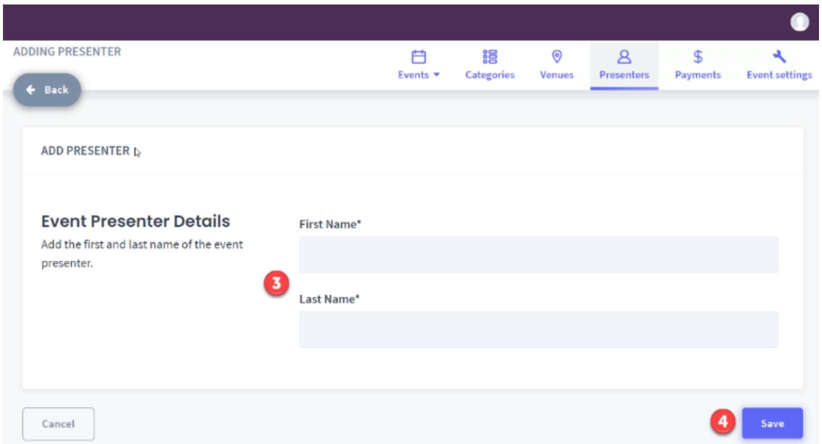
6.2.1 Presenters

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

1. Click the Presenters tab
2. Click 'Add Presenter'



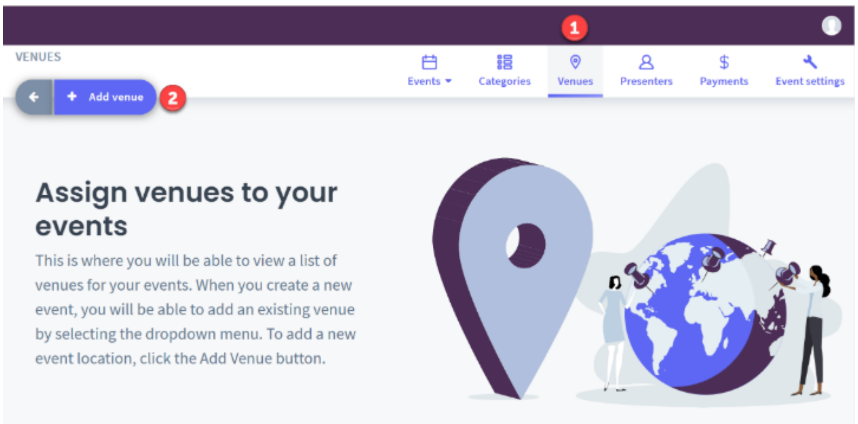
3. Fill in the first and last name of the presenter
4. Click 'Save' to save changes

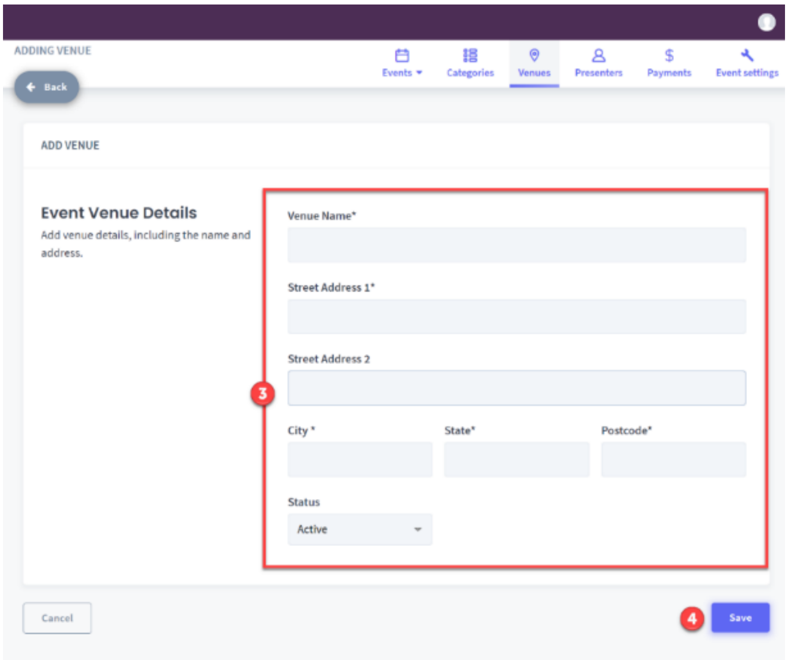


6.2.2 Venues

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

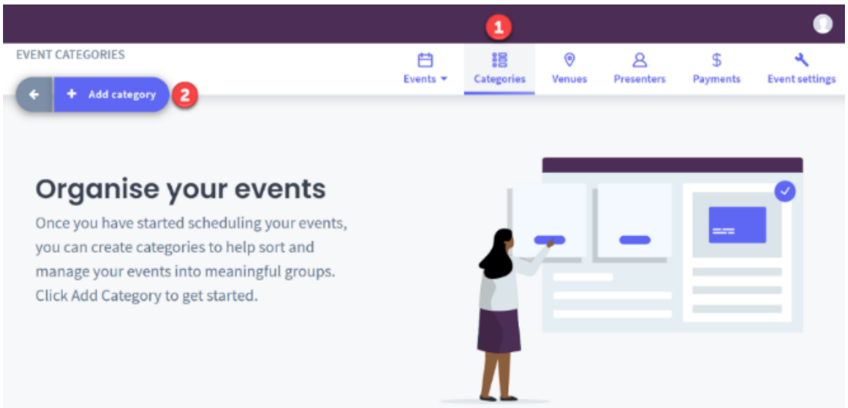




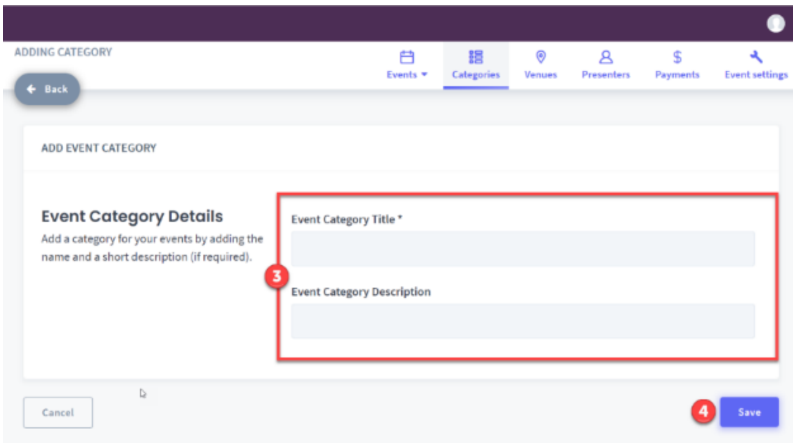
6.2.3 Categories

Categories help to sort and manage events into meaningful groups.

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

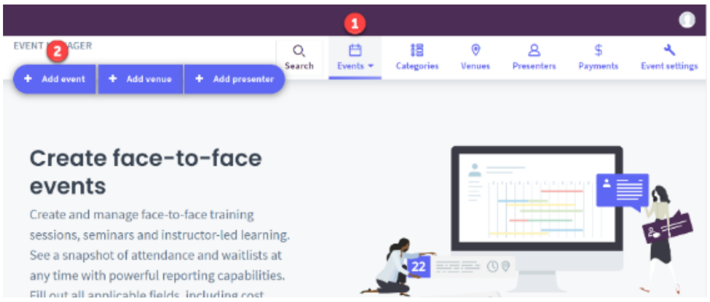


3. Add an event category title and event category description
4. Click 'Save' to save changes

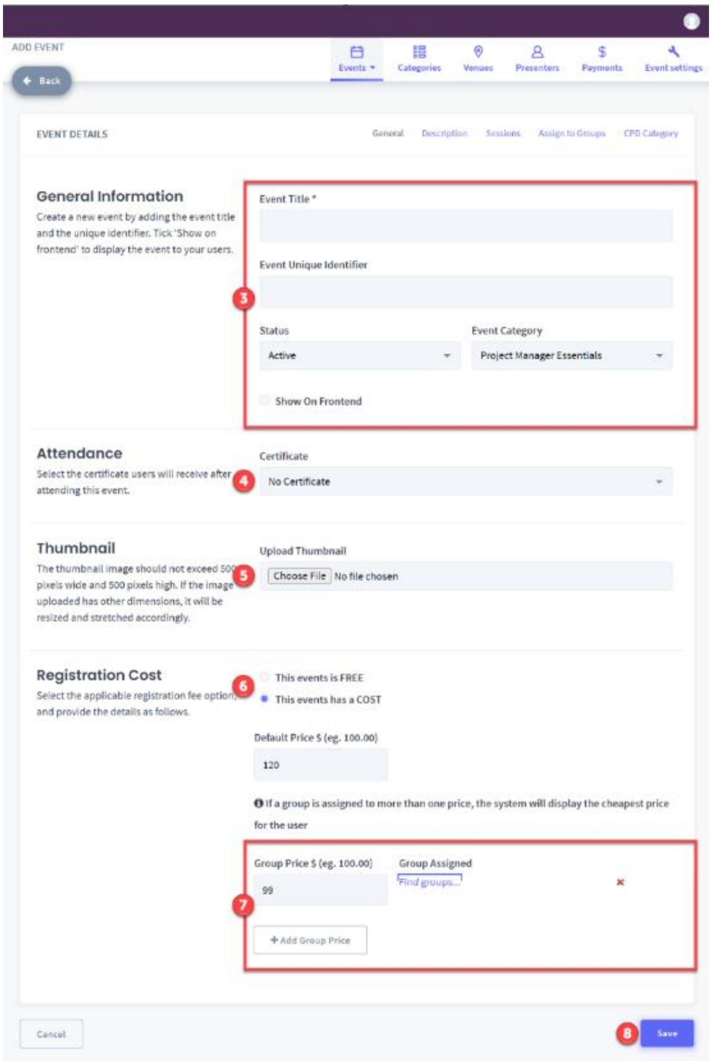


6.2.4 Adding an Event

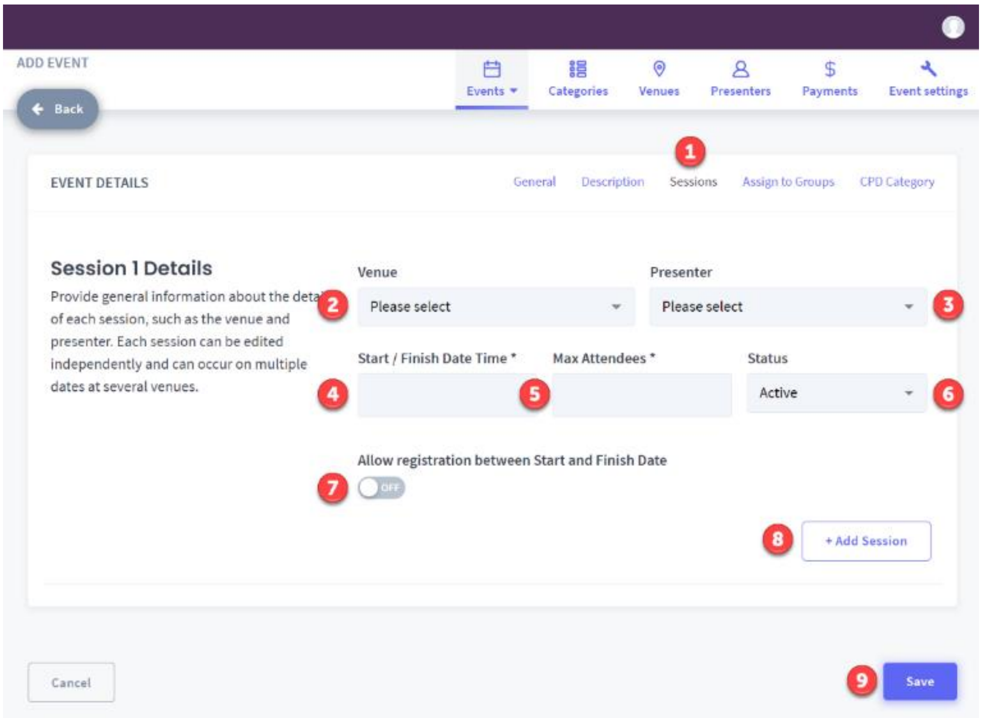
1. Click the ‘Events’ tab and click ‘Upcoming/active events’ from the drop down
2. Click ‘Add event’



3. Complete fields in the General Information section. If the ‘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 event
7. If the event has a fee, you can 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



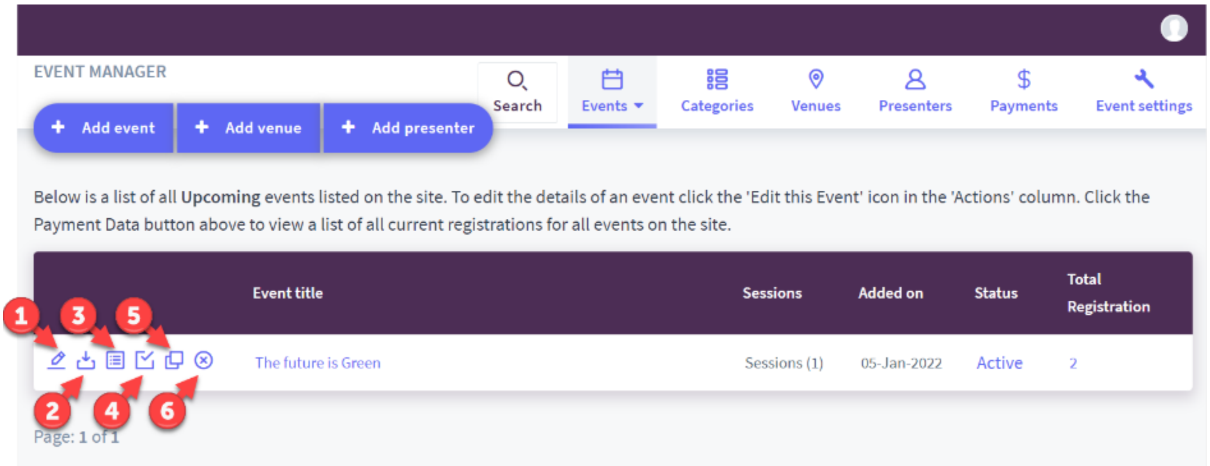
6.2.5 Event Session



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 the 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 the start and finish dates
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

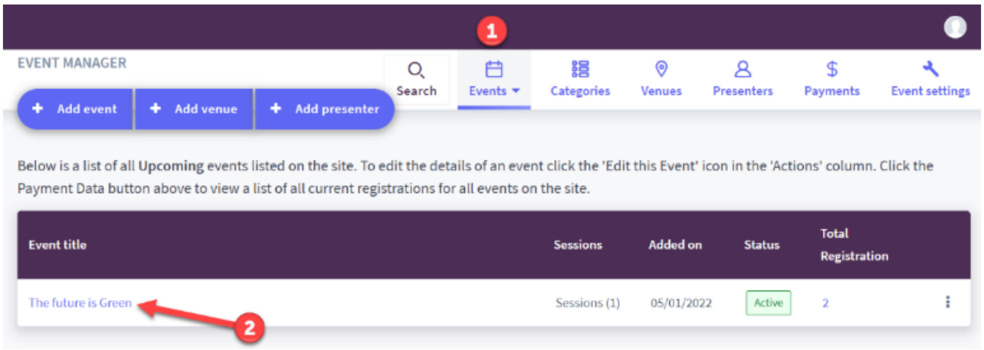
6.2.6 Event Action Buttons

1. This allows the Event Details to be edited. Also, there is an option to '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 can only be done once the event date has passed
5. Duplicate Event
6. Delete Event

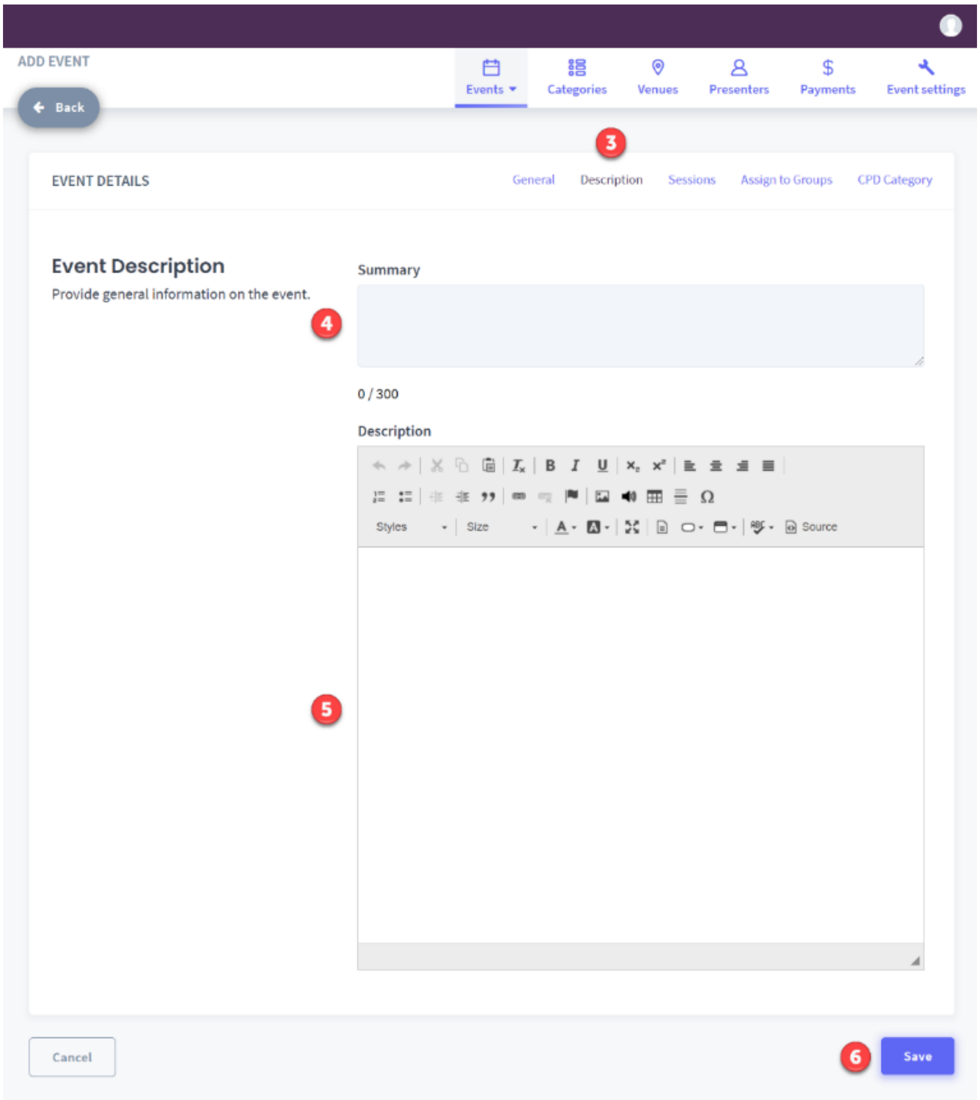


6.2.7 Event Description

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

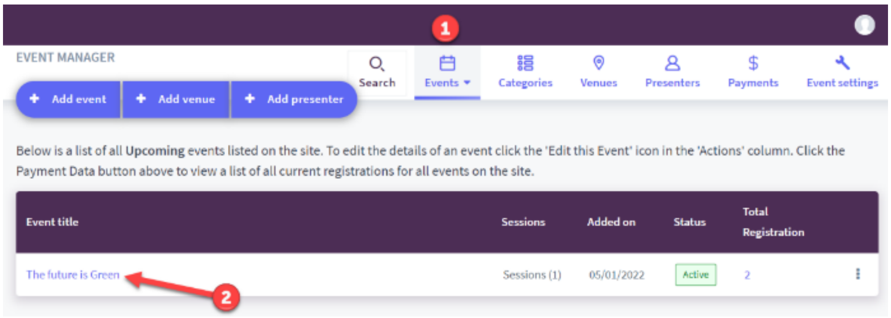


3. To add a description, click on the 'Description' link
4. Add a summary
5. Add a description
6. Click 'Save' to save changes

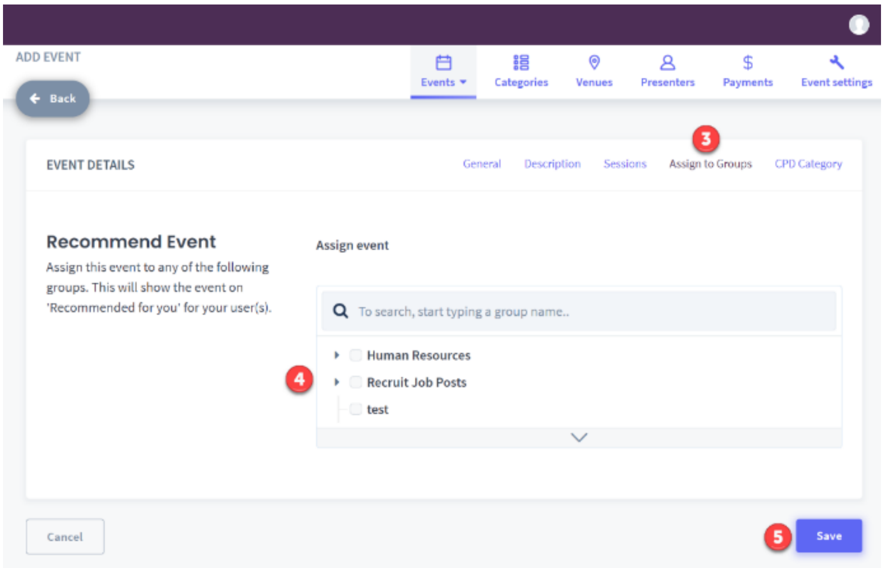


6.2.8 Assign the Event to Groups

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



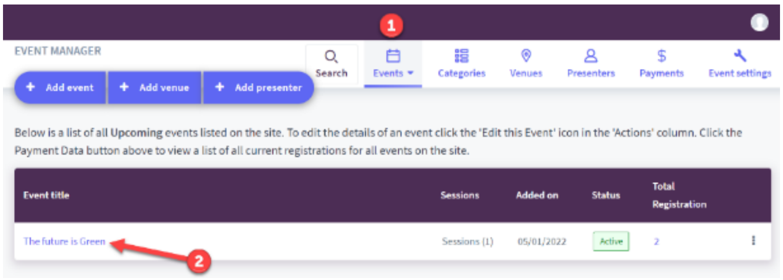
3. Click on the ‘assign to groups’ link
4. Select the relevant groups
5. Click ‘Save’



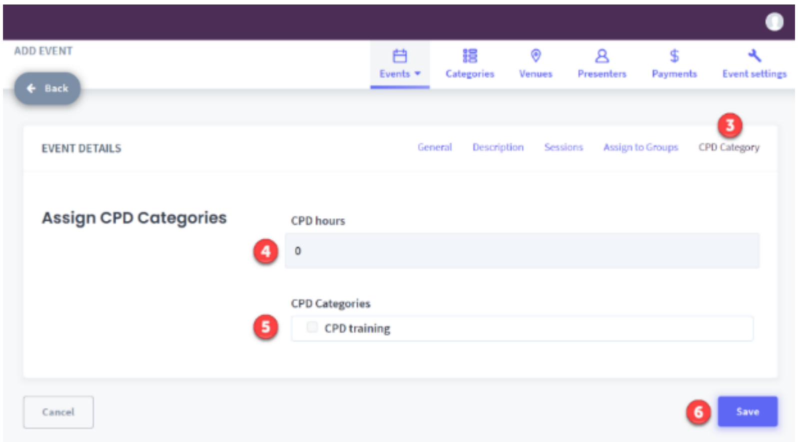
6.2.9 CPD Category

CPD Settings need to be enabled for the CPD Category link to appear. To activate this, navigate to the Settings 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



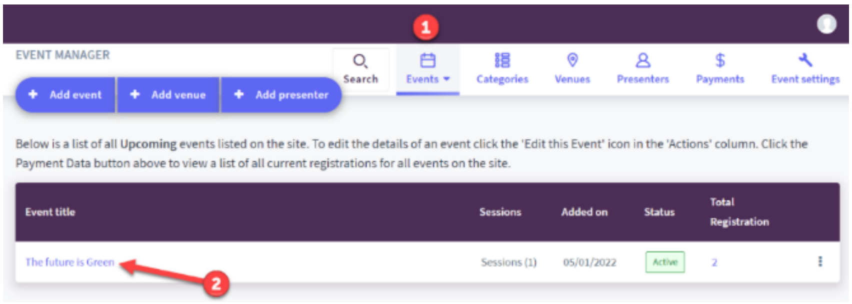
3. Click the ‘CPD Category’ link
4. Enter CPD hours
5. Select ‘CPD Category’
6. Click ‘Save’ to save changes



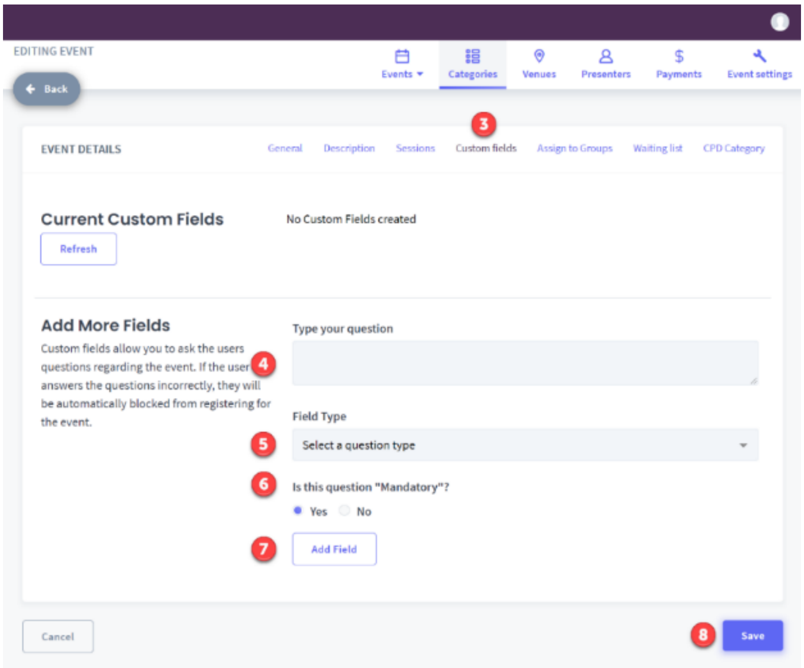
6.2.10 Custom Fields

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



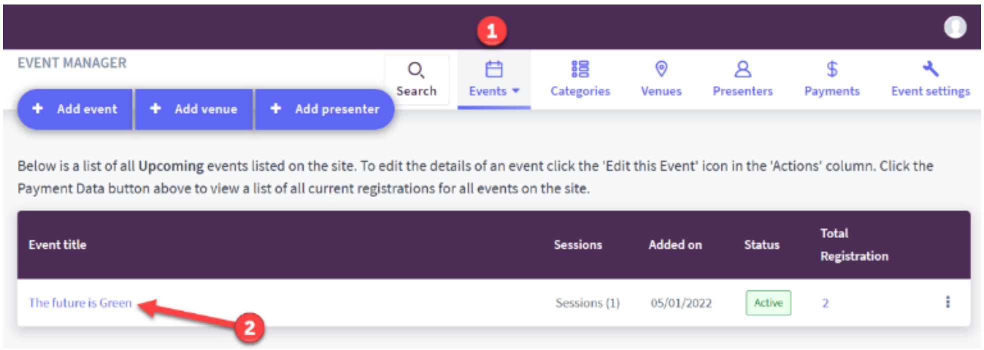
3. Click on the ‘Custom Fields’ link
4. Type your question
5. Select a question type
6. Select if the question is mandatory
7. Click ‘Add Field’ to add another question
8. Click ‘Save’ to save changes



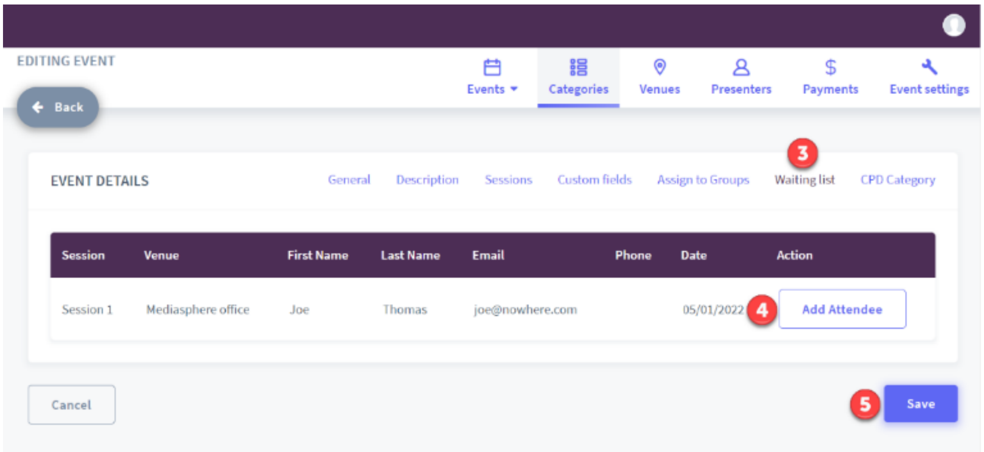
6.2.11 Waiting List

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 number of attendees has been reached. However, if you go back to the 'Sessions' tab and change the maximum number of 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

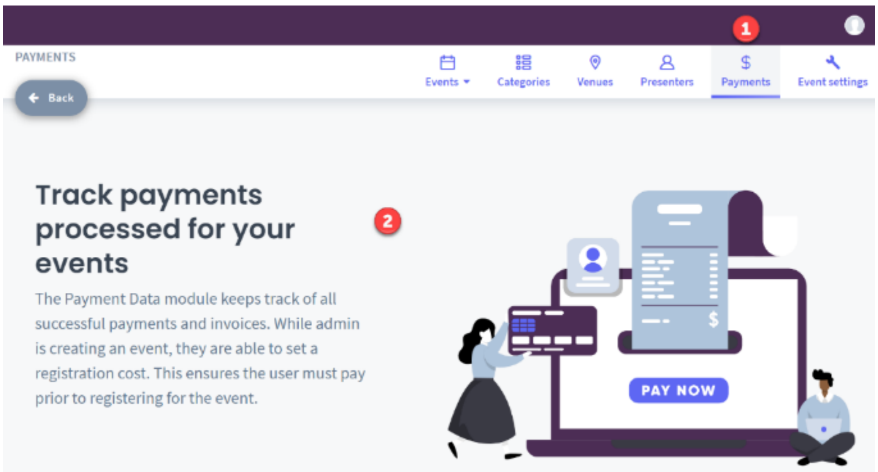


3. Click on the Waiting list link
4. Click 'Add attendee' to add them to the event
5. Click 'Save' to save changes



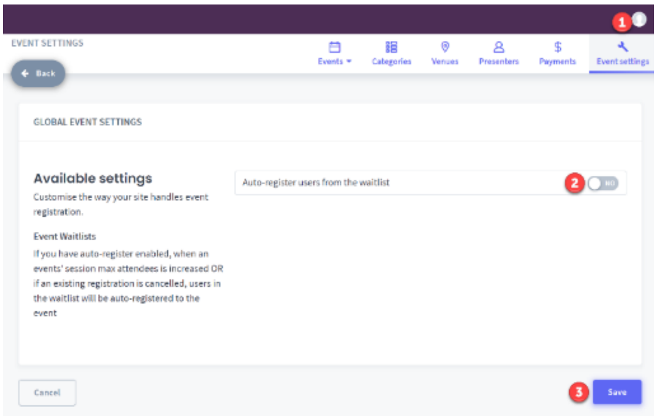
6.2.12 Event Payments

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



6.2.13 Event Settings

1. Click on the ‘Event settings’ tab
2. Toggle ON to enable auto-register from the waitlist. This will come into effect when an events' session max attendees are 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

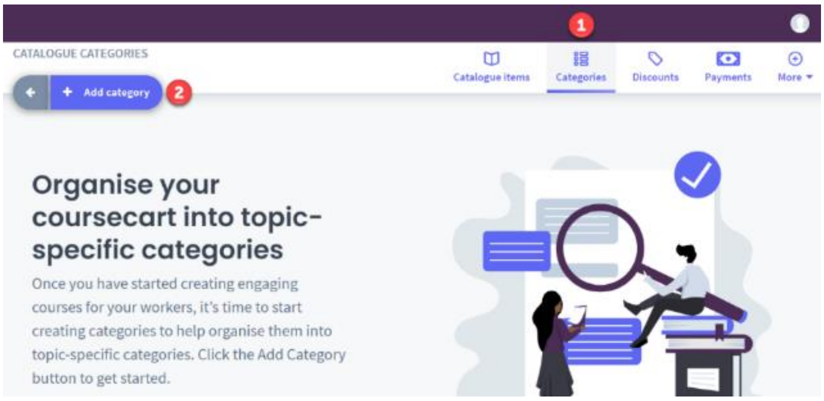


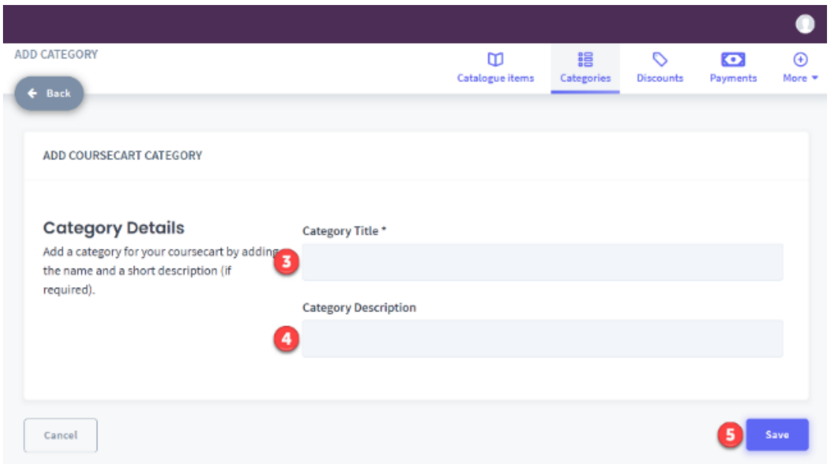
6.3 Course Catalogue

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

6.3.1 Adding a Course Category

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

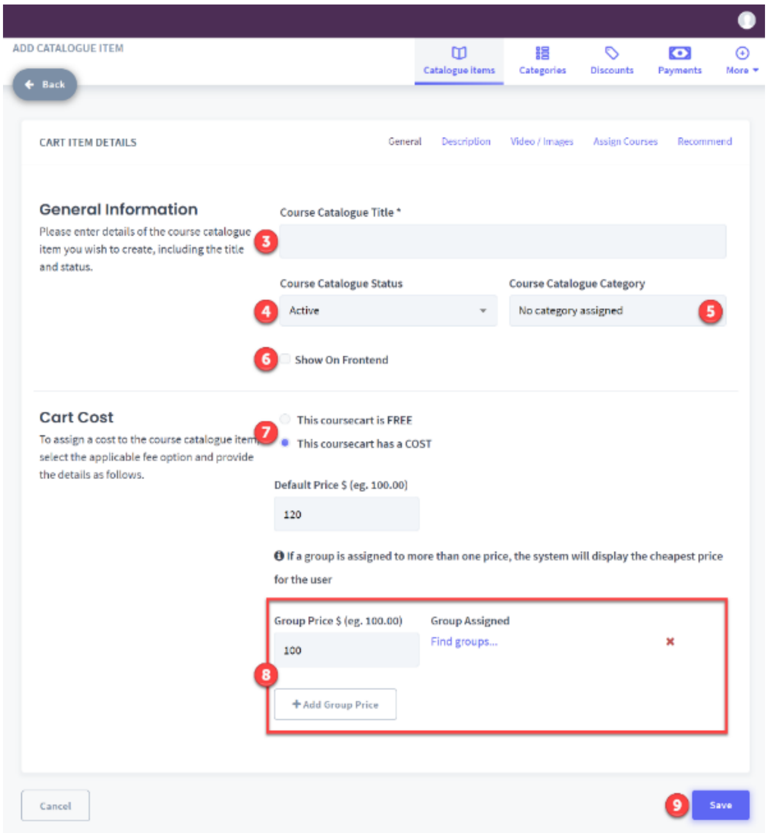




3. Add Category Title
4. Add Category Description
5. Click ‘Save’ to save changes

6.3.2 Add Course Catalogue Item

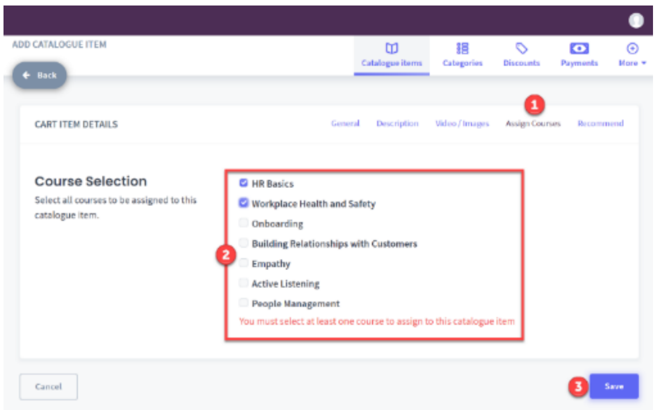
1. Click ‘Catalogue items’
2. Click ‘Add item’



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 Frontend’
7. Select if the course is free or has a cost
8. If the course has a fee, you can 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

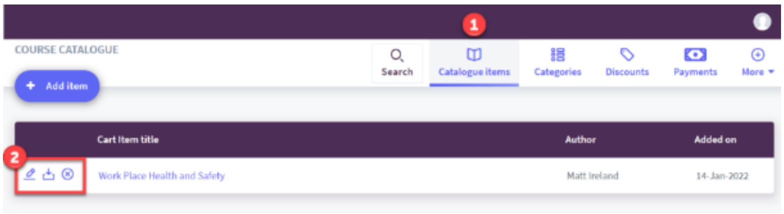
6.3.3 Assign Courses

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



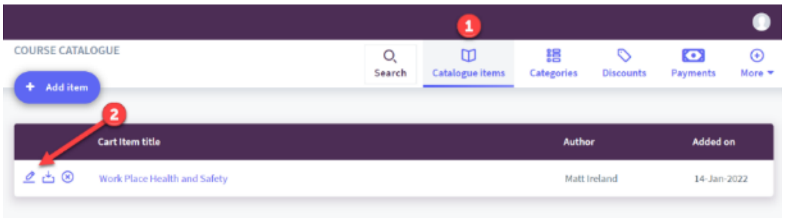
6.3.4 Course Catalogue Action Buttons

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

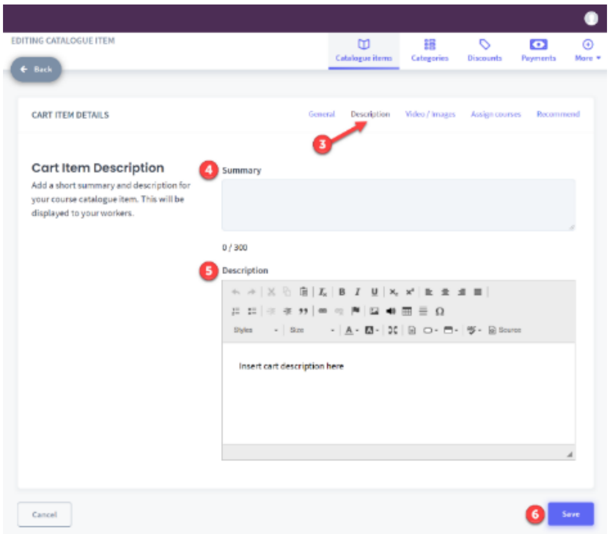


6.3.5 Catalogue Description

1. Click on the 'Catalogue items' tab
2. Click the 'Edit' button

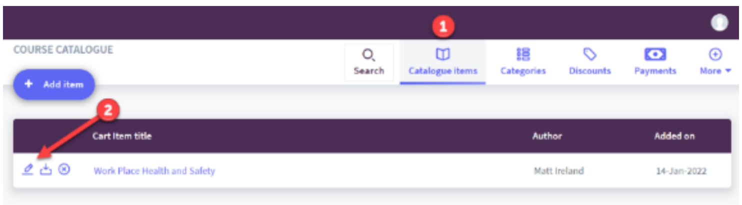


3. Click on the 'Description' link
4. Add a summary
5. Add a description
6. Click 'Save' to save changes

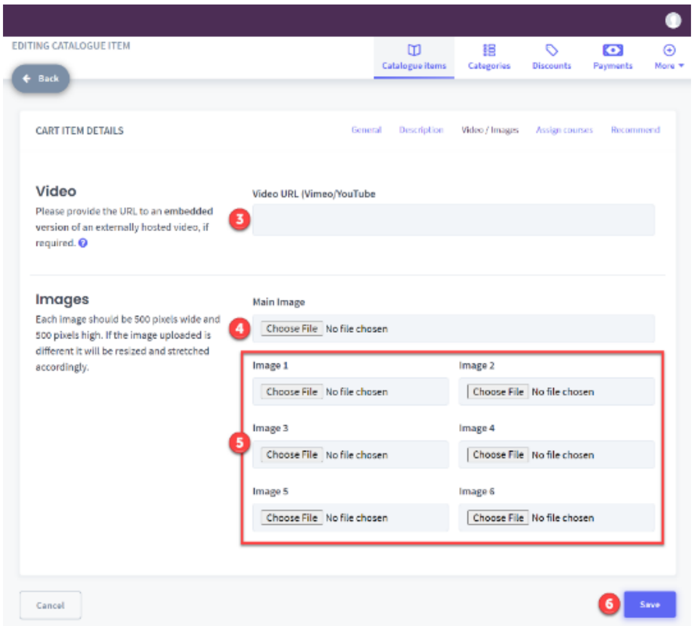


6.3.6 Adding Videos and Images

1. Click on the 'Catalogue items' tab
2. Click the 'Edit' button

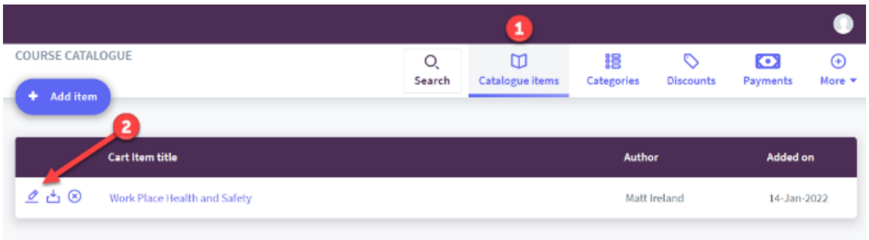


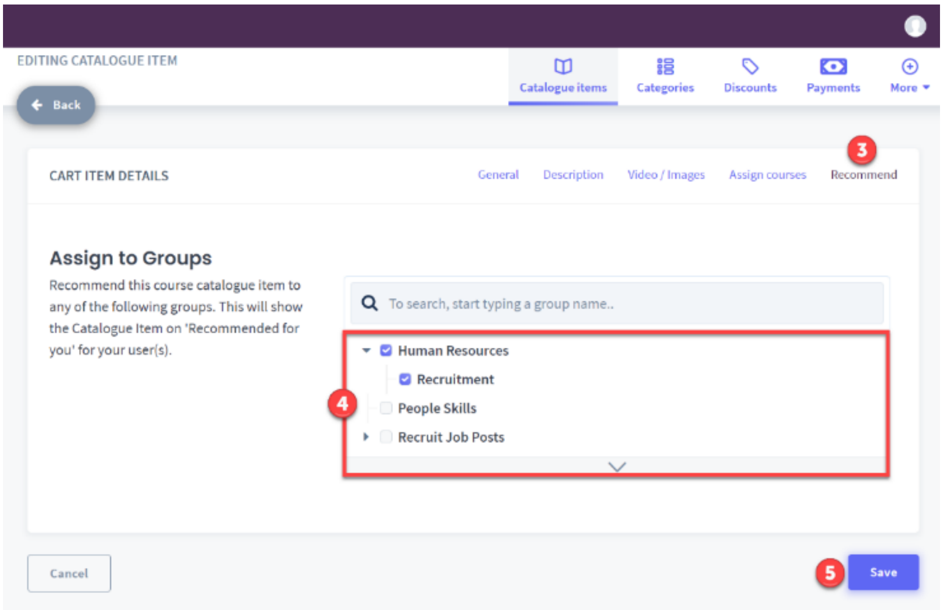
3. Option to enter the URL to an embedded video (YouTube, Vimeo etc.). The learner will see the video when clicking the 'View Details' button (of the course) in their portal
4. Click 'Choose File' to upload the main image for the course. The learner will see this image when they click 'Buy Courses' in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



6.3.7 Recommend (Assign Course to a Group)

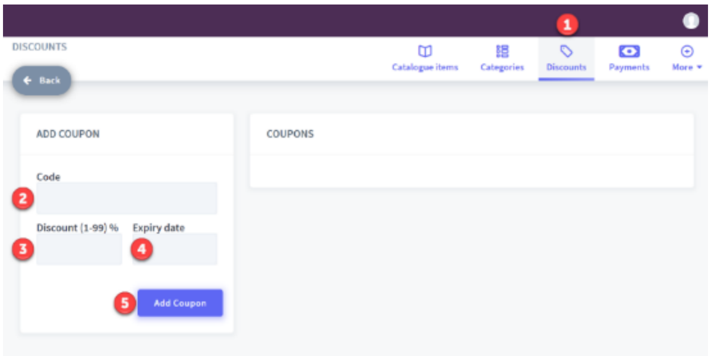
1. Click on the 'Catalogue items' tab
2. Click the 'Edit' button
3. Click the 'Recommend' link
4. Assign cart item to a group(s)
5. Click 'Save' to save changes





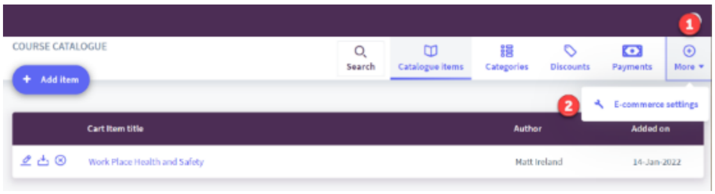
6.3.8 Adding a Discount Coupon

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



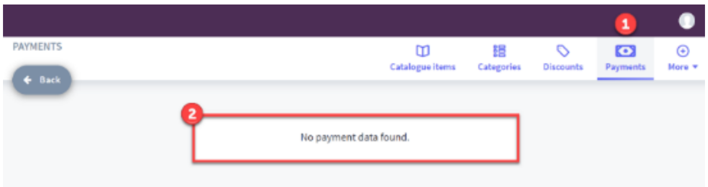
6.3.9 View Payment Data

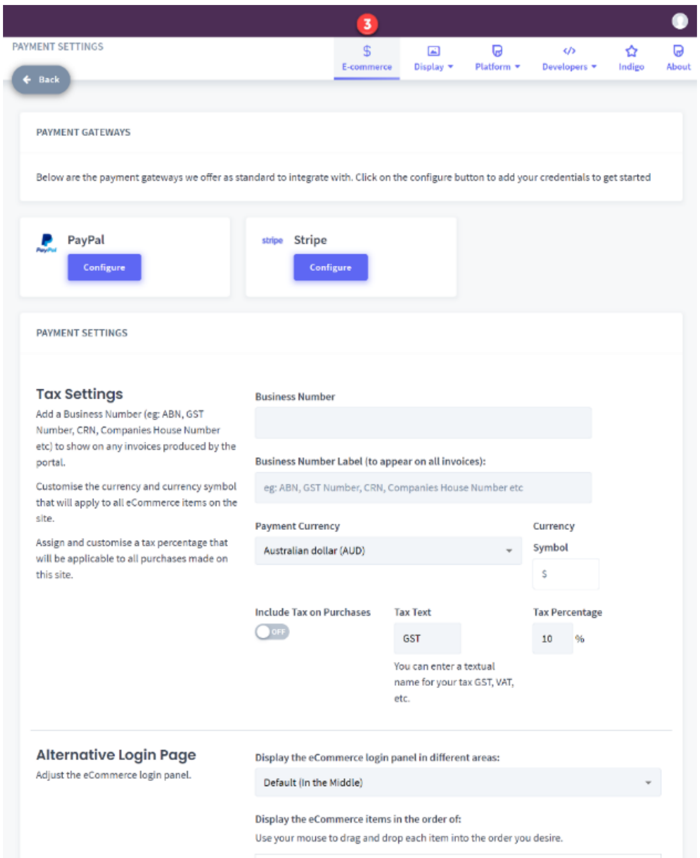
1. Click on the 'Payments' tab
2. When a course has been purchased it will show here



6.3.10 More – E-commerce Settings

1. Click on the 'More' tab
2. Click 'E-commerce settings' from the drop-down
3. You will be taken to the Payment Settings



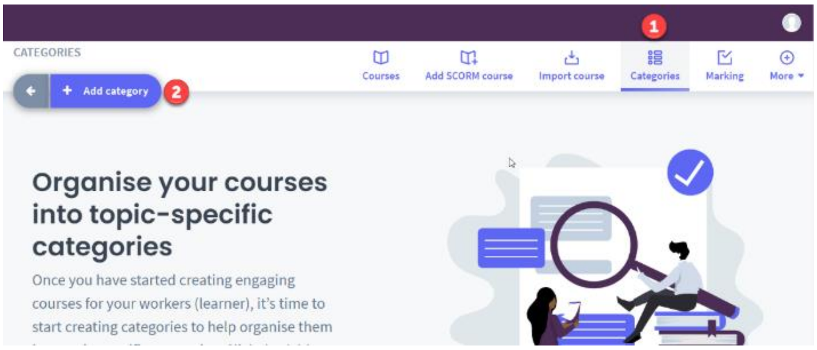


6.4 Content Publisher

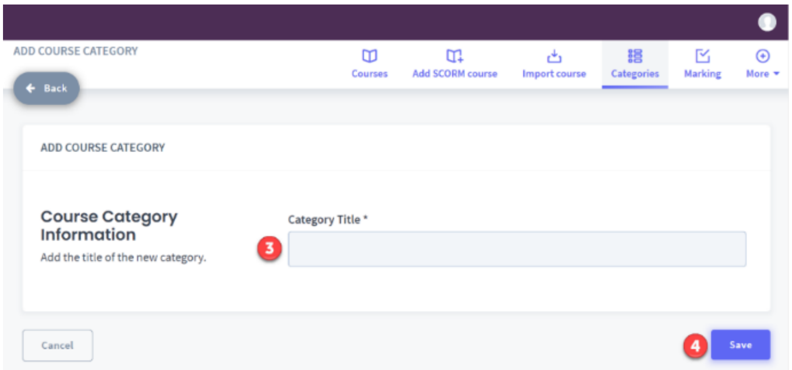
Enhance the skills of your workers by adding or importing courses to your online training platform.

6.4.1 Categories

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

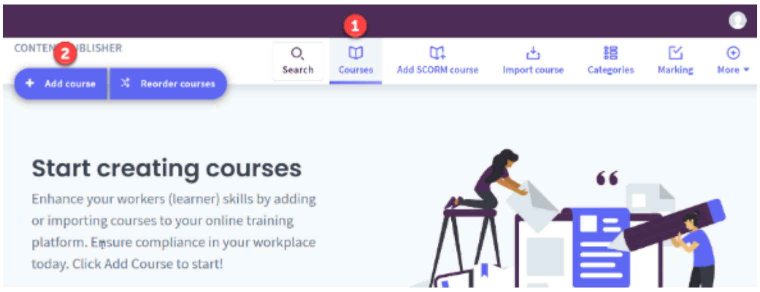


3. Add a category title
4. Click ‘Save’ to Save changes

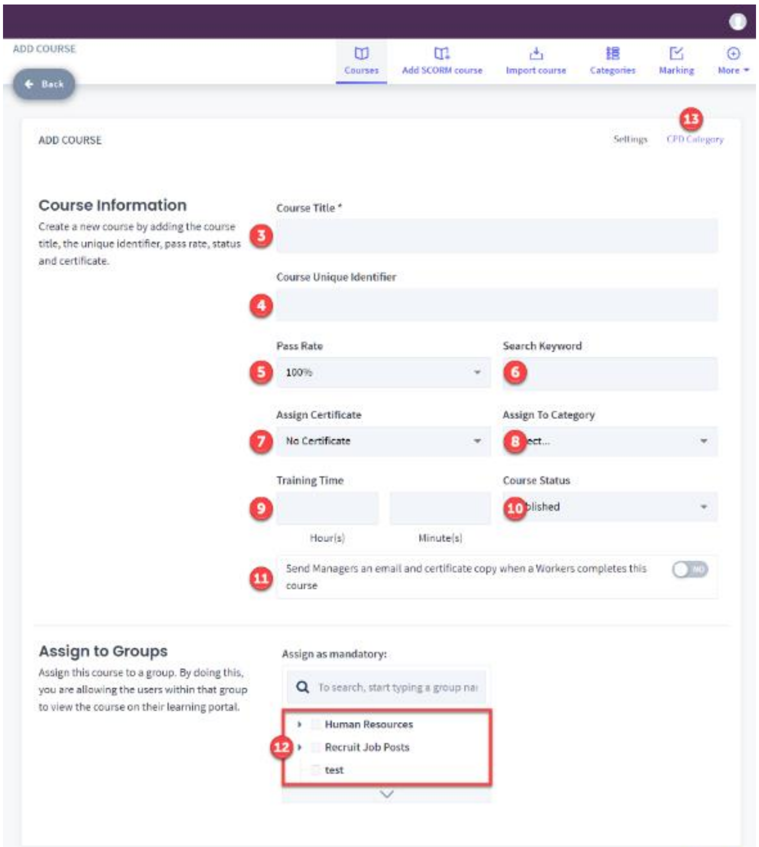


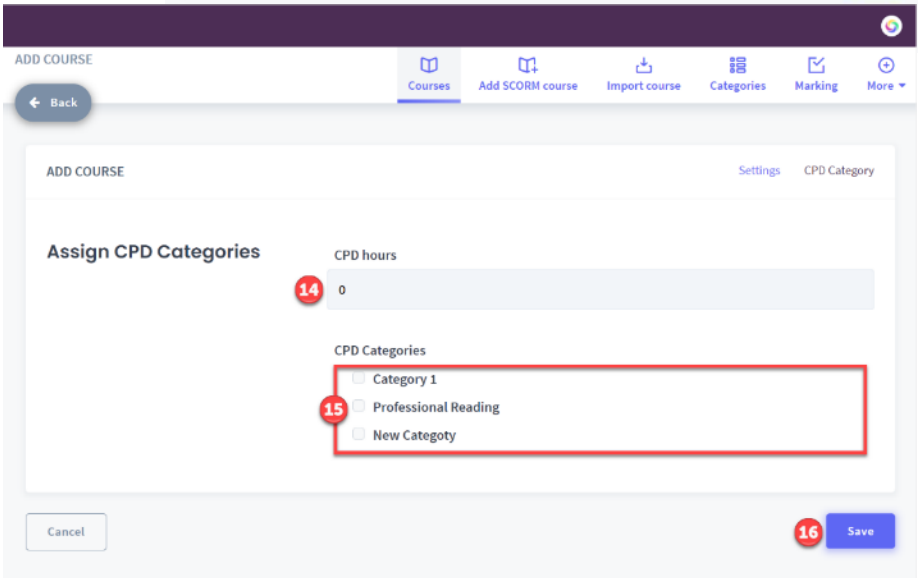
6.4.2 Adding a Course

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



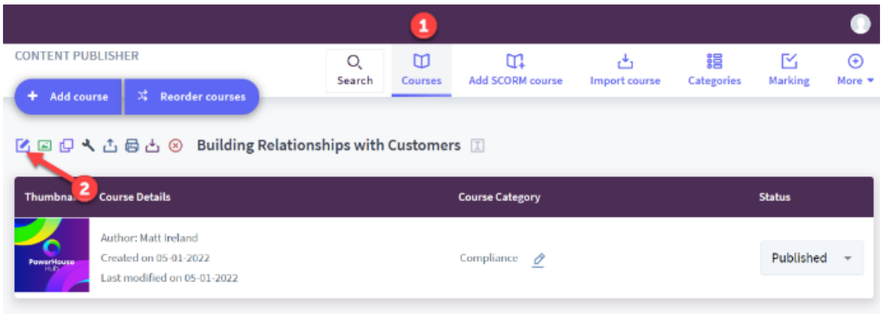
3. Add a course title
4. Add a course unique identifier if needed
5. Set the pass rate for the course
6. Add a search keyword to help learners find the course easily
7. Assign a certificate
8. Assign to a category
9. Enter the training time needed to take the course
10. Set Course Status. Published: 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 the manager a copy of the course certificate once the learner has completed the course
12. Select the group(s) that you want to assign the course to appear on the learner portal
13. When all Settings have been filled out, click 'CPD Category' link
14. Enter the CPD hours
15. Select the CPD Category
16. Click 'Save' to save changes



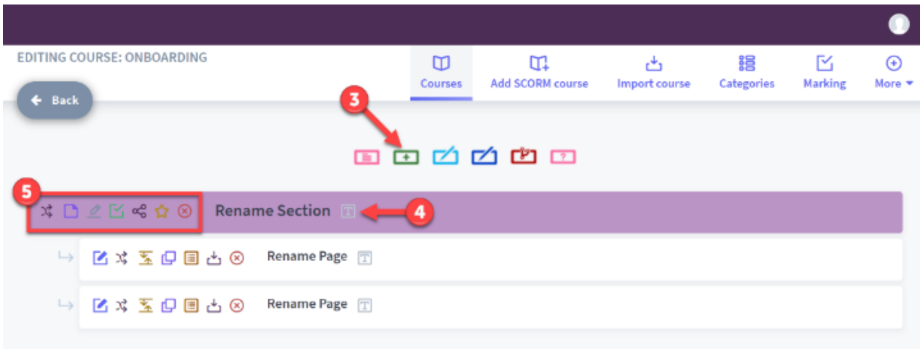


6.4.3 Building the Course Skeleton

1. Click on the ‘Courses’ tab
2. Click ‘Edit course’

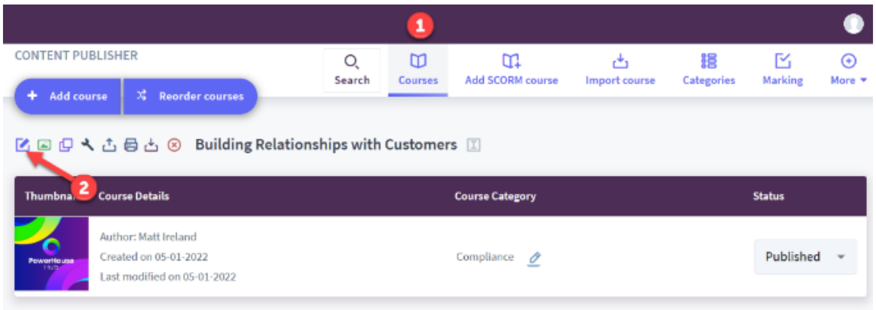


3. Click ‘Add section’ to add multiple sections
4. Click to edit the section name, enter the section name, and then click the ‘save’ icon
5. Use section icons to build the course section as required. Section icons include:
    - Re-arrange Items
    - Add Section Page
    - Add Section Practice Test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

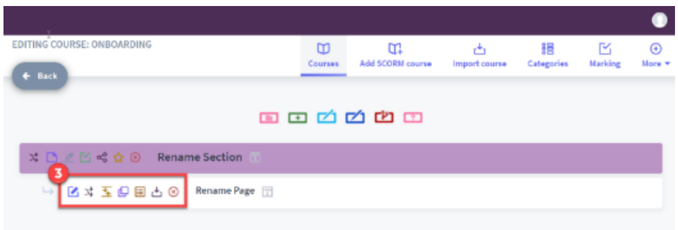


6.4.4 Course Actions Items

1. Click on the ‘Courses’ tab
2. Click ‘Edit course’

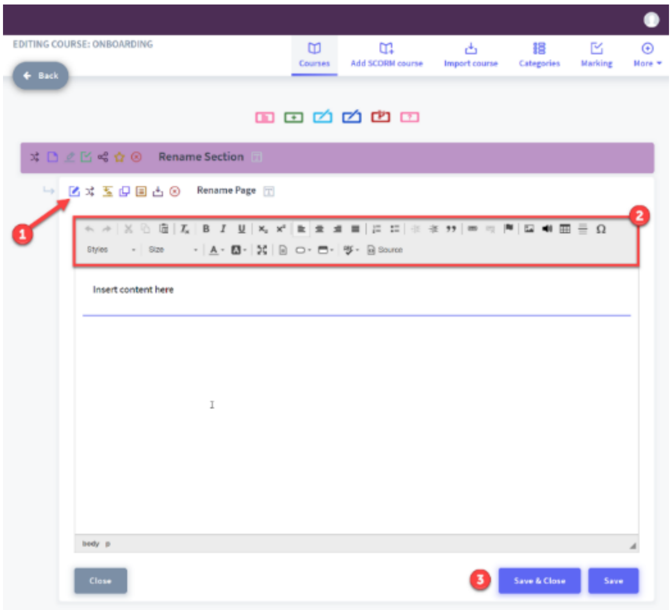


3. Use page icons to view your course. Page icons include:
    - Edit this page – insert templates and creative assets through the CK Editor
    - Re-arrange items – re-order pages in the section
    - Move this page – move the page into another section
    - Duplicate this page – copy the page
    - Preview this page – view the course from the backend
    - Import SCORM to this page – you must have SCORM files to use this option
    - Delete this page



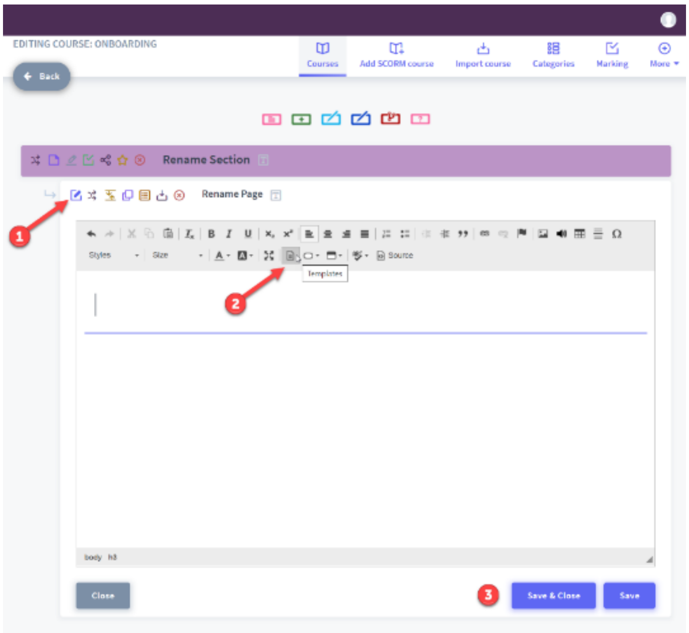
6.4.5 Creating Course Pages Using the CK Editor

1. Click the ‘Edit this page’ icon
2. Create pages similar to how you would in a Word Document using the CK Editor options
3. Click ‘Save’ to save changes or ‘Save and Close’ when finished



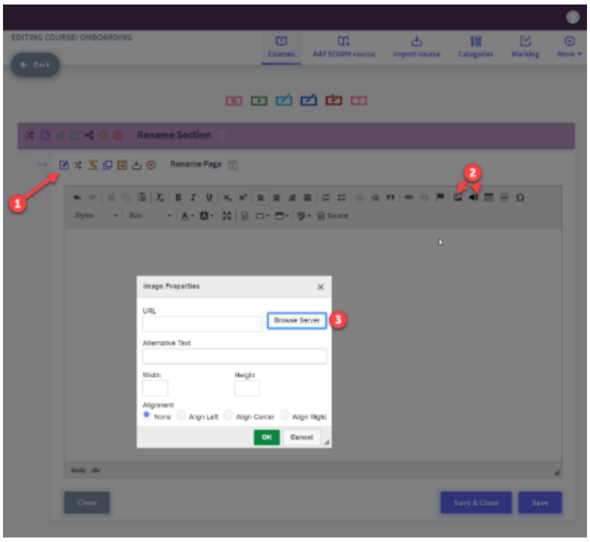
6.4.6 Creating Course Pages from a Template

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

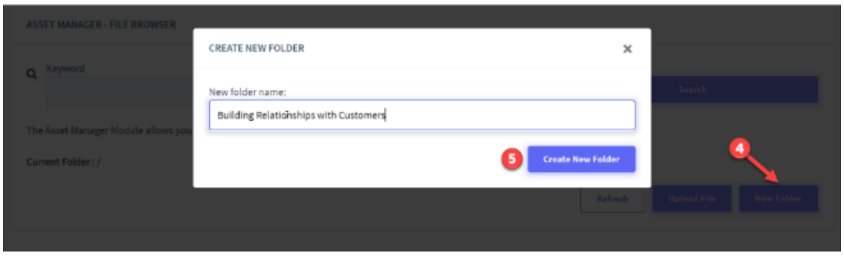


6.4.7 Uploading Images and Audio Files

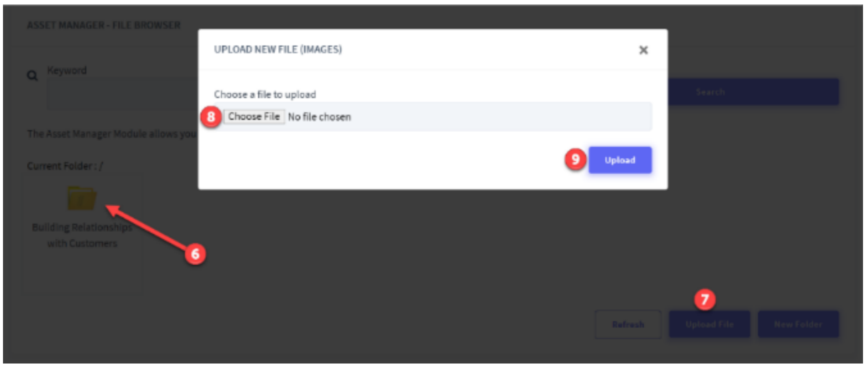
1. Click the ‘Edit this page’ icon
2. Click the image or audio button (depending on which option you need)
3. Click ‘Browse Server’



4. Click ‘New Folder’ – it’s best practice for each course to have its own media folder
5. Name the folder and click ‘Create New Folder’

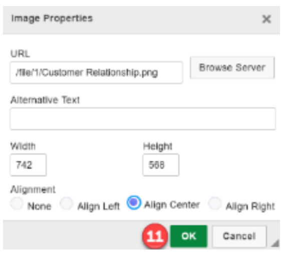


6. Click the new folder
7. Click ‘Upload File’
8. Click ‘Choose File’ and select the relevant file from your hard drive
9. Click ‘Upload’



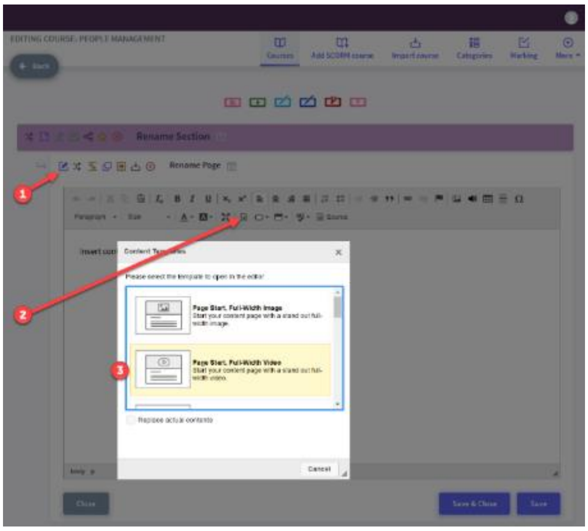
10. Hover over file and click ‘Insert’

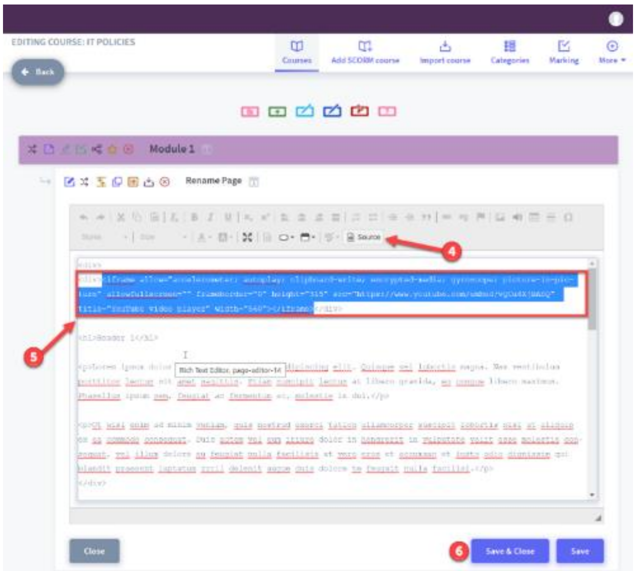
11. Select centre align (optional) and click ‘OK’



6.4.8 Adding a Video

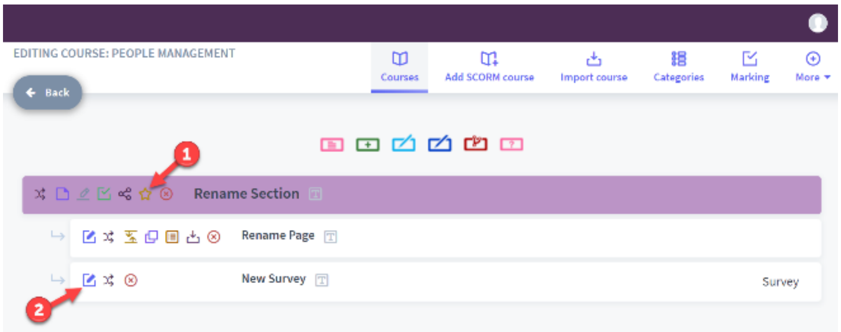
1. Click the 'Edit this page' icon
2. Click the 'Templates' icon
3. Click 'Page start, full-width video'
4. Click 'Source'
5. Replace code between <div> and </div> tags with the embed code for the video that you would like to use (as highlighted in the image)
6. Click 'Save & Close'



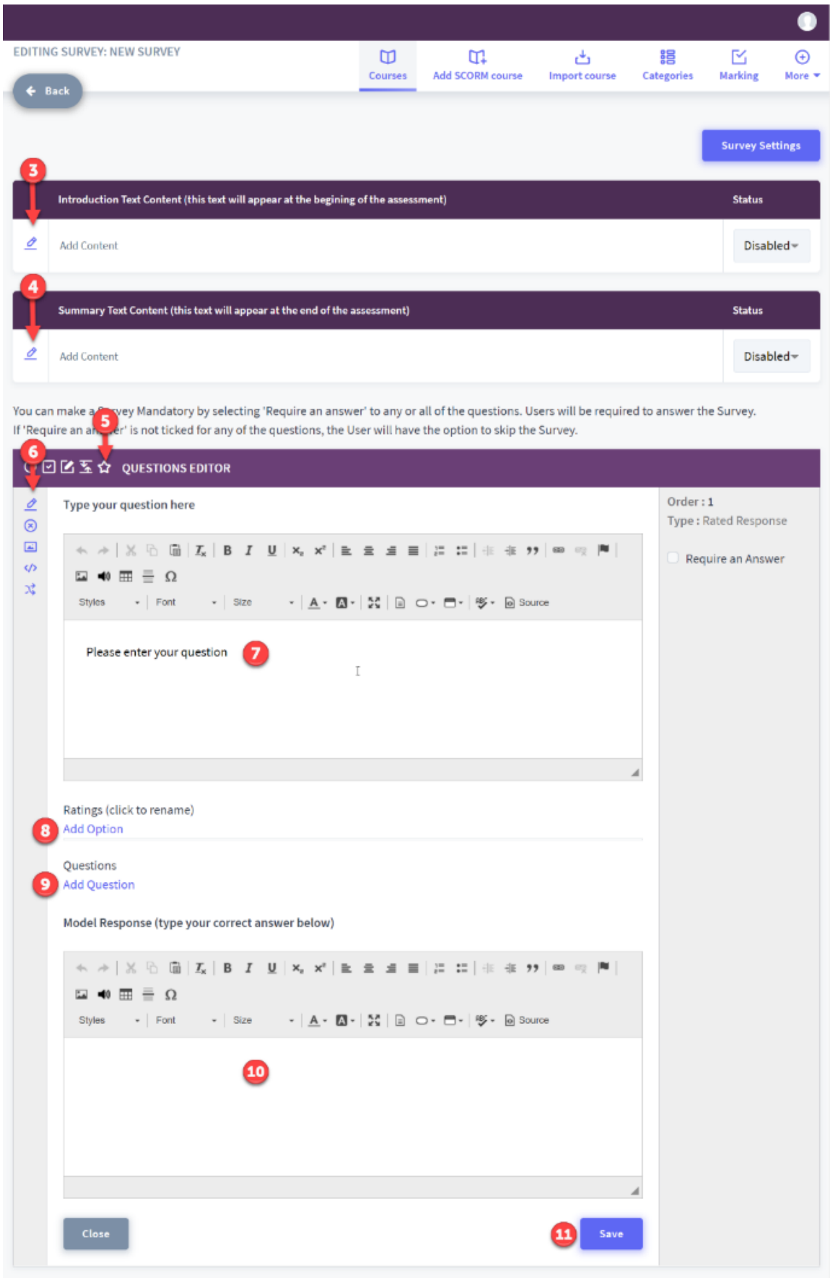


6.4.9 Adding Rated Response Question

1. Click 'Add Section Survey' from the relevant section
2. Click 'Edit this Assessment'

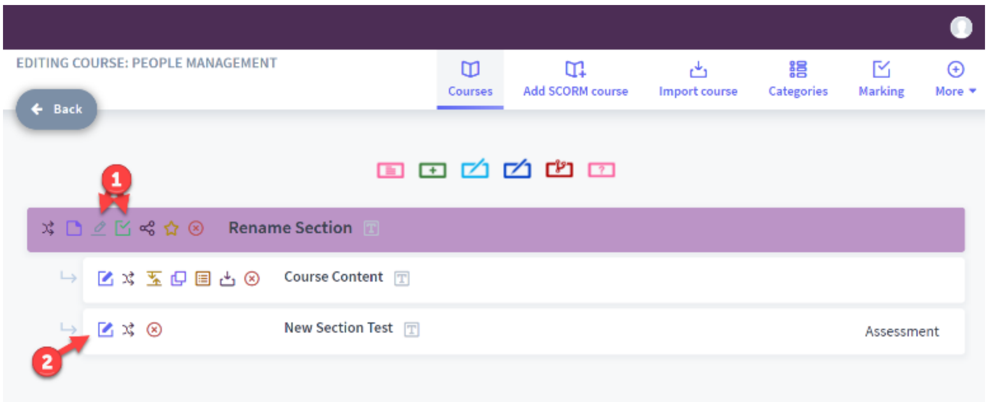


3. Click the 'Edit' icon if you would like to add introduction text at the beginning of the assessment
4. Click the 'Edit' icon if you would like to add summary text at the end of the assessment
5. Select 'Add Rated Response Question'
6. Click 'Edit Question' to add content to the question
7. Enter your question or statement in the box
8. Click 'Add Option' to add as many ratings as you need. For example, these can range from 1 to 5 or from Strongly Agree to Strongly Disagree
9. Click 'Add Option' to add as many questions or statements as you need. Everything entered here will be rated by the options created above
10. Click in the Model Response Box to add additional information about the question
11. Click 'Save' to save changes

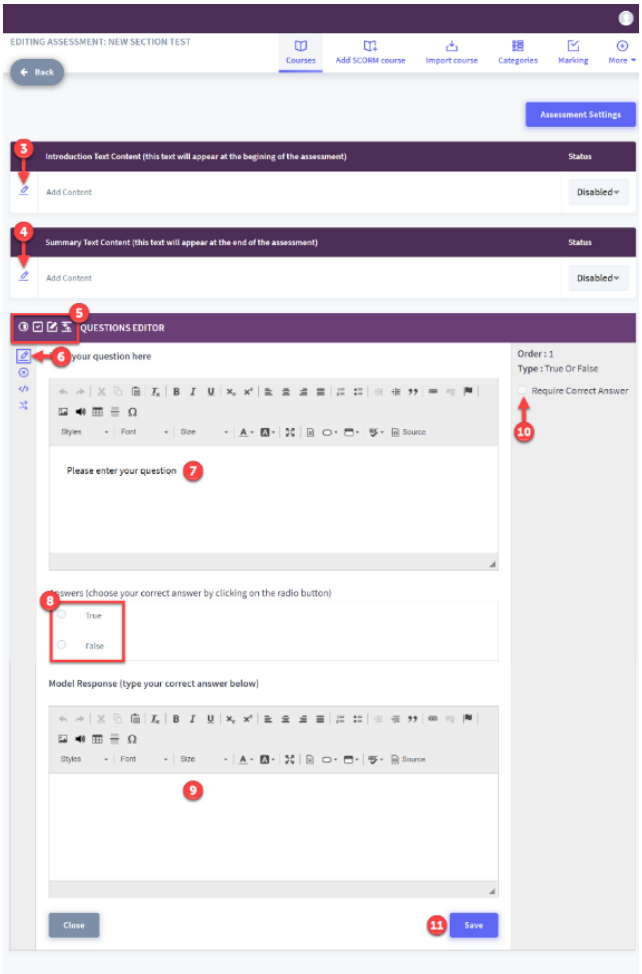


6.4.10 Adding a Test or Practice Test

1. Click to add a practice test or a test
2. Click the 'Edit' icon



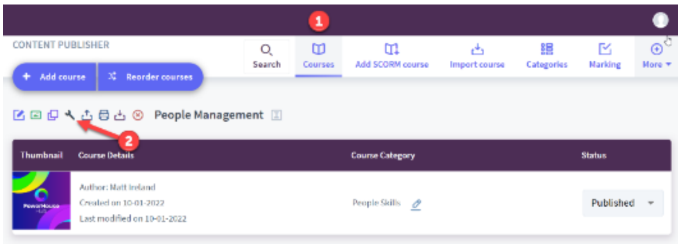
3. Click the ‘Edit’ icon if you would like to add introduction text at the beginning of the assessment
4. Click the ‘Edit’ icon if you would like to add summary text at the end of the assessment
5. Select from True or False, Multiple Choice, Short Answer or Re-order Question from the question editor
6. Click ‘Edit Question’ to add content to the question
7. Enter your question or statement in the box
8. Choose your correct answer by clicking the radio button
9. Click to type your correct answer. This will be shown after the test has been submitted
10. Click the radio button if you require the learner to achieve the correct answer
11. Return to step 5 to add multiple questions and when finished click ‘Save’ to save changes

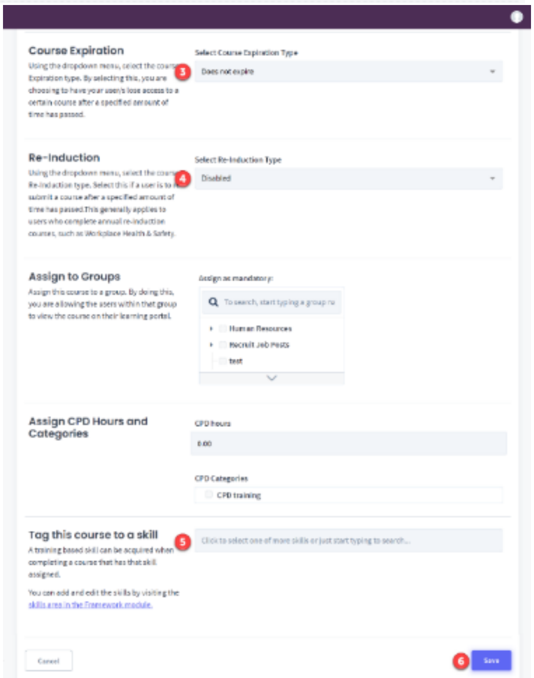


6.4.11 Course Settings

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

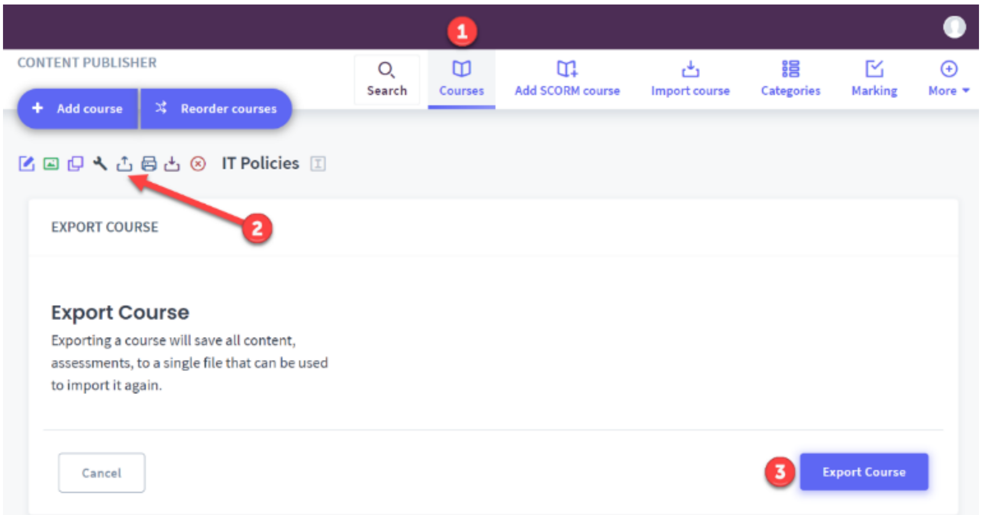
1. Click the ‘Courses’ tab
2. Click ‘Course settings’ icon
3. Using the drop-down menu, select the course Expiration type. By selecting this, your users will lose access to the course after a specified amount of time has passed.
4. Using the drop-down menu, select the course Re-Induction type. Select 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





6.4.12 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

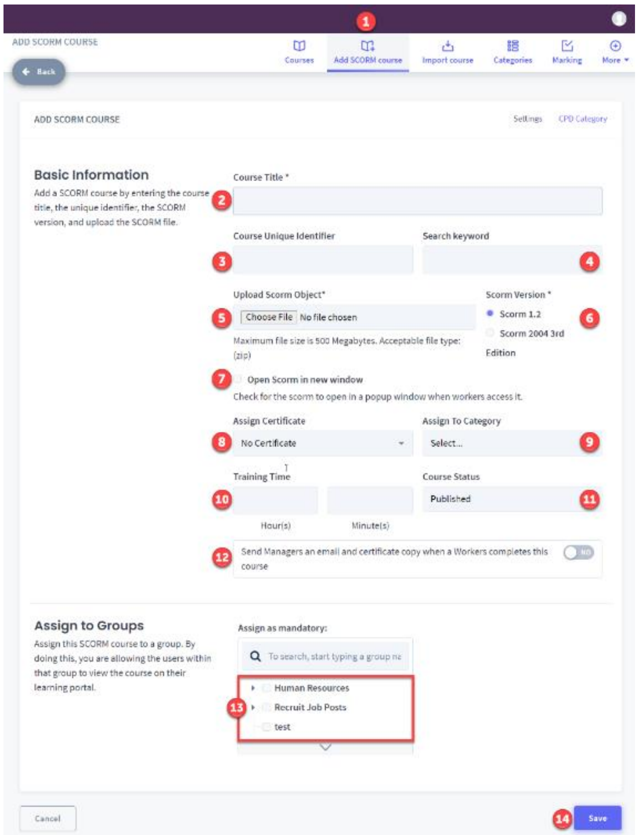


6.4.13 Add SCORM Course

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

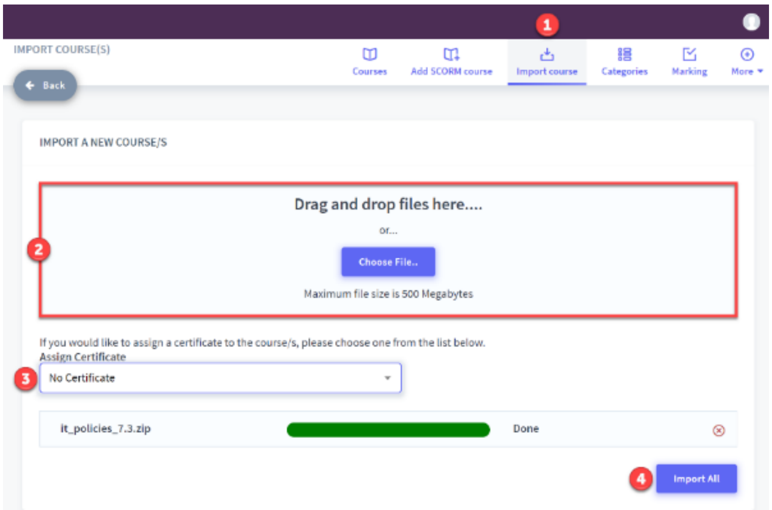
To populate a SCORM course 'by itself' with no other course pages required, steps are as follows:

1. Click 'Add SORM course' tab
2. Add a course title
3. Add a course unique identifier if needed
4. Add a search keyword to help learners find the course
5. Click 'Choose File' to upload a SCORM file
6. Select the SCORM version
7. Select tick box for 'SCORM to open in a pop-up window' when workers access it
8. Assign a certificate
9. Assign to a category
10. Enter the training time needed to take the course
11. Set Course Status. Published: Learner will be able to take the course. Draft: Learners won't be able to see the course in the portal
12. Toggle Yes to email 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



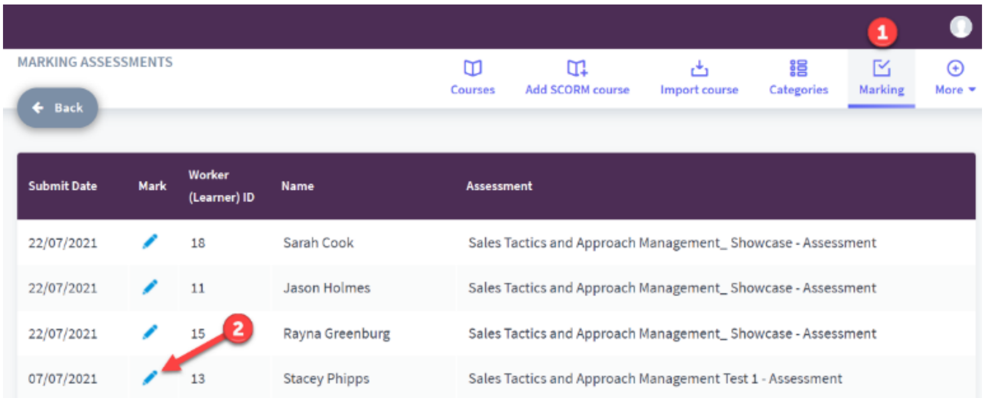
6.4.14 Import Course

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’

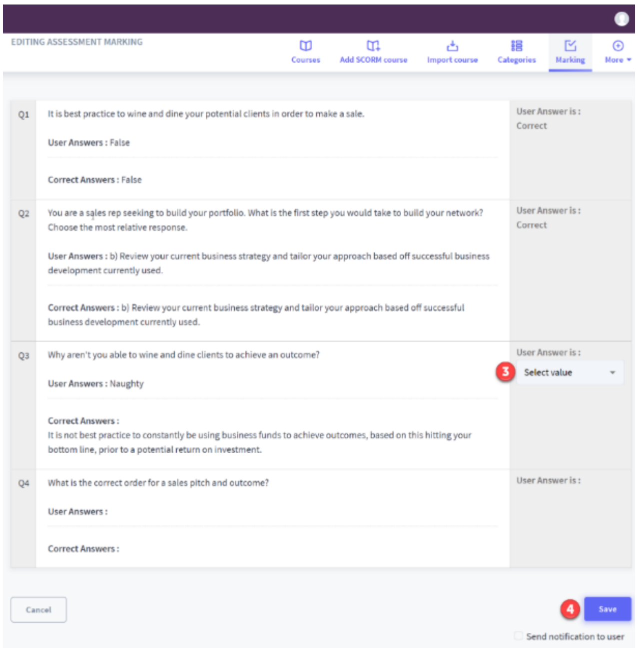


6.4.15 Marking

1. Click the ‘Marking’ tab
2. Click the ‘Edit’ icon for the course you would like to mark

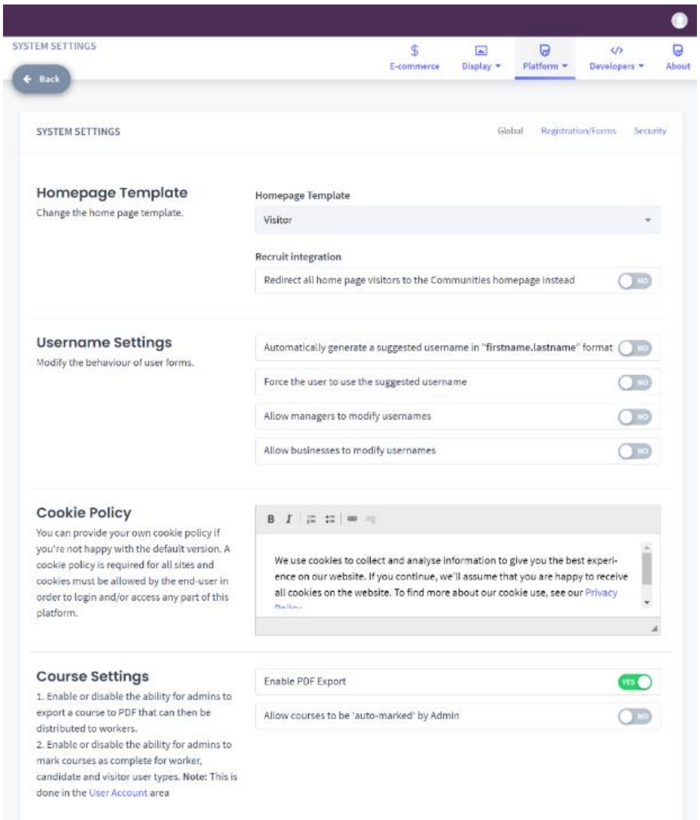


3. Select if the answer is correct or incorrect
4. Click ‘Save’ to notify the user



6.4.16 More – Global Settings

1. Click on the ‘More’ tab
2. Click ‘E-commerce settings’ from the drop-down
3. You will be taken to the System Settings

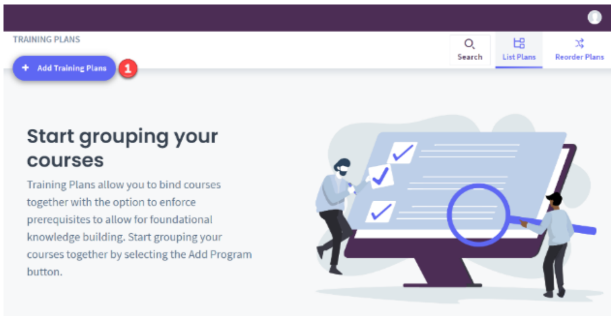


6.5 Training Plan Manager

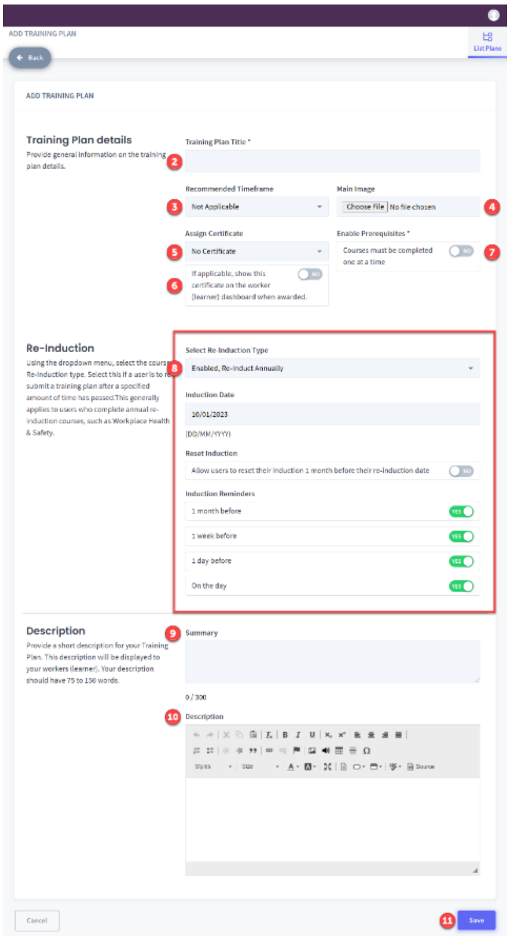
The Training Plans Manager allows you to bind courses together with the option to enforce prerequisites to allow for foundational knowledge building.

6.5.1 Adding a Training Plan

1. Click ‘Add Training Plans’

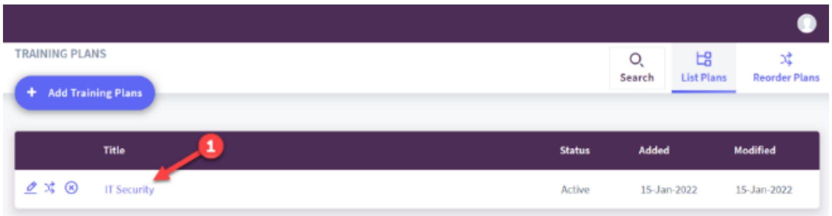


2. Add a title for the training plan
3. Select a recommended timeframe that you would like the learner to complete the training plan in
4. Click ‘Choose File’ to upload an image from your hard drive
5. Assign a certificate
6. Toggle Yes to show the certificate on the learner dashboard once awarded
7.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

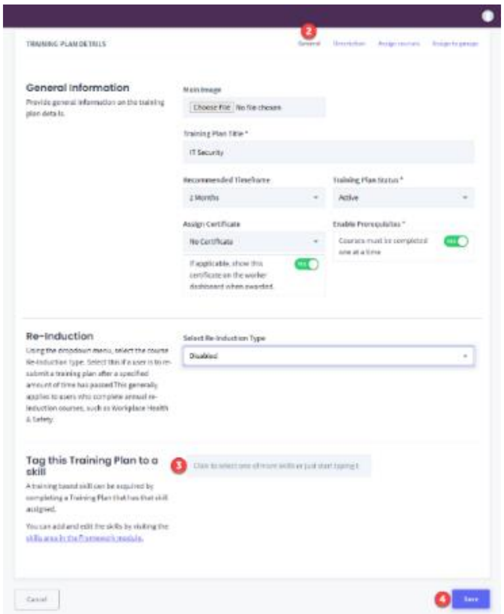


6.5.2 Tagging a Skill to a Training Plan

1. Click the training plan title

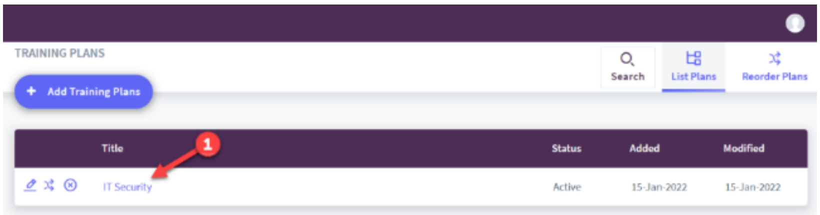


2. Click the general link
3. Type in the skill(s) the learner will achieve after completing the training plan
4. Click ‘Save’ to save changes

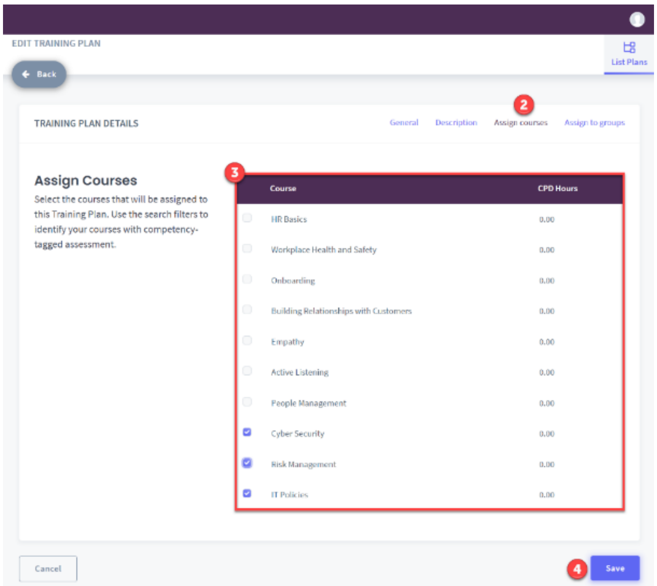


6.5.3 Assign Courses

1. Click the training plan title

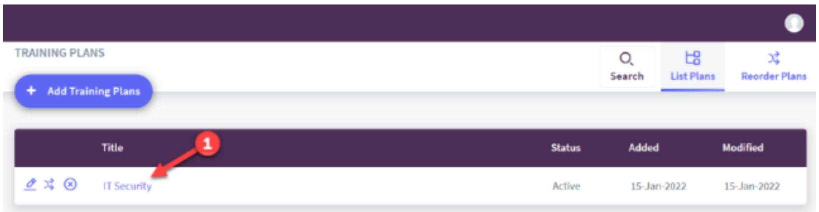


2. Click the ‘Assign courses’ link
3. Select the course(s) that will be assigned to the training plan
4. Click ‘Save’ to save changes

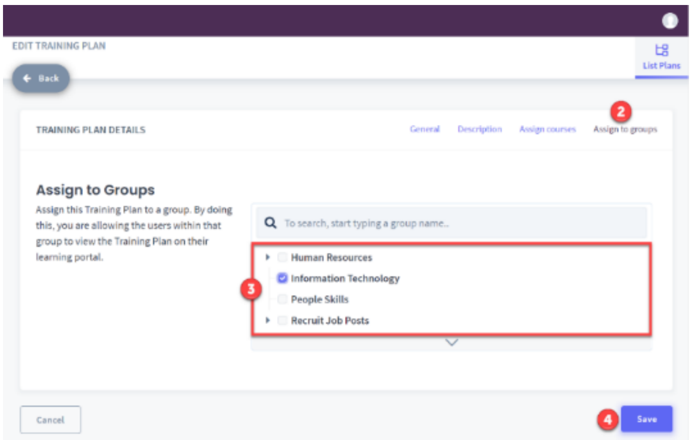


6.5.4 Assign Training Plan to Groups

1. Click the training plan title



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



6.6 Framework Manager

The Framework Manager allows you to build a skilling and compliance profile for your job roles. Frameworks feature required core skills for the role, the list of compliance and credential uploads and questions to assist in profiling candidates.

The framework enables a company to compare candidates for different job roles. The data is then collected in the Workflow Manager and stored in the Workforce Wallet. The Workforce Wallet provides a real time evaluation of the where the candidate is at against the Job Framework.

Frameworks provide data on:

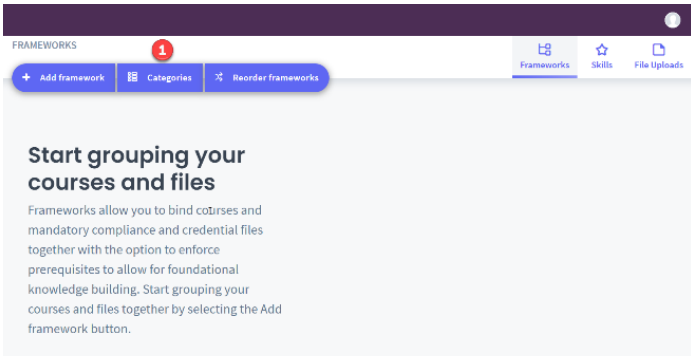
- The Pre-Screen/Onboard Workflows
- The Job Match Score
- The Work Ready Shield

Before building a framework, you will need to make sure you have already created:

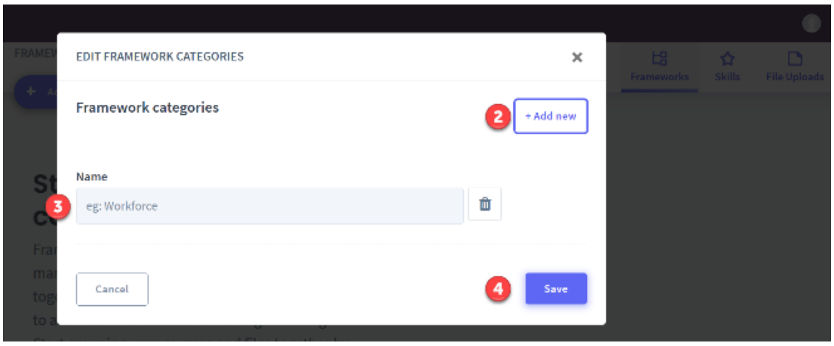
- The required training courses (please review the Content Publisher section of the Admin Guide)
- The required skills and skills evidence (please review the File Upload section of the Admin Guide).
- The required compliance, credential and vaccination files (see the File Upload Section of the Admin Guide).

6.6.1 Adding a Category

1. Click the 'Categories' button

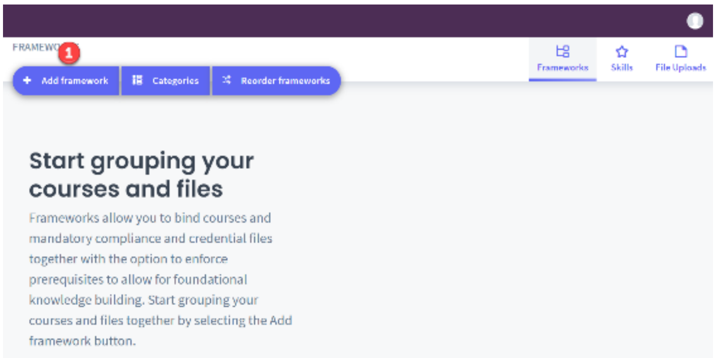


2. Click 'Add new'
3. Add a category name
   To add multiple categories, go back to step 2
4. When finished click 'Save' to save changes

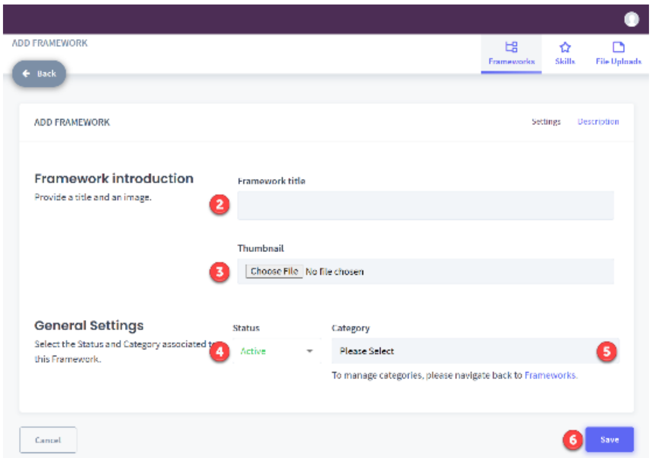


6.6.2 Adding a Framework

1. Click the 'Add framework' button



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 complete the framework when applying for a job
5. Select the category that you just created in the last step from the drop-down list
6. Click ‘Save’ to save the changes

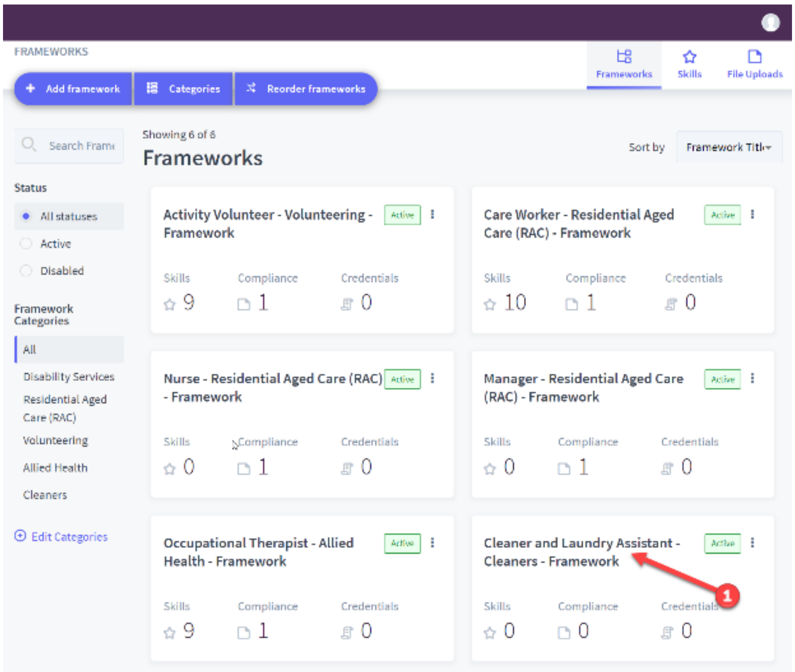


6.6.2.1 Skills

You can build all necessary skills required for the job role that the candidates and future employees can self-assess against or achieve by completing online courses. This ensures you have skilled staff upon commencement. Skills can be reviewed by a manager to ensure quality standards are met.

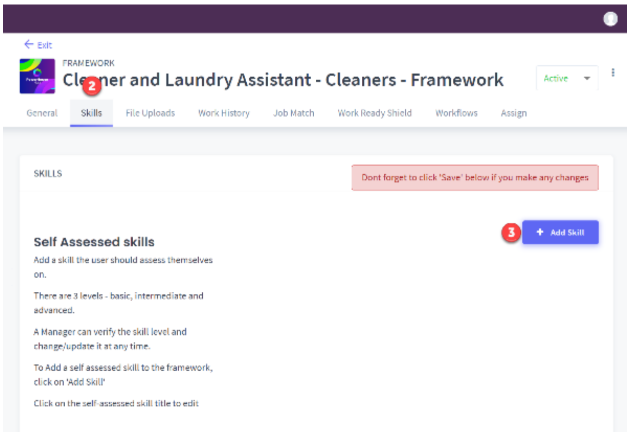
Please note that training-based skills (courses), self-assessed skills (file uploads, skills tab) and skills evidence (file uploads, skills evidence file type) need to be created before you can complete the skills section. Refer to the Skills, File Uploads, Content Publisher and Training Plan Manager sections.

1. Click on the Framework title

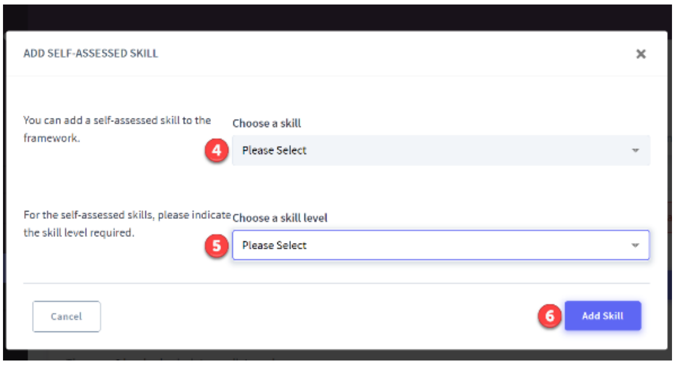


2. Click on the ‘Skills’ tab

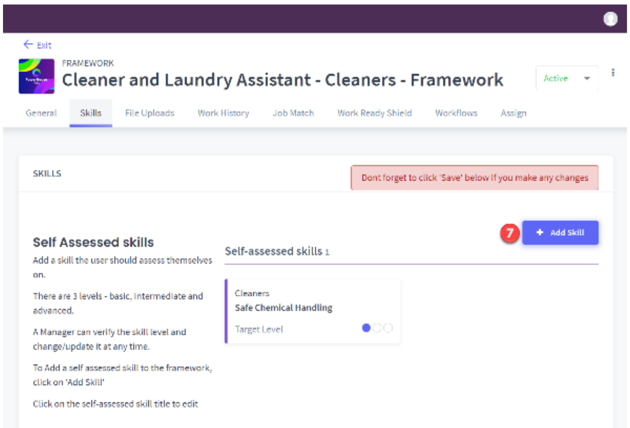
3. Click ‘Add skill’ to add a self-assessed skill. This is where the user can assess themselves against desired skill(s) for the role. A manager can verify the skill level and change/update it at any time.



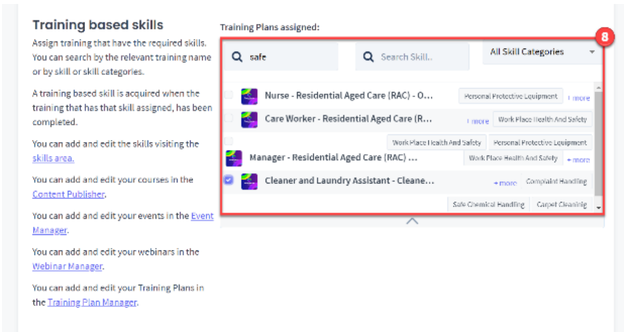
4. Choose a skill that the learner can self-assess against
5. Set the skill level that you require for this position
6. Click ‘Add skill’



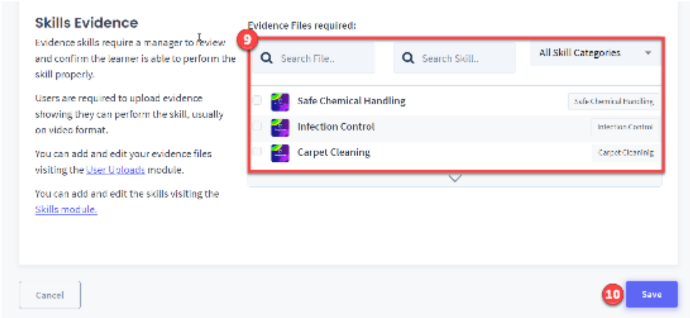
7. To add more skills, click ‘Add skill’ button again



8. Select the training courses / training plans that you would like to assign. (View the Content Publisher and Training Plan Manager sections for more information)



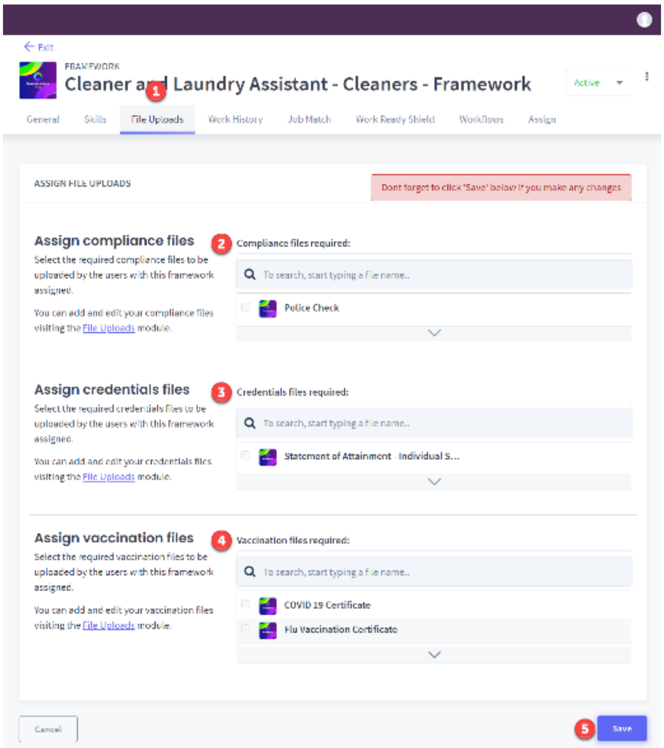
9. Select the skills evidence files (File Uploads) that will enable the candidate to upload evidence showing that that they can perform the skill properly. Their manager can then review and confirm that the learner has the required skill
10. Click ‘Save’ to save changes



6.6.2.2 *File Uploads*

Please note that you will need to create the required compliance, credential and vaccination evidence that’s required for the role in the File Uploads module before you can add them to the framework. (View the File Upload section more information).

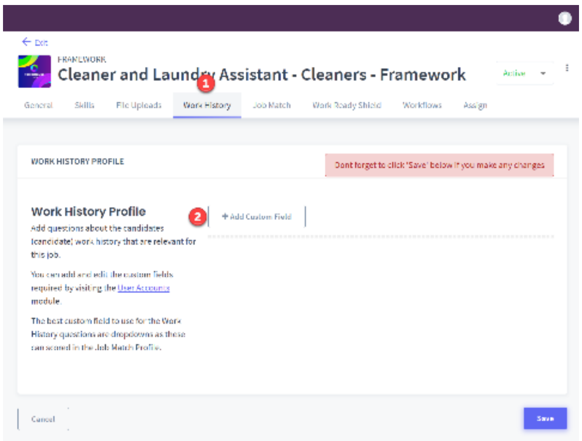
1. Click the ‘File Uploads’ tab
2. Select the required compliance files required for the role
3. Select the required credentials files required for the role
4. Select the required vaccination files required for the role
5. Click ‘Save’ to save changes



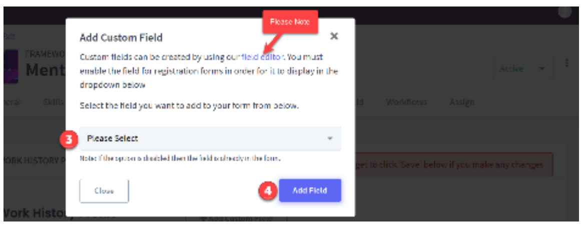
6.6.2.3 *Work History*

Work History is where you can add questions about the candidate’s work history that are relevant for the job. The best custom field to use for the Work History questions are drop-downs as these can be scored in the Job Match Profile.

1. Click the ‘Work History’ tab
2. Click ‘Add custom field’

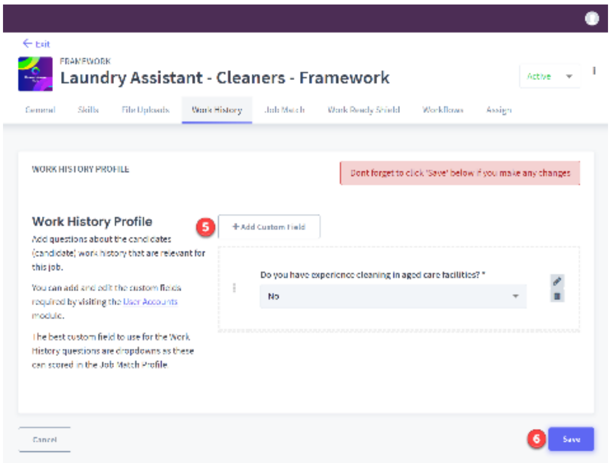


3. Select the question that you want to add from the drop-down box
4. Click ‘Add field’

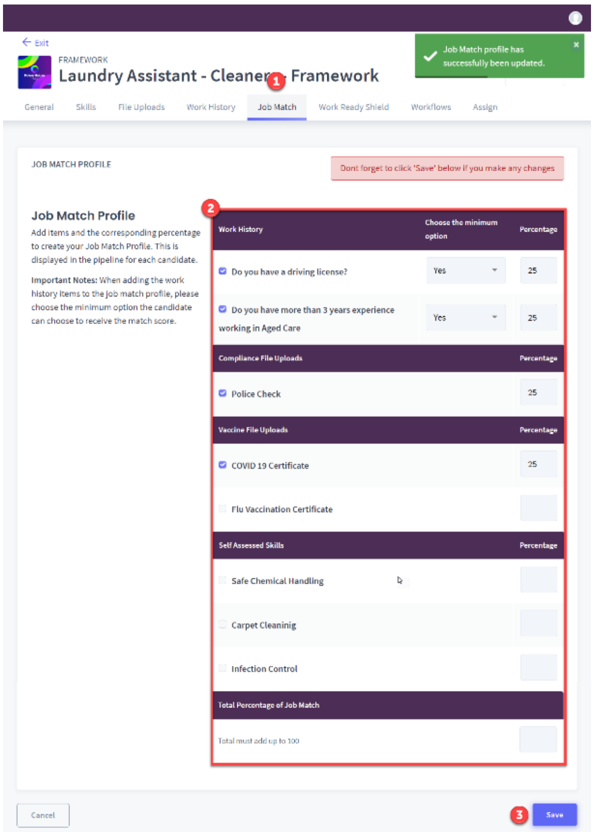


Please note, if you haven’t already created a question, you can do so by clicking the field editor link. (View the Custom Fields section for more information).

5. Click ‘Add custom field’ to add multiple questions
6. Click ‘Save’ to save changes



6.6.2.4 Job Match



The Job Match Score appears in the Candidate Pipeline and creates a score based on specific questions that relate to the job description. For example, if you need someone experienced, you could ask “Do you have more than 3 years’ experience in this industry?” Each question can be given a percentage weighting so that the positive responses to key questions will provide a higher job match score for the recruiter to view in the pipeline.

The job match works by asking candidate a series of yes or no questions. Each question is scored relating to the importance or desirability of the answer. The questions need to total 100.

Please note that the responses can be added to the candidate database and reports can be generated on this data.

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

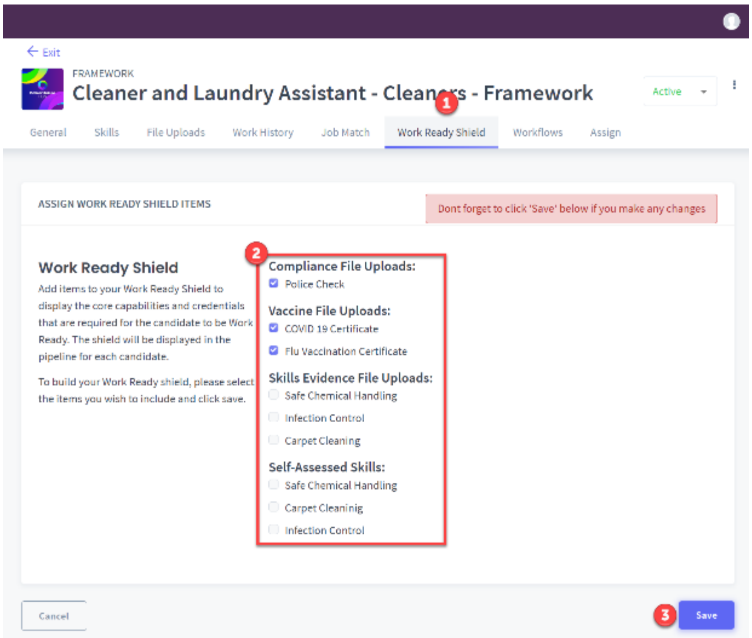
6.6.2.5 Work Ready Shield

The Work Ready Shield allows you to specify the tasks or uploads that the candidate requires to start work immediately. It is expected that these tasks or uploads will be part of the pre-screening selection. The Work Ready Shield allows the recruiter to target the exact files and information that is vital so that the person can be rostered or commence work immediately.

For example:

- Covid 19 Certificate
- Flu Vaccination Certificate
- Police Check
- Relevant Training courses (Certificate III or First Aid certificate)

1. Click on the 'Work Ready Shield' tab
2. Select the items that are required for the candidate to be work ready
3. Click 'Save' to save changes



6.6.2.6 Workflows

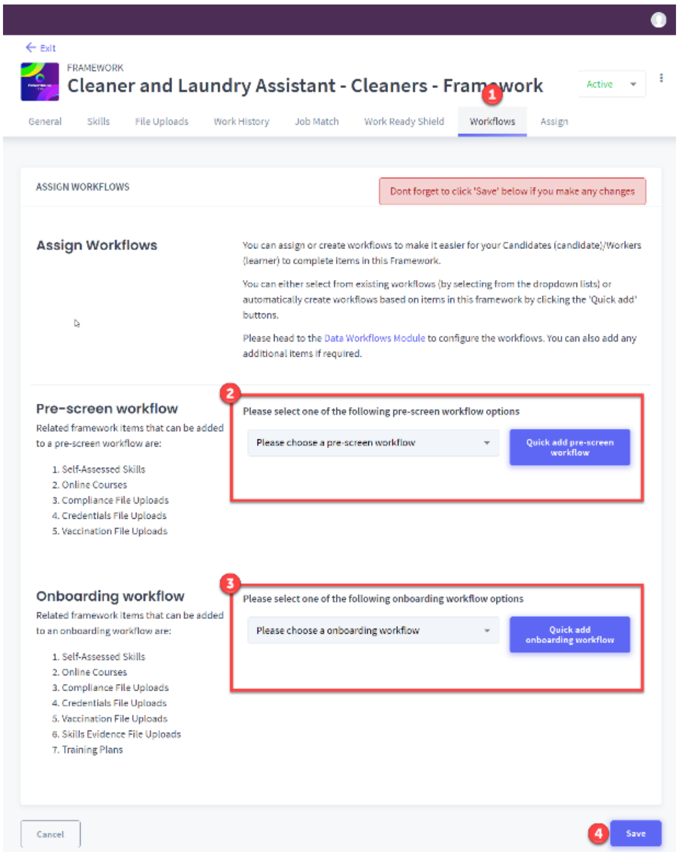
You can assign a pre-screen workflow, an onboarding workflow or both in this section. You can either select from existing workflows (by selecting from the drop-down lists) or create workflows based on items in this framework by clicking the 'Quick add' buttons.

For more information on creating a pre-screen or an onboarding workflow view the Workflow Manager section.

1. Click the 'Workflows' tab
2. To add a pre-screen workflow to the framework, select an existing pre-screen workflow from the drop-down box or click the 'Quick add pre-screen workflow' button
3. To add an onboarding workflow to the framework, select an existing onboarding workflow from the drop-down box or click the 'Quick add onboarding workflow' button

To add a pre-screen workflow and an onboarding workflow, fill out both sections.

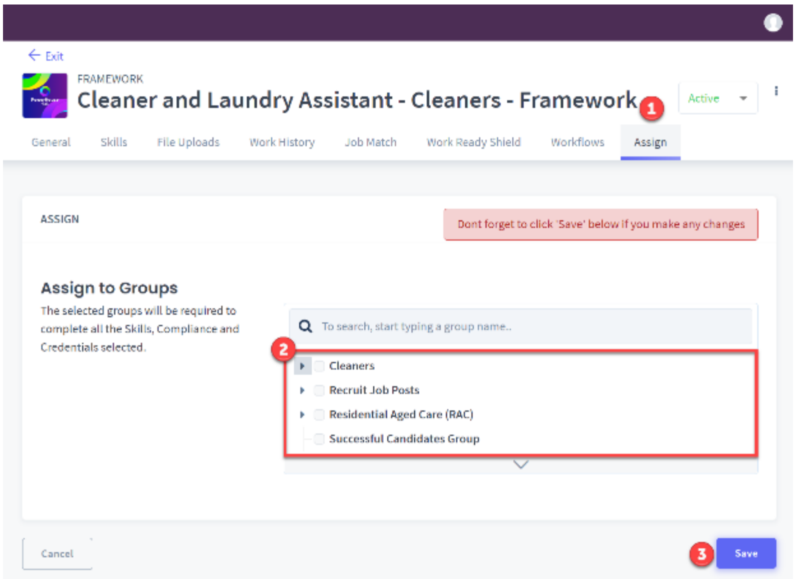
4. Click 'Save' to save changes



6.6.2.7 *Assigning a Framework to a Group*

When you assign a framework to a user group it means that each candidate in that user group will have the same framework assigned to them. For example, if there is a user group for cleaners, each cleaner is assigned the cleaner framework automatically in the group.

1. Click the ‘Assign’ tab
2. Select the group(s) that you would like to assign the framework to
3. Click ‘Save’ to save changes



6.7 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.

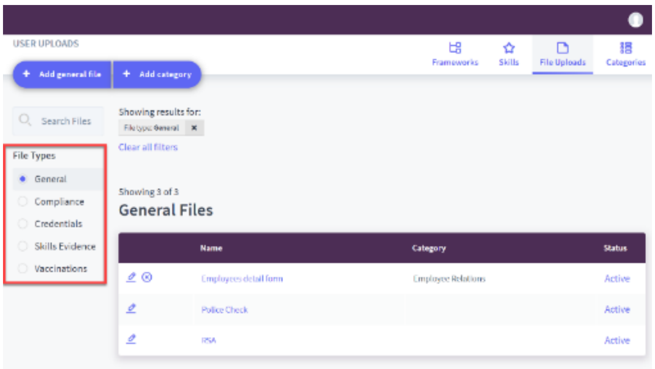
Best practice in building your foundation is to ensure the ‘Skills’ module is populated with relevant skills. It’s important for you to have a full list of skills populated prior to adding ‘Skills Evidence’ within File Uploads, as the Skills module allows candidates to provide evidence toward a certain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

6.7.1 File Types

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

- General
- Compliance
- Credentials
- Skills Evidence
- Vaccinations

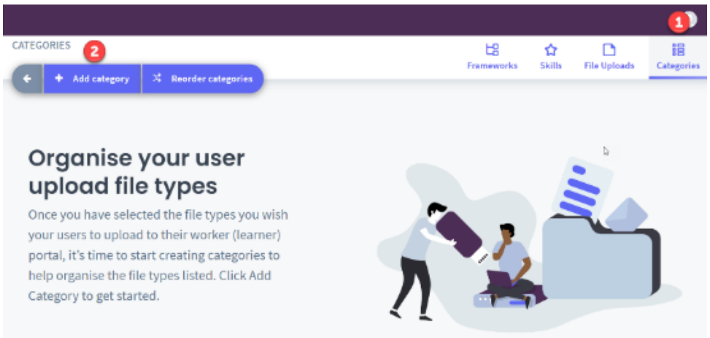
All these file types help candidates build their professional Workforce Wallet, ensuring best suitability for employment.



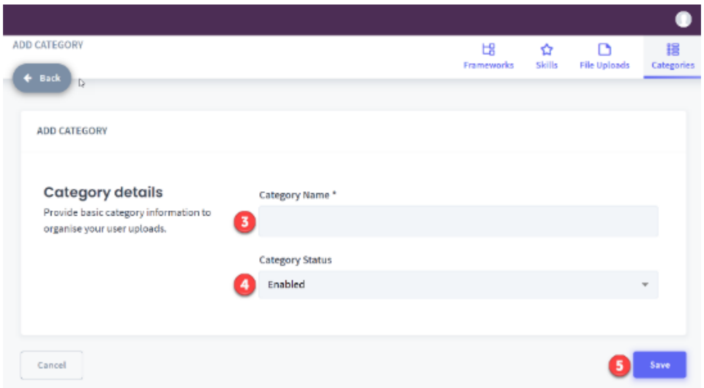
6.7.2 Categories

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'



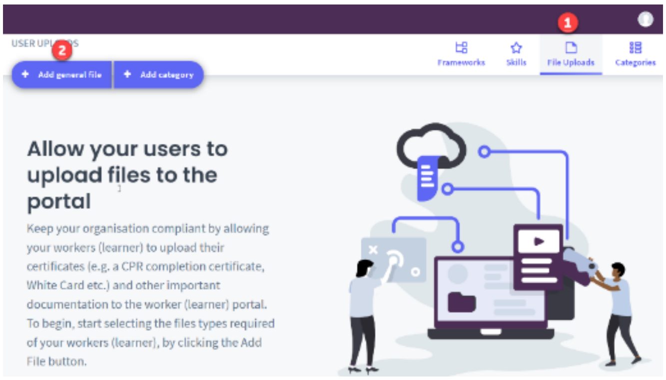
3. Add a category title
4. Set the status. Active: Category is live on the platform and users can upload their files. Disabled: Category cannot be seen on the platform.
5. Click 'Save'



6.7.3 Adding a File

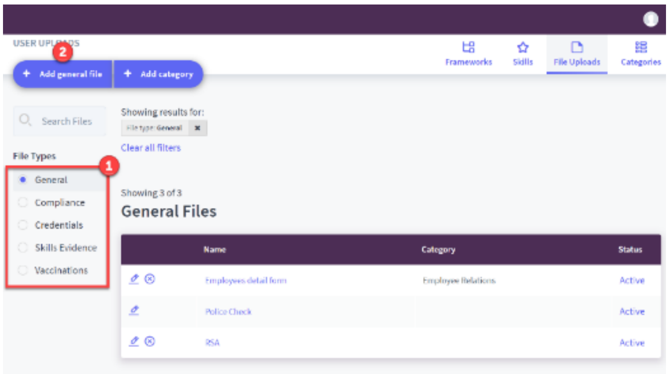
When adding a file for the first time you will only have the option to add a general file.

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

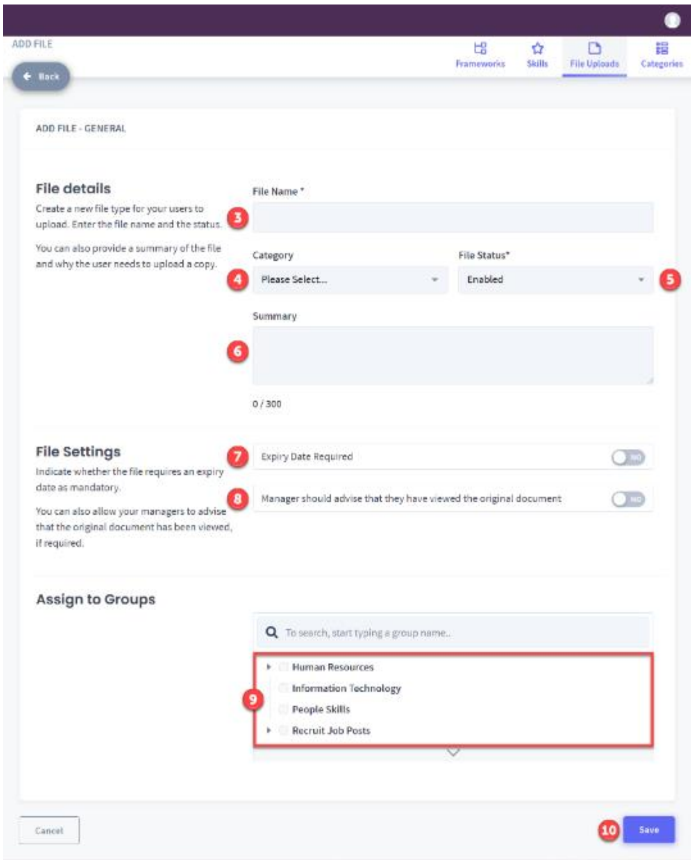


When adding subsequent files (general, compliance credential, skills evidence, or vaccination) your screen will look slightly different.

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

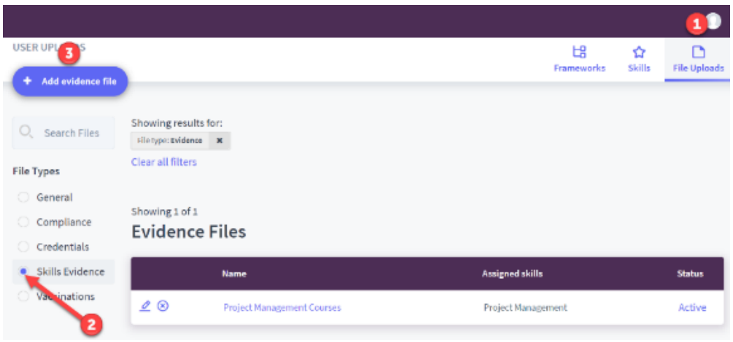


3. Enter the File Name
4. Select the category
5. Set the file status. Active: File is live on the platform and users can upload their files. Disabled: File cannot be seen in the user's portal.
6. Add a summary
7. Toggle ON/OFF if an expiry date is required
8. Toggle YES/NO if the manager should advise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

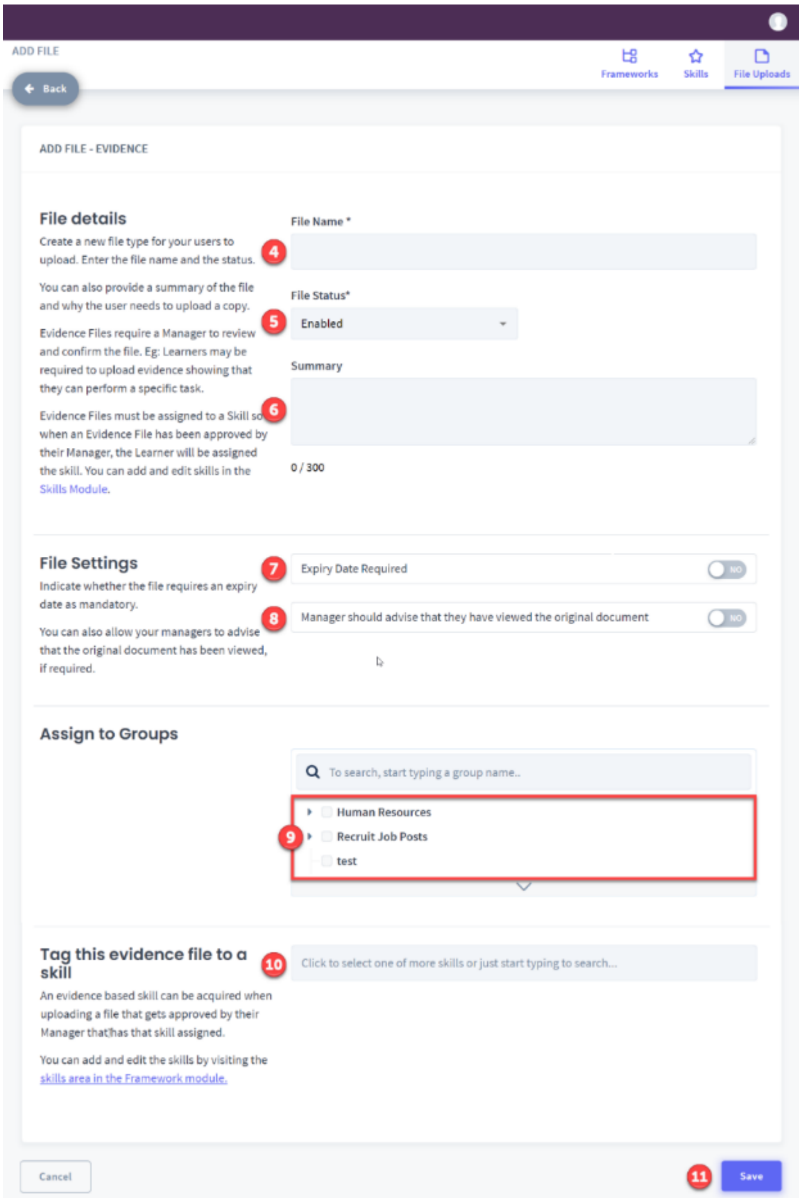


6.7.4 Adding a Skills Evidence File Upload

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



4. Enter the File Name
5. Set the file status. Active: File is live on the platform and users can upload their files. Disabled: File cannot be seen in the user's 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'

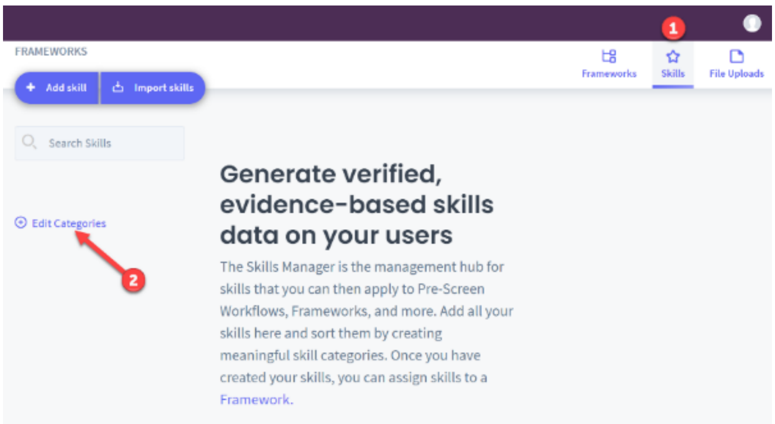


6.8 Skills

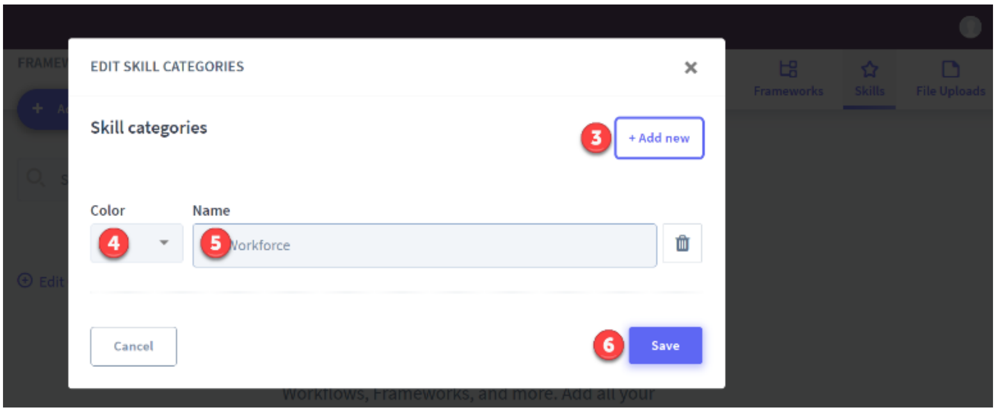
The Skills Manager is located inside of the File Uploads Module. This is where you can add self-assessed skills the management hub for skills that you can then apply to pre-screen workflows, frameworks, and more.

6.8.1 Adding a Category

1. Select the 'Skills' tab in the Framework Manager
2. Click 'Edit Categories'

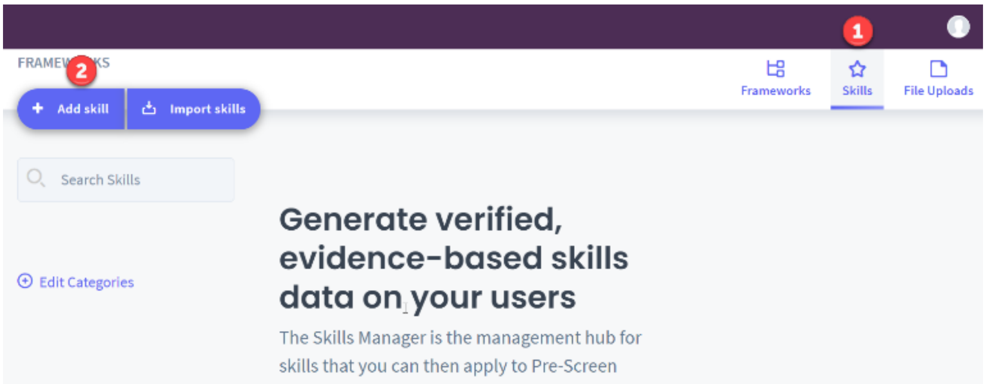


3. Click ‘Add New’
4. Choose a colour to represent the category
5. Enter a category name
   To add additional categories, go back to step 2
6. Click ‘Save’ to save changes

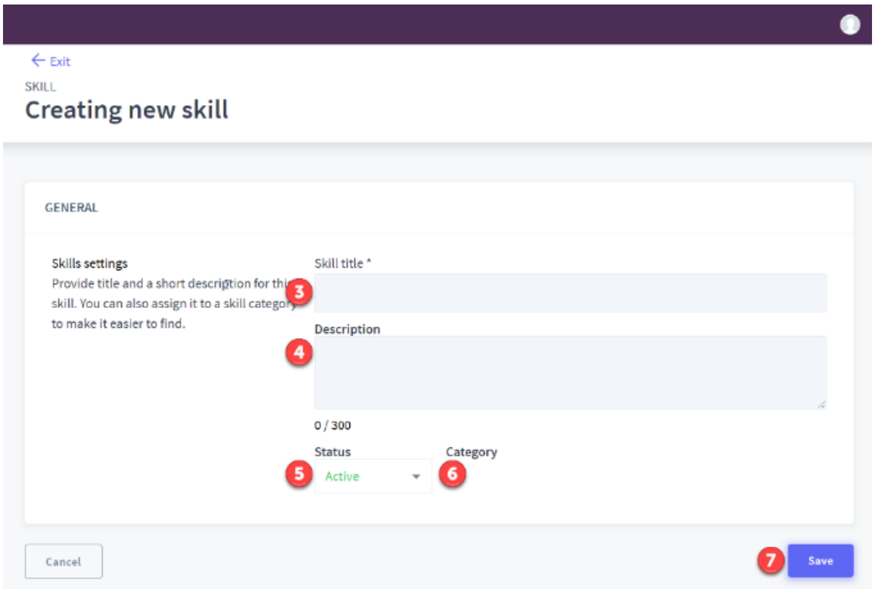


6.8.2 Adding a Skill

1. Select the ‘Skills’ tab in the Framework Manager
2. Click ‘Add skill’

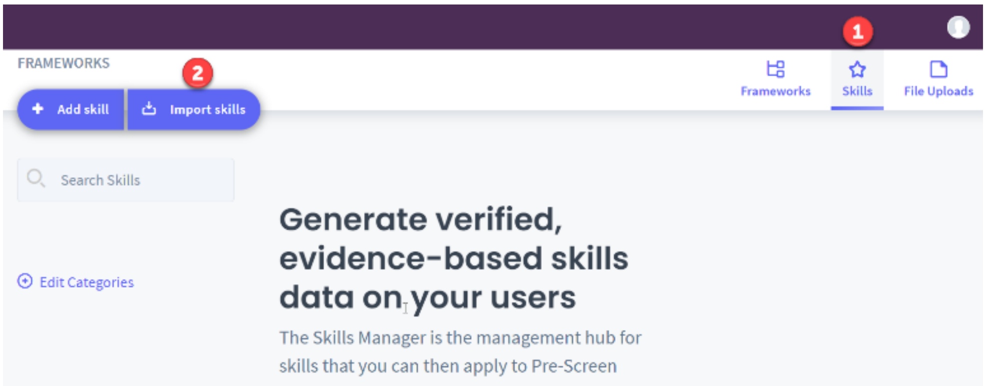


3. Add a skill title
4. Add a description
5. Set the status: Live mean the skill is ready to use. Disabled means the skill won’t be seen on the platform
6. Select a category from the drop-down box
7. Click ‘Save’ to save changes

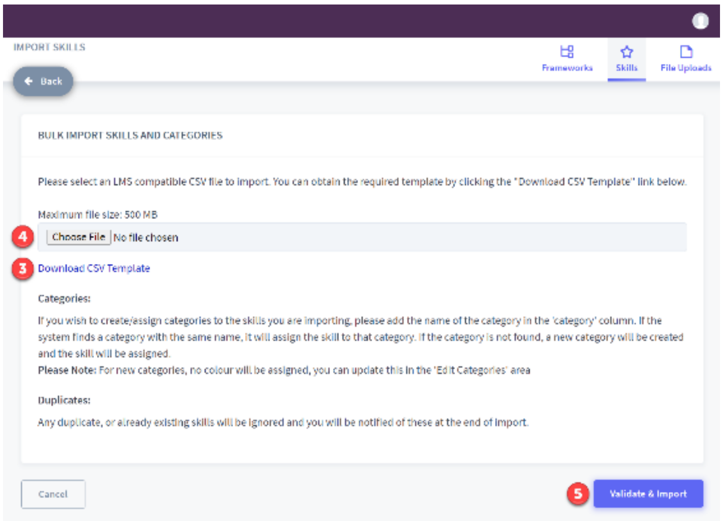


6.8.3 Importing a Skill

1. Select the ‘Skills’ tab in the framework manager
2. Click ‘Import skills’



3. Download and fill out the CSV template
4. Click ‘Choose File’ to upload and select the completed CSV file from your hard drive
5. Click ‘Validate & Import’

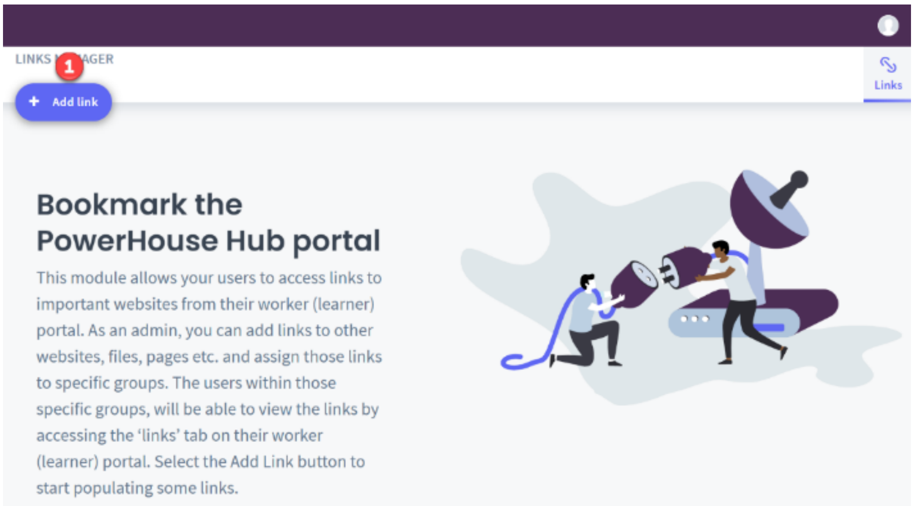


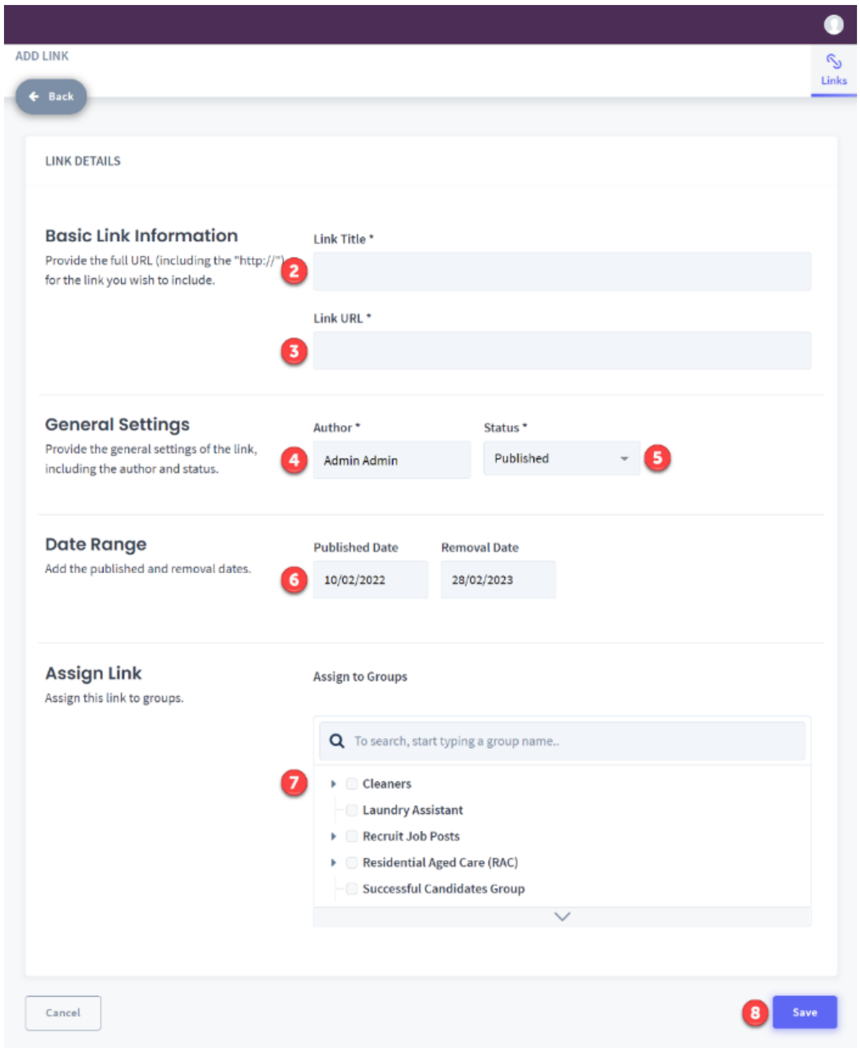
7 Communication

7.1 Links Manager

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 the ‘Add Link’ button





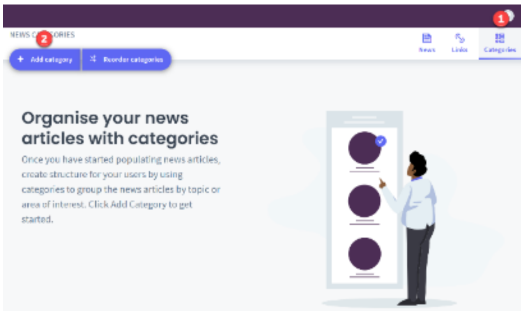
2. Add a link title
3. Provide the full URL (including https://)
4. Type in the name of the person creating the link
5. Select the status from the drop-down box. Published means the learner will be able to view the link on their portal. Draft means the learner will not see the link in their portal.
6. Add the publish and removal date of the link
7. Assign the link to a group(s)
8. Click ‘Save’

7.2 News Manager

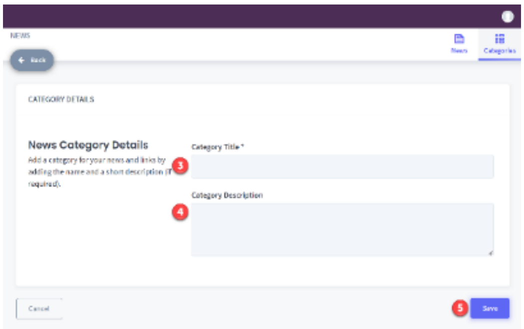
Broadcast company updates and announcements to your users through the News Editor. You can also choose to email updates to your staff with the click of a button. Simply write your news update, consider adding relevant links or images, then assign it to user groups.

7.2.1 Adding a News Category

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

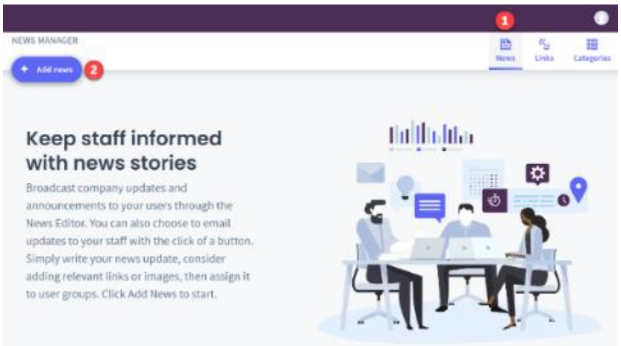


3. Add a category title
4. Add a description
5. Click 'Save'

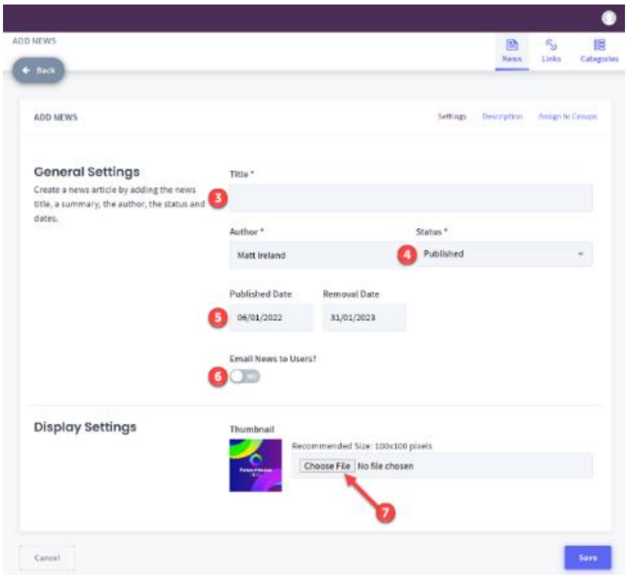


7.2.2 Add News

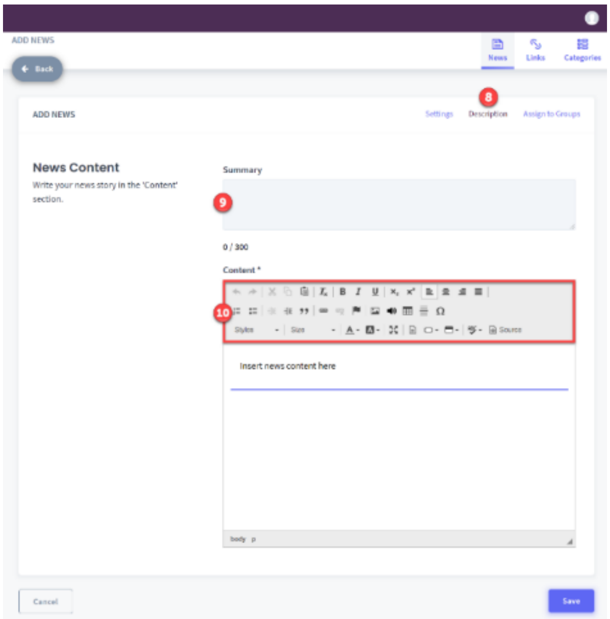
1. Click on the 'News' tab
2. Click 'Add news'



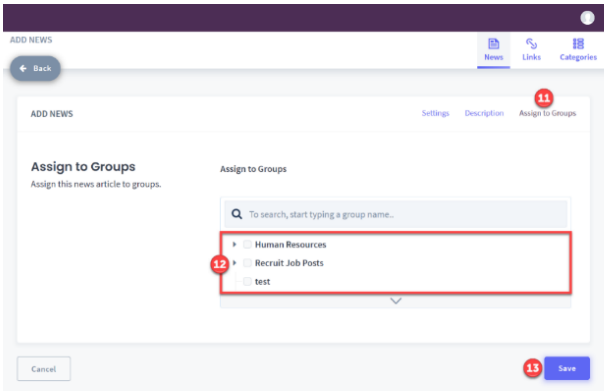
3. Add a title
4. Set the status. Published: News article is live and can be viewed. Draft: Keeps news hidden from users
5. Add a publish and removal date. Learners won't be able to view the news article until the selected publish date and won't be able to view after the removal date
6. Toggle YES/NO 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

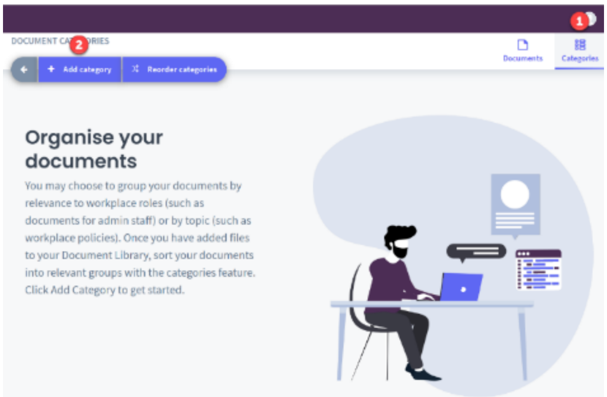


11. Click the ‘Assign to Groups’ link
12. Assign news article to the relevant group(s)
13. Click ‘Save’



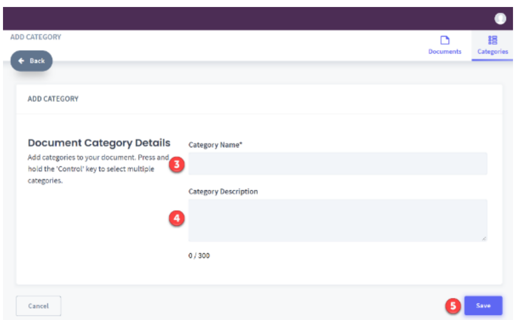
7.3 Document Library

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.



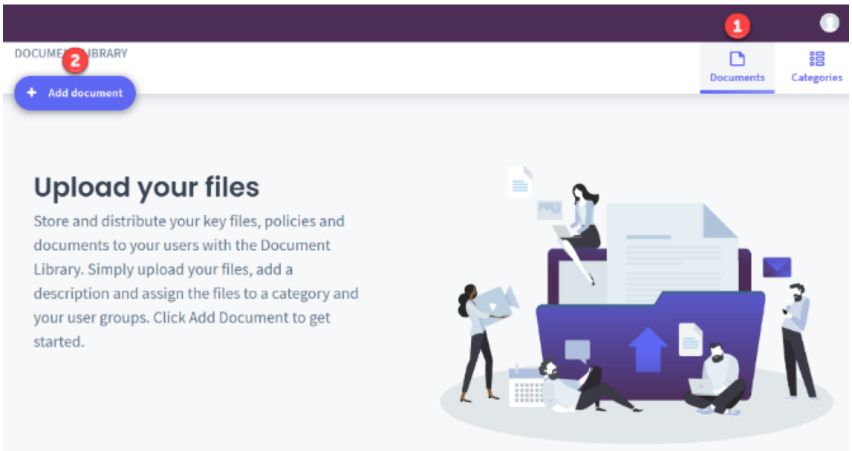
7.3.1 Adding a Category

1. Click on the ‘Categories’ tab
2. Click ‘Add category’
3. Add a category title
4. Add a description
5. Click ‘Save’

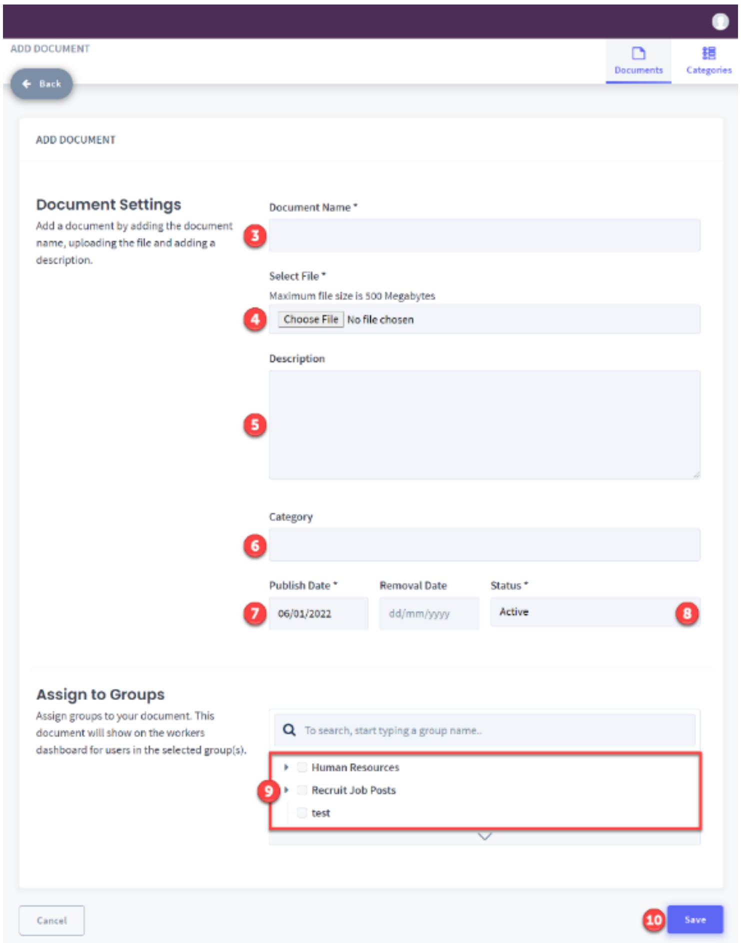


7.3.2 Adding a Document

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 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 users.
9. Assign the link to the relevant group(s)
10. Click 'Save'

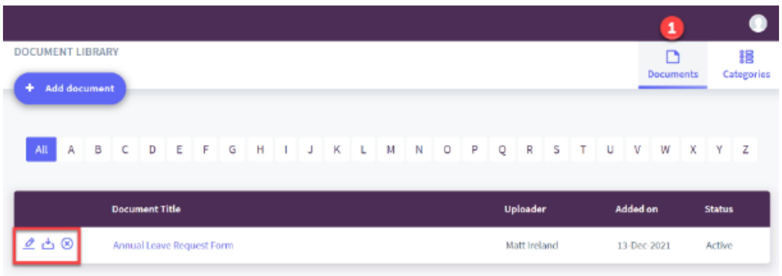


7.3.3 Document Library Actions

1. Click on the 'Documents' tab

Documents action buttons allow you to:

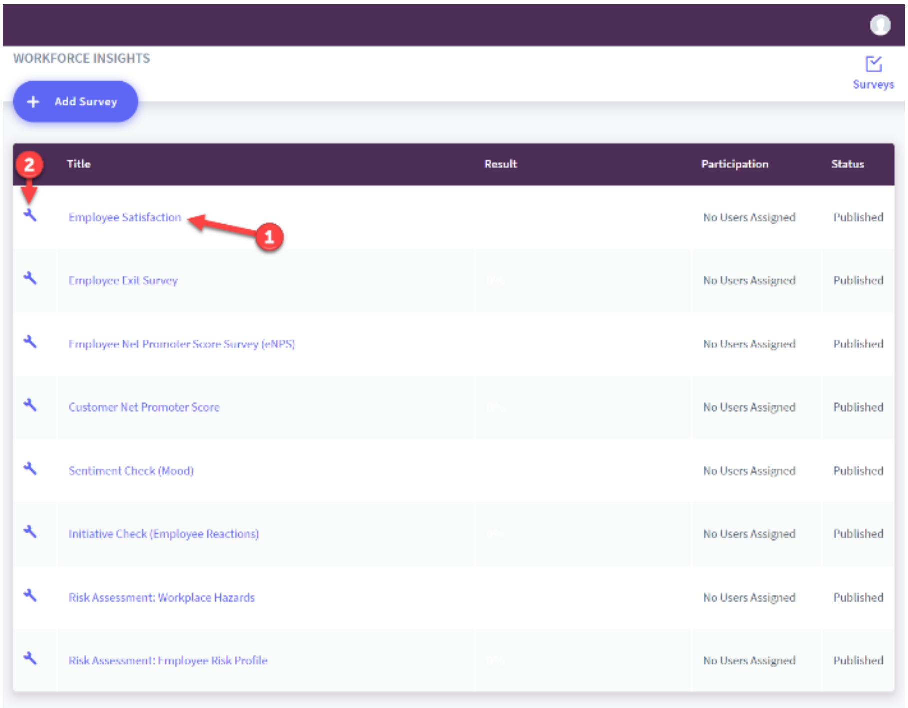
- Edit the document
- Download the document
- Delete the document



7.4 Workforce Insights

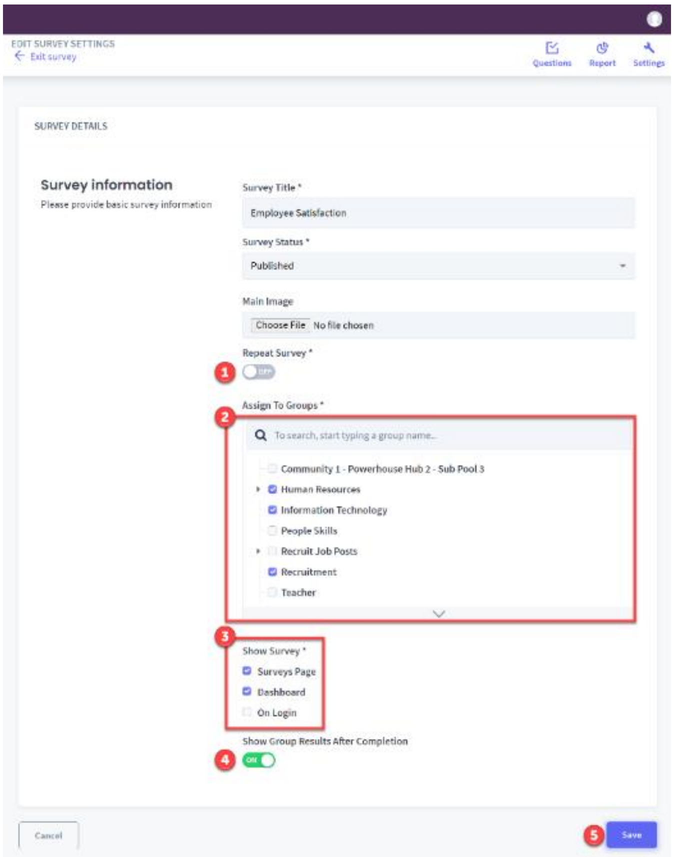
This is where you can choose from pre-made surveys to get insight from your workforce. Surveys can be sent as a one-off or automatically sent after a selected number of days.

1. Click on a survey title to view the survey
2. Click on the spanner icon to view the survey settings



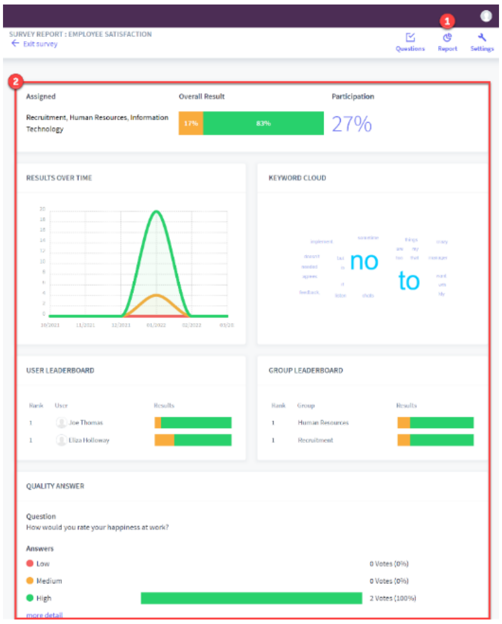
7.4.1 Survey Settings

1. Toggle ON to repeat the survey, then select repeat frequency and start date
2. Assign the survey to the relevant group(s)
3. Select where you want the survey to be seen on the learner's portal
4. Toggle ON to show group results after completion
5. Click 'Save' to save changes



7.4.2 Survey Report

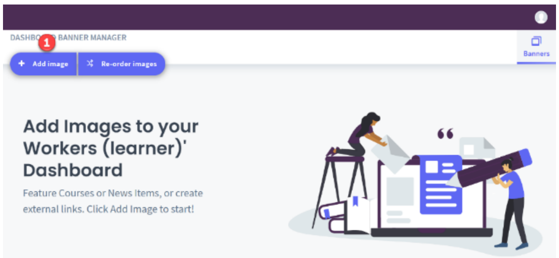
1. Click on the ‘Report’ tab
2. Review the results of your chosen survey



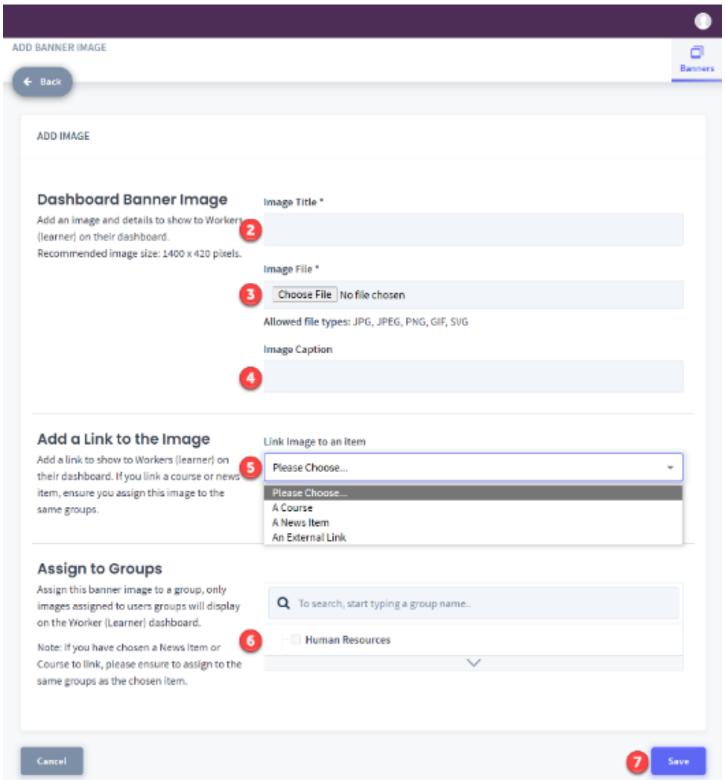
7.5 User Dashboard Banner

The Dashboard Banner module allows you to feature courses or news items, or external links.

1. Click ‘Add image’



2. Add image title
3. Click ‘Choose File’ and upload an 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. Options include a course, a news item or an external link
6. Assign the banner image to a group(s)
7. Click ‘Save’

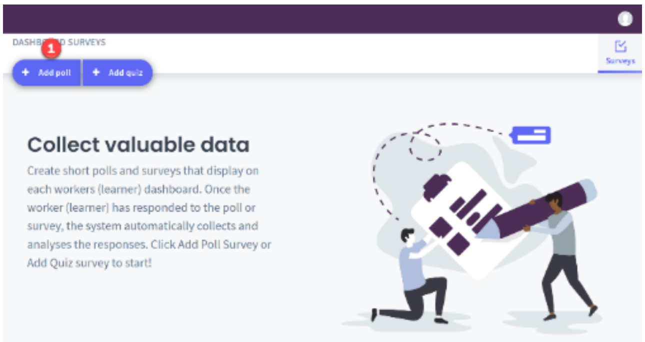


7.6 Dashboard Surveys

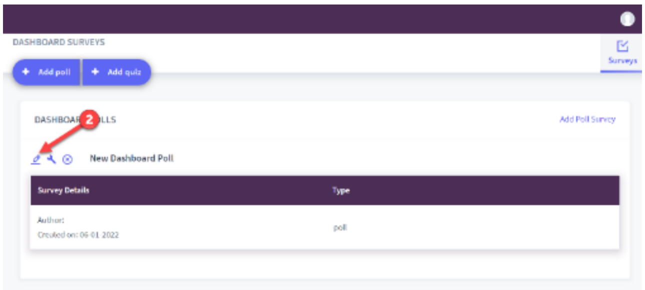
Dashboard Surveys can collect valuable data for your organisation. Create short polls and surveys that display on each worker (learner) dashboard. Once the worker has responded to the poll or survey, the system automatically collects and analyses the responses.

7.6.1 Add a Poll (True Or False Question)

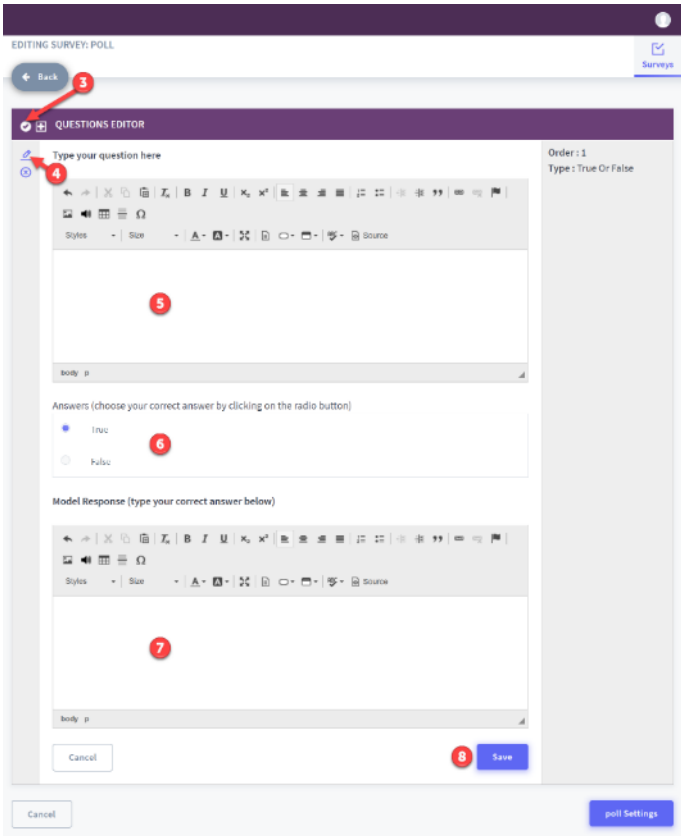
1. Click 'Add poll'



2. Click 'Edit' to add questions

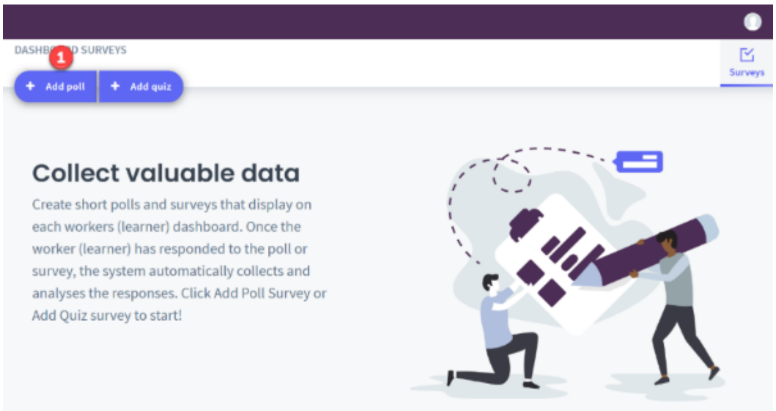


3. Click to add true or false question
4. Click the 'Edit question' icon
5. Click in the box to type your question
6. Choose the correct answer by clicking on the radio button
7. Click in the box to type the correct answer
8. Go back to step 2 to add additional questions. When finished click 'Save'

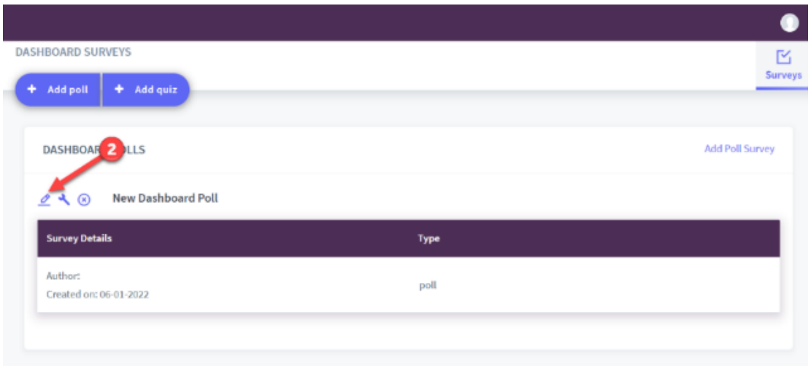


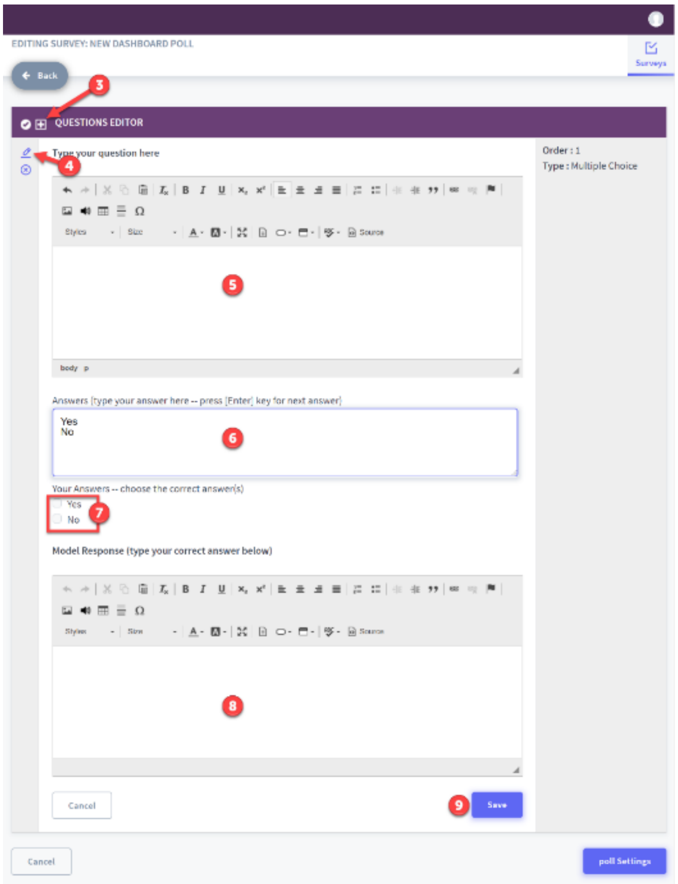
7.6.2 Add a Poll (Multiple Choice Question)

1. Click 'Add poll'



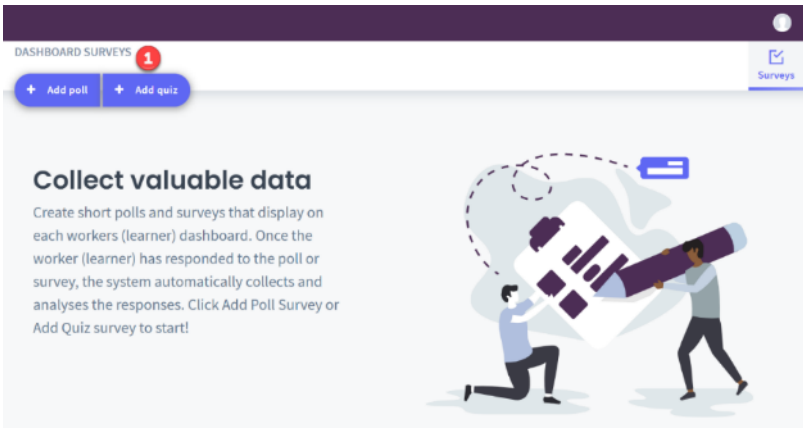
2. Click 'Edit' to add questions





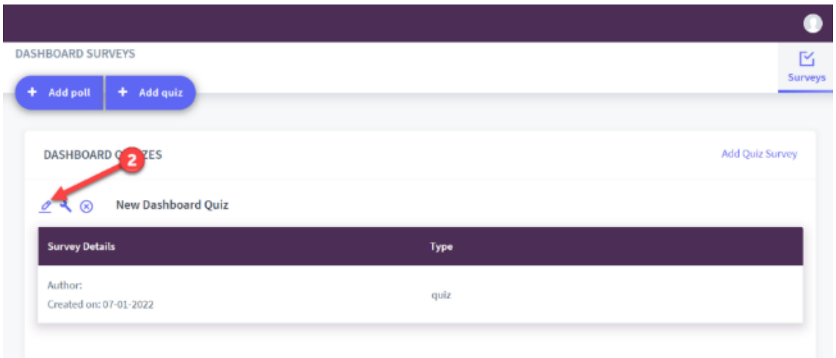
3. Click to add multiple choice question
4. Click the 'Edit question' icon
5. Click in the box to type your question
6. Click in the box to type your multiple-choice questions. Press the [enter] key to type the next multiple-choice answer. You can add as many answers as you need
7. Select the tick box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

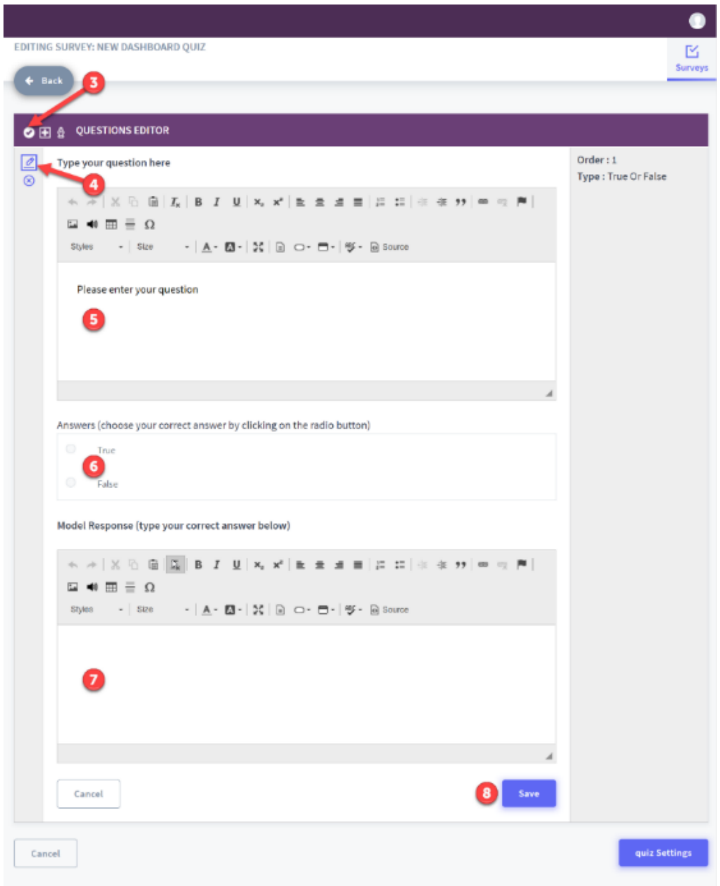
7.6.3 Add a Quiz (True or False Question)



1. Click 'Add quiz'

2. Click 'Edit' to add question

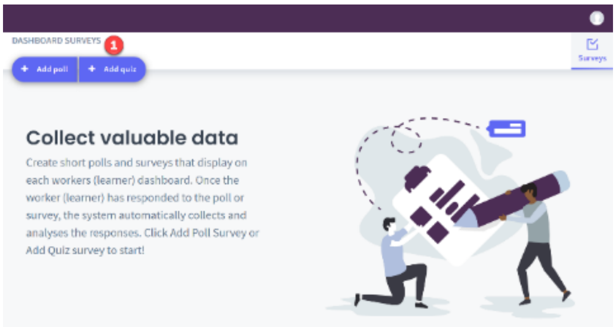




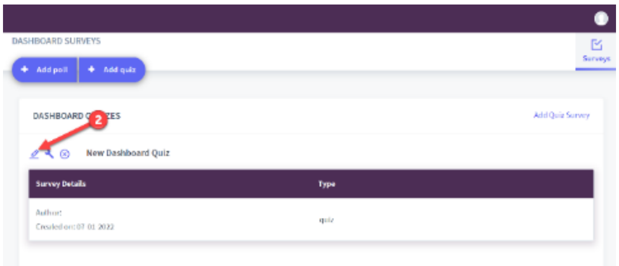
3. Click to add true or false question
4. Click 'Edit question'
5. Click in the box to type your question
6. Click on the radio box to choose your correct answer
7. Click in the box to type the correct answer
8. Go back to step 3 to add additional questions. When finished click 'Save'

7.6.4 Add a Quiz (Add Multiple Choice Question)

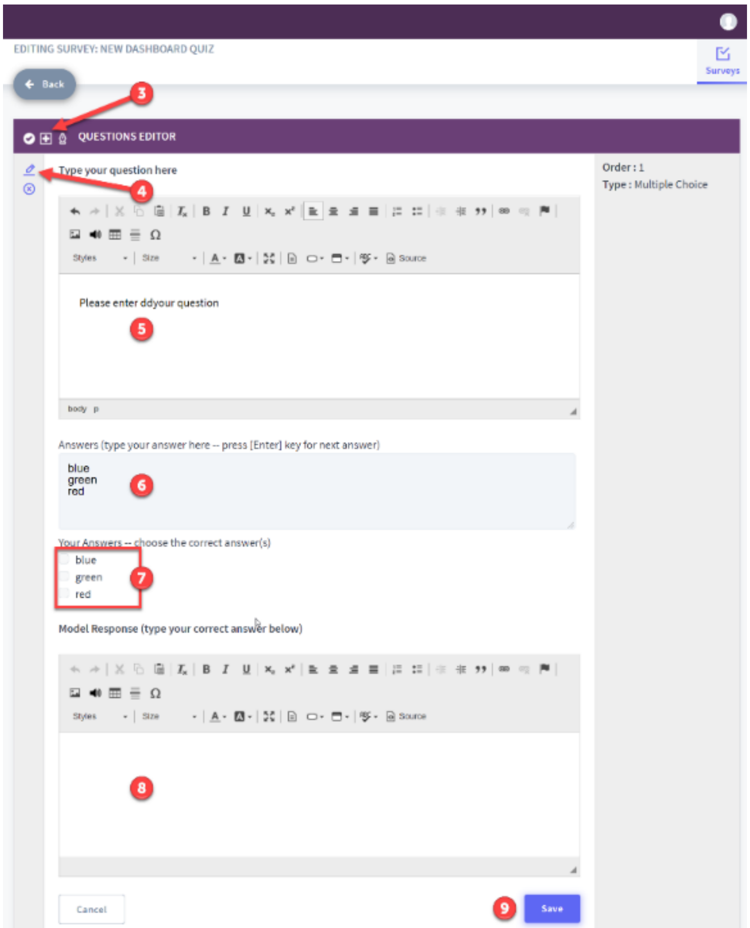
1. Click 'Add quiz'



2. Click 'Edit' to add question

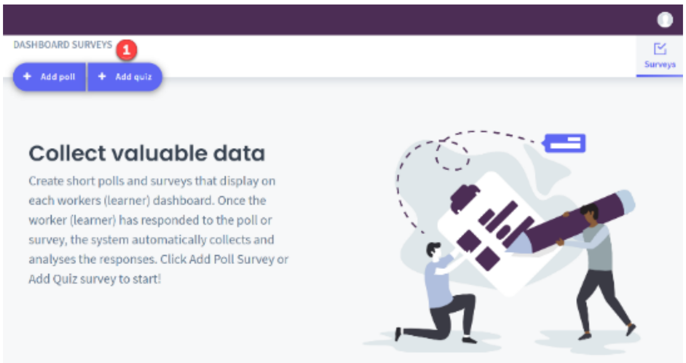


3. Click to add multiple choice question
4. Click 'Edit question'
5. Click in the box to type your question
6. Click in the box to type your answer. Press the [enter] key to type the next multiple-choice answer
7. Select the correct answer
8. Click in the box to type the correct answer
9. Go back to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

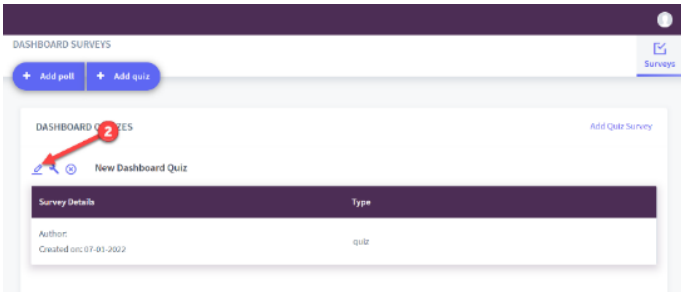


7.6.5 Add a Quiz (Short Answer Question)

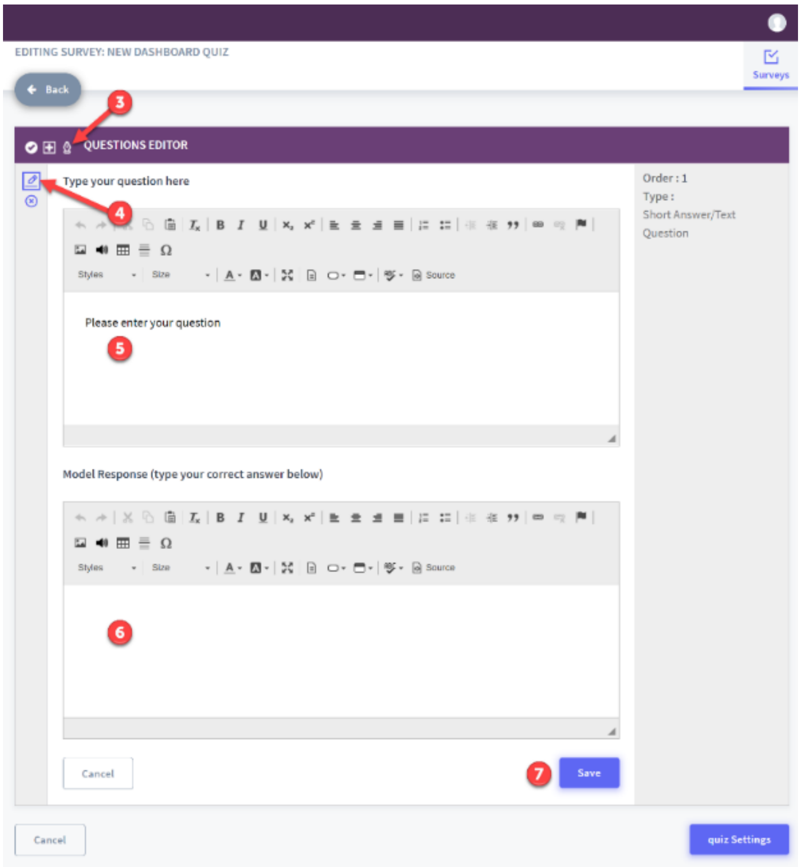
1. Click 'Add quiz'



2. Click 'Edit' to add question

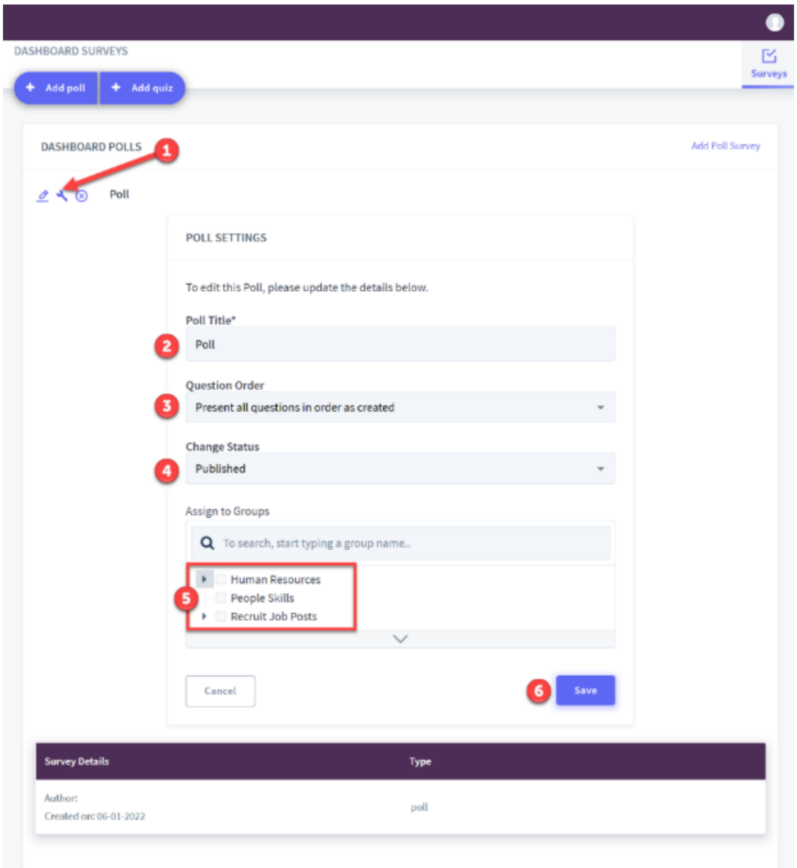


3. Click to add short answer question
4. Click 'Edit question'
5. Click in the box to type your question
6. Click in the box to type the correct answer
7. Go back to step 3 to add additional questions. When finished click 'Save'



7.6.6 Poll and Quiz Settings

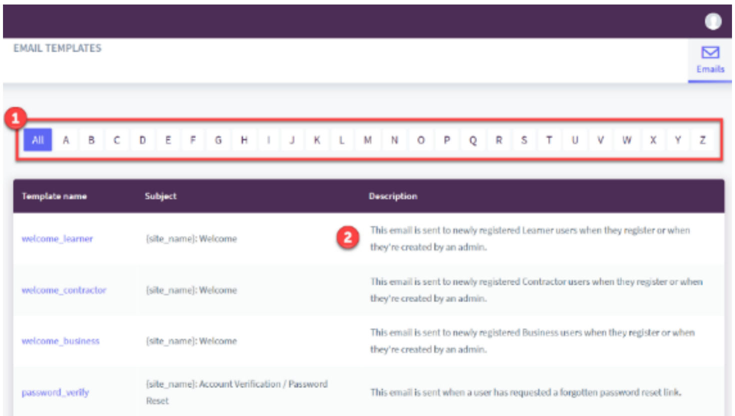
1. Click the 'Settings' icon
2. Click to edit Poll/Quiz title
3. Option to present questions in the order they were created or to randomise questions
4. Set Status. Published will set the Poll/Quiz live. Draft will stop to Poll/Quiz from being seen by the learner.
5. Assign Poll/Quiz to groups
6. Click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



8 Administration

8.1 Email Templates

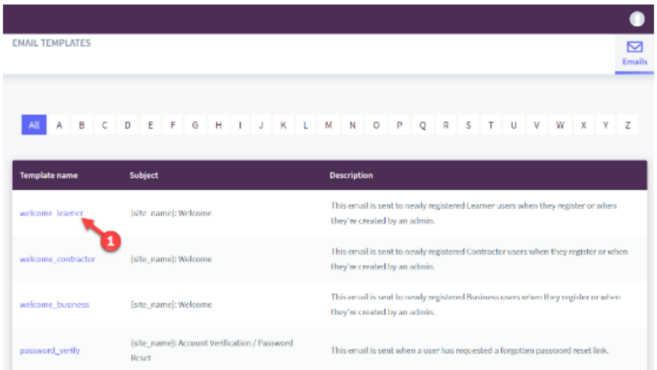
Email templates are pre-created emails that the platform automatically sends once an action has been triggered. For example, you can automatically send a welcome email to a new user. All templates can be edited if you need to change the wording.



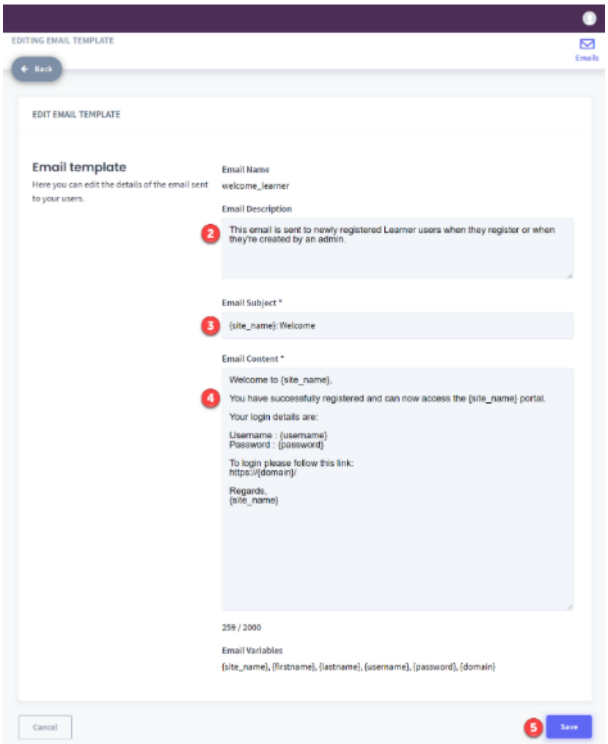
1. Click on a letter to only display the templates names starting with that letter
2. The description field describes what the template is used for

8.1.1 Editing an Email Template

1. Click on the template name



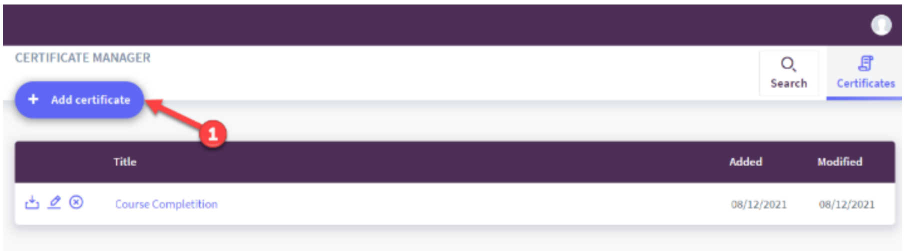
2. Only administrators can view the email description. **It is advised that this text isn't changed**
3. Only edit the email subject text. **Don't edit the code, which is anything in brackets or directly after the brackets {} for example {site_name}:**
4. Only edit the email content text. **Don't edit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



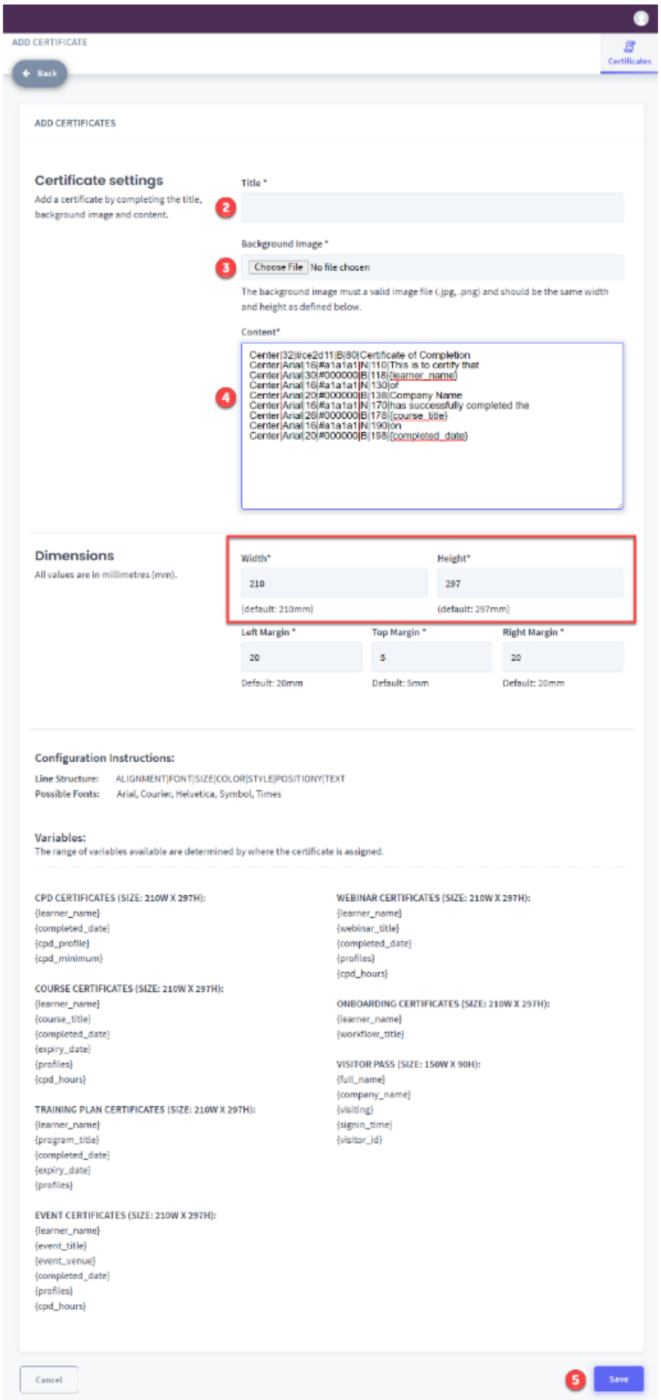
8.2 Certificate Manager

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

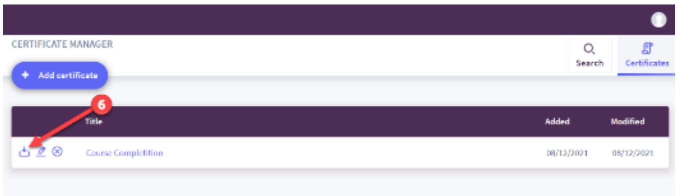
1. Click 'Add certificate'



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



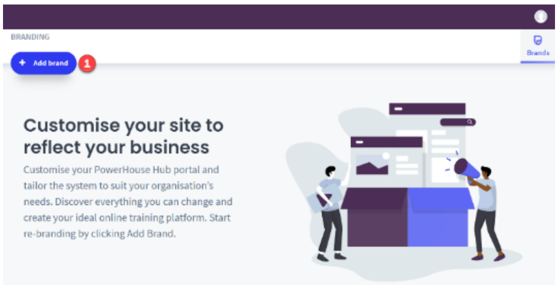
6. Click the 'Download' button to view your certificate



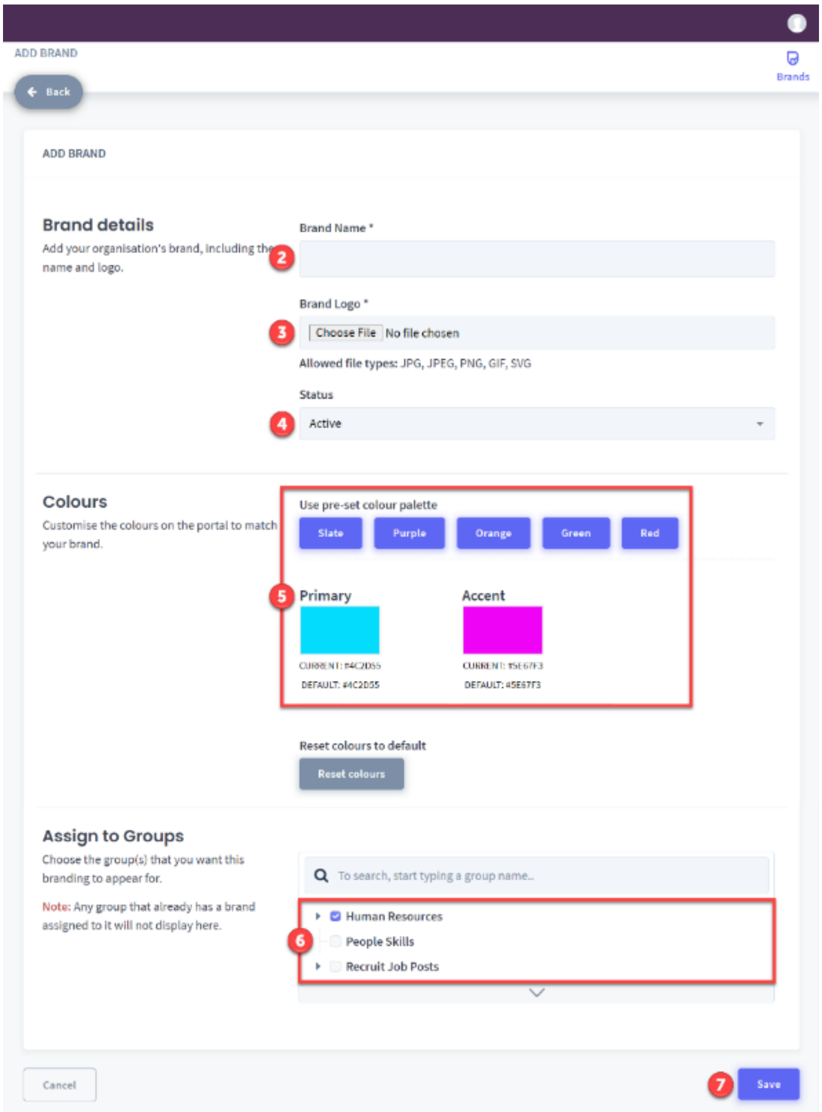
8.3 Group Branding

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 won’t be seen by the users
5. Select a 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’



In this example, when logging in as a member of the Human Resources group, you will see that the logo and colour scheme has changed.

8.4 Visitor Manager

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

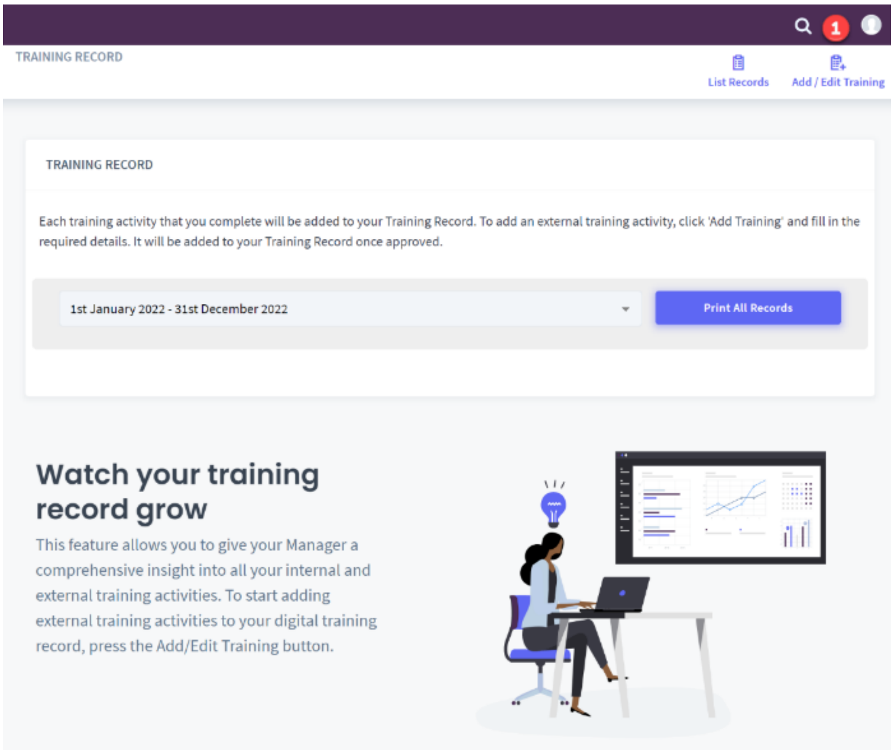
8.5 Training Records

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.

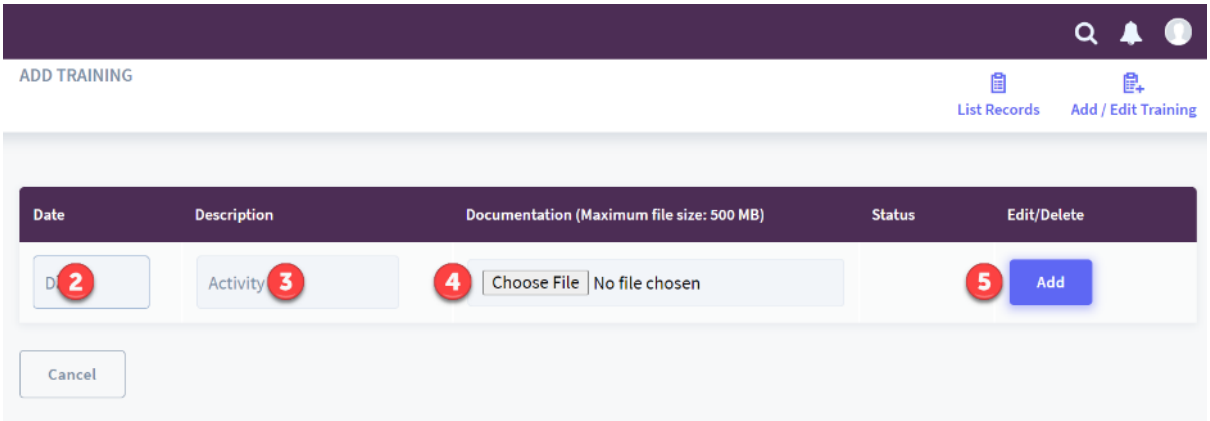
8.5.1 Adding an External Training Course for Review

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

1. Click 'Add / edit training'

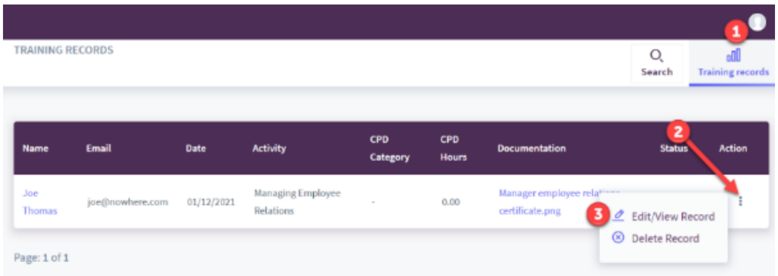


2. Edit the date when the training was completed
3. Enter a description of the training
4. Upload a document relevant to the training. This field is mandatory
5. Click 'Add'

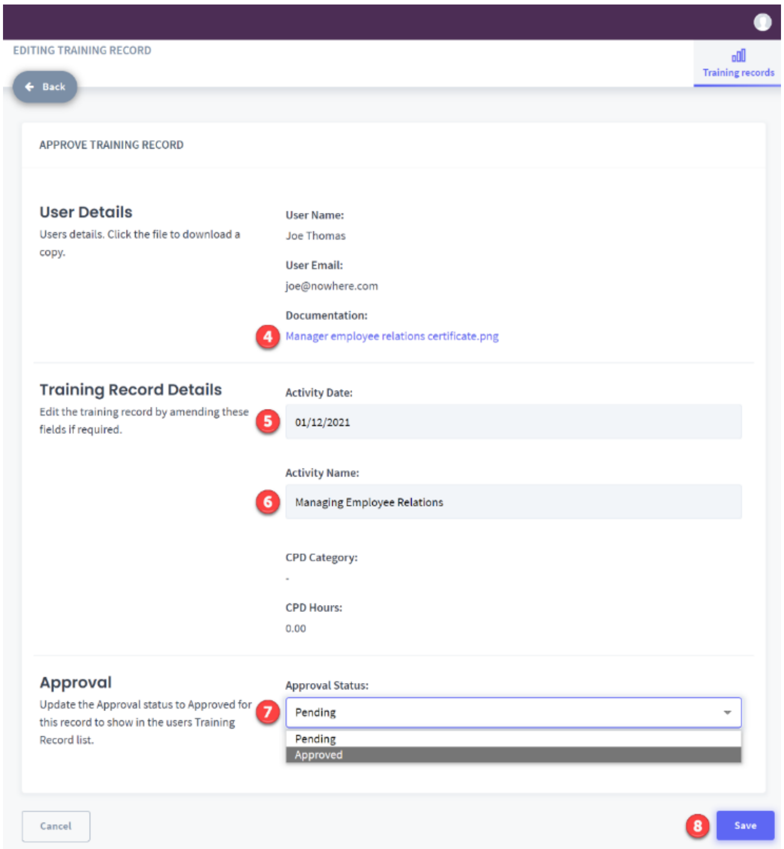


8.5.2 Accepting Training Records

1. Click 'Training Records'
2. Click on the hamburger icon
3. Click 'Edit / view record'



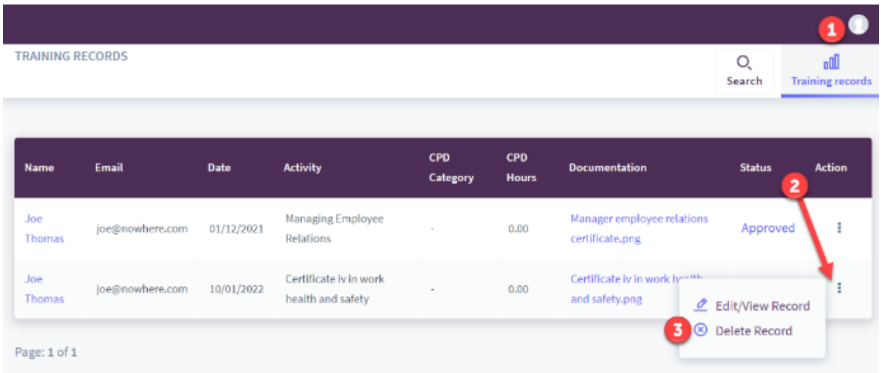
4. Click the link to download documentation for review
5. Edit the activity date (if required) by clicking in the text box
6. Edit the activity name (if required) by clicking in the text box
7. To approve the training record, click in the drop-down box and select 'Approved'
8. Click 'Save' to save changes



When the worker clicks 'Add / edit training' they can see that their training record has been approved.

8.5.3 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 user's portal



8.6 User Accounts

This feature allows you to create users at 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.

Administrators

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.

Managers

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.

Employees/Learners

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.

Candidates

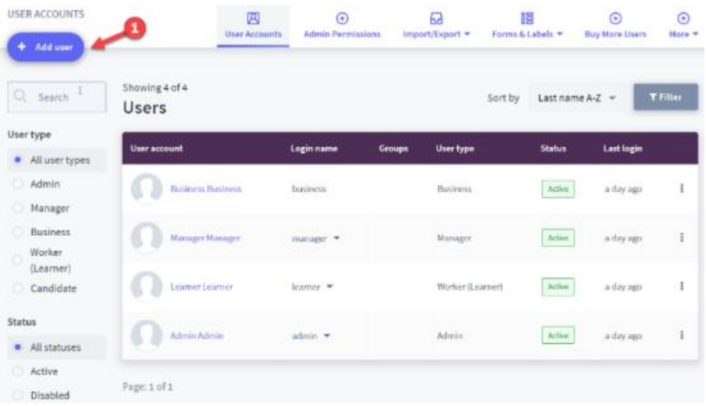
A Candidate user is only created automatically when they apply for a job within the Recruitment Module and are in the phase of being screened for suitability by management. Once successful, this user is transitioned automatically into a learner user license.

User Creation Tip

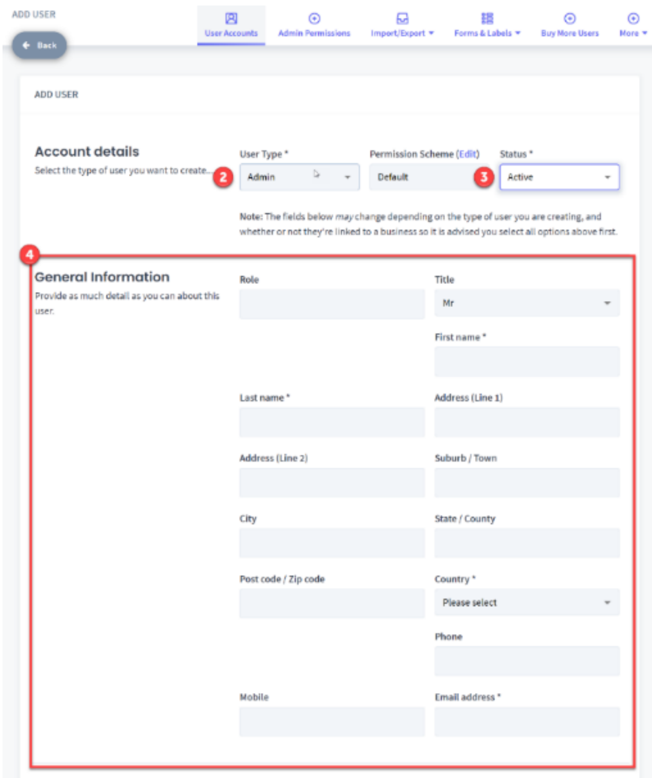
For bulk upload of user types, this can be done by ensuring all relative fields are replicated and pre-filled in a CSV spreadsheet ready for upload. If you are choosing to bulk upload 20 users or more, you are permitted to send the spreadsheet to our Support Team for uploading.

8.6.1 Add a User Account

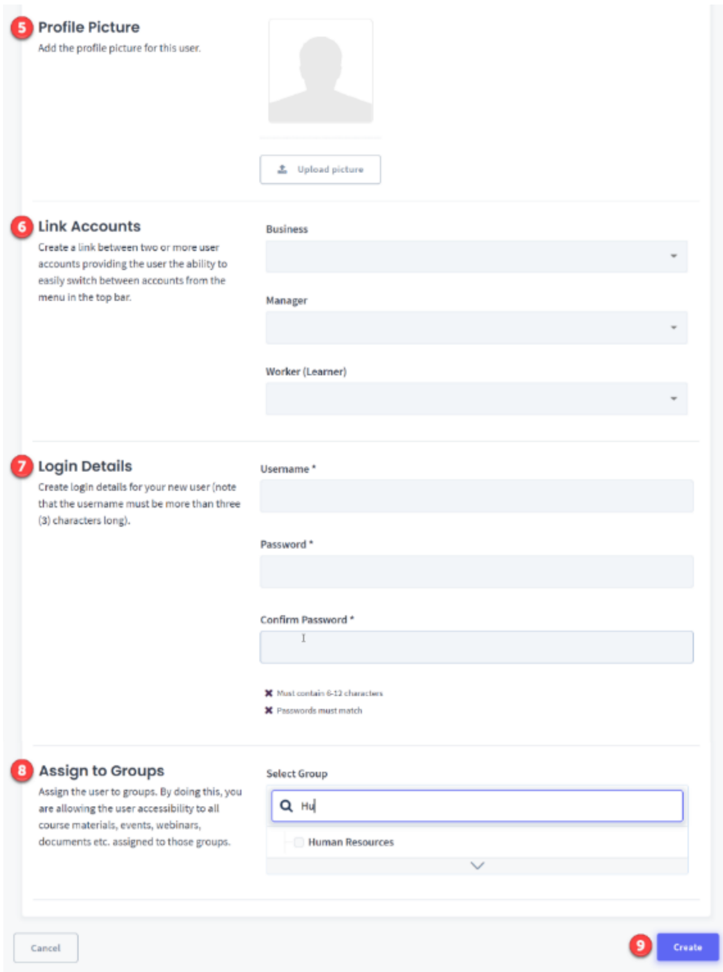
1. Click 'Add User'



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).

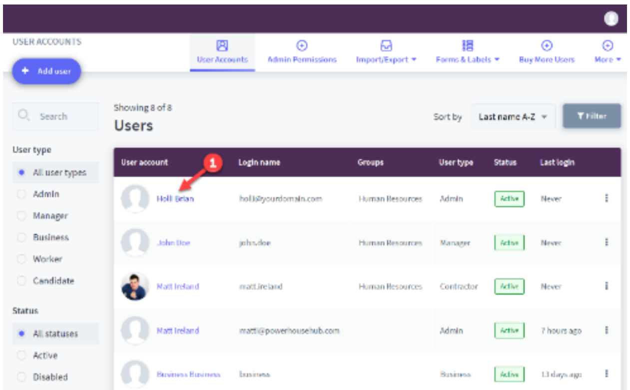


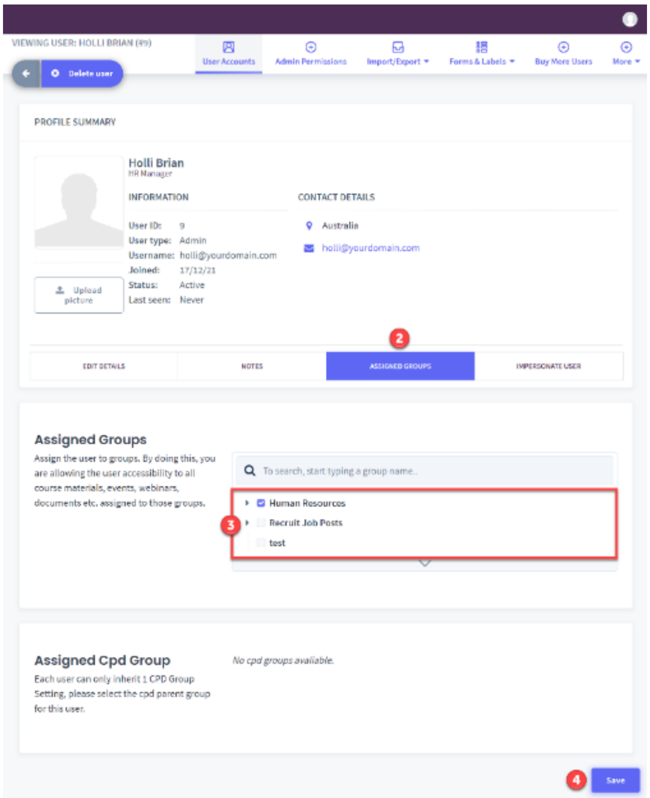
5. You have the option to upload a profile picture
6. Create a link between two or more user accounts providing the user the ability to easily switch between accounts from the menu in the top bar
7. Create login details for your new user (note that the password must be more than 6-12 characters)
8. Assign 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'



8.6.2 Assigning User Groups

1. Click on a user from the User Accounts page

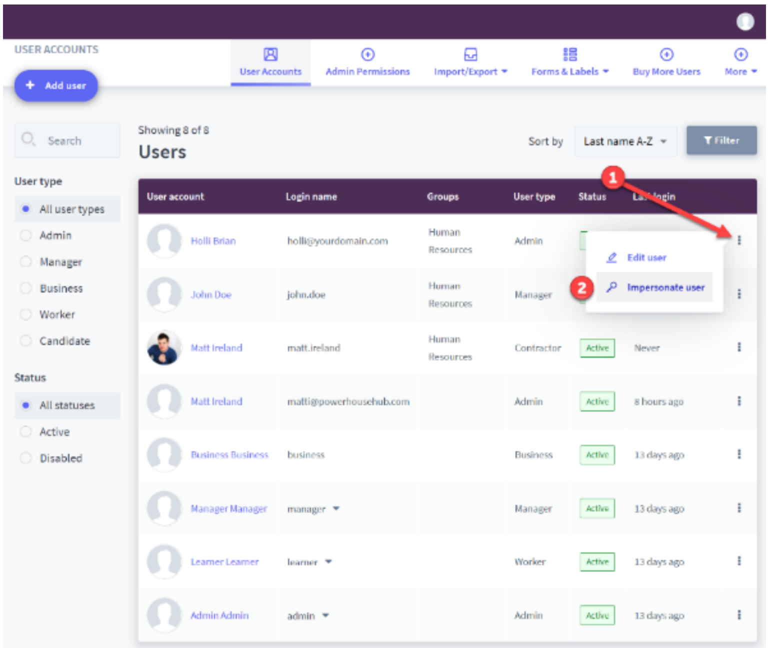




2. Click 'Assigned Groups' within the Profile Summary.
3. Select the relevant groups/subgroups you wish to assign or unassign to the user. By assigning groups to your user account, you are giving the user access to all courses, news, webinars, documentation, and events within that group
4. Click 'Save'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

8.6.3 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 sees. 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.

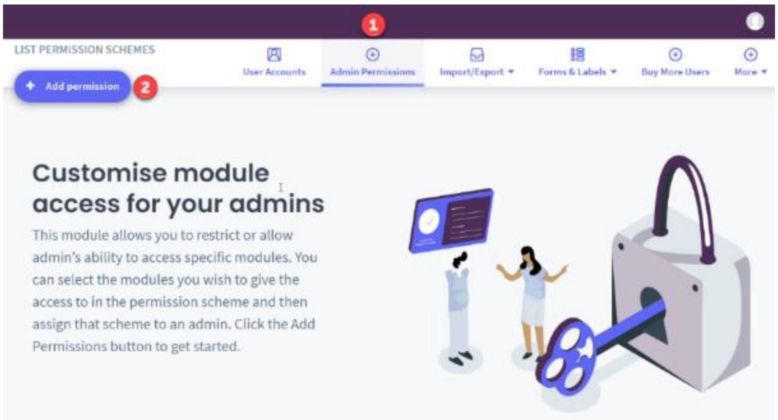


8.6.4 Admin Permissions

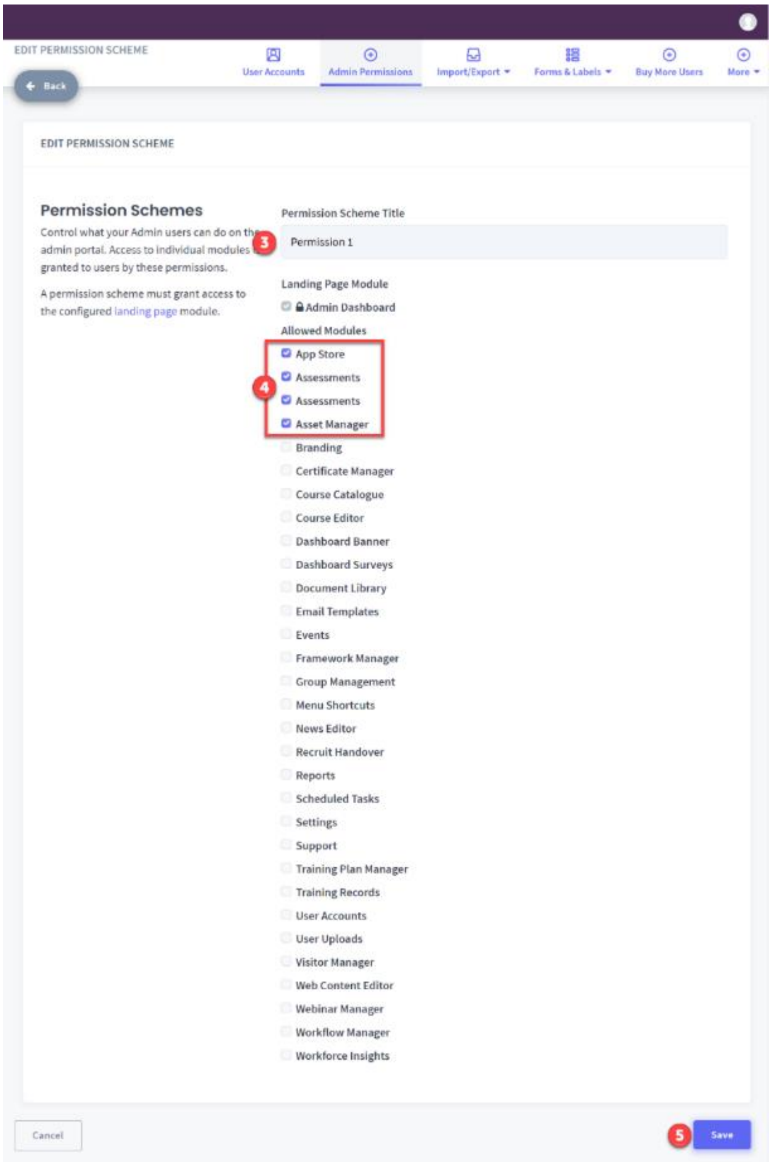
This module allows you to restrict or allow admin's ability to access specific modules in the left-hand navigation. You can select the modules you wish to give the access to in the permission scheme and then assign that scheme to an admin.

Click the ‘Add Permissions’ button to get started

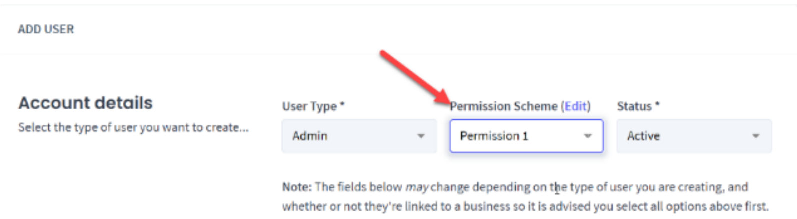
1. Click the ‘Admin Permissions’ tab
2. Click ‘Add permission’



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



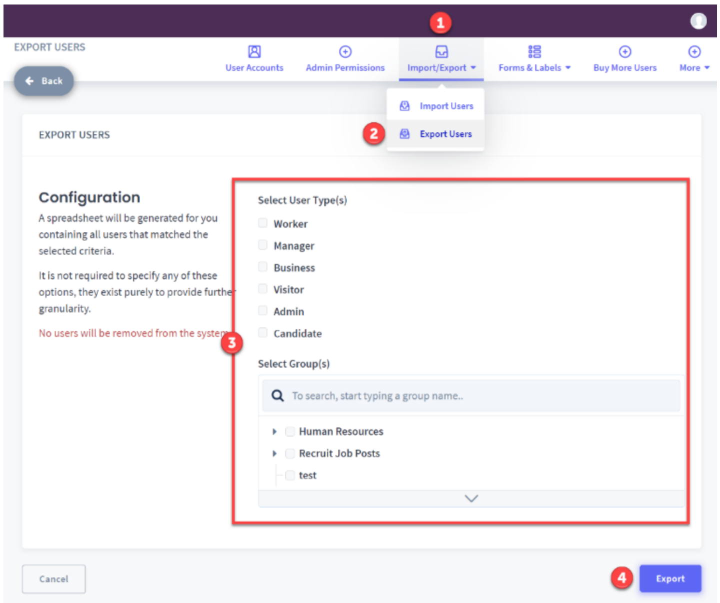
The permission scheme you just created can be assigned when adding an admin user type (shown in the image below).



8.6.5 Import Users

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

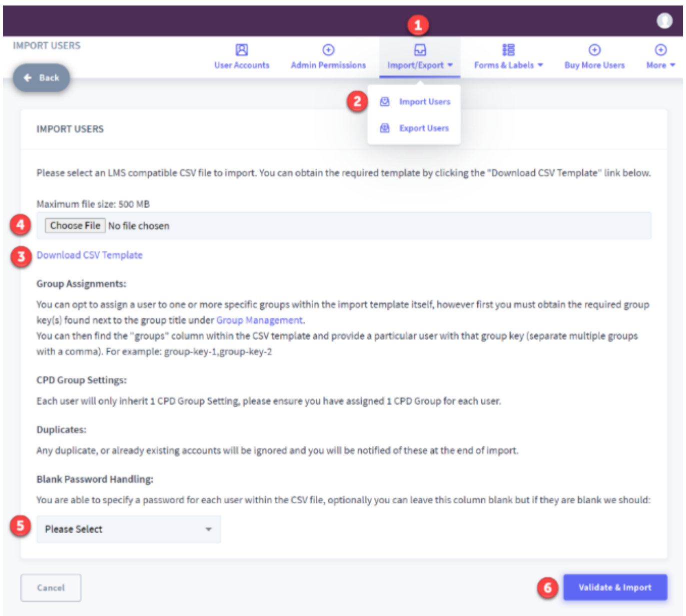
1. Click the 'Import/Export' drop-down box in the top menu panel
2. Click 'Import Users'
3. Download CSV Template and fill out the form with all user information
4. Upload completed CSV
5. If you haven't added a password for each user in the CSV, select an option from the drop-down box
6. Click 'Validate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



8.6.6 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.

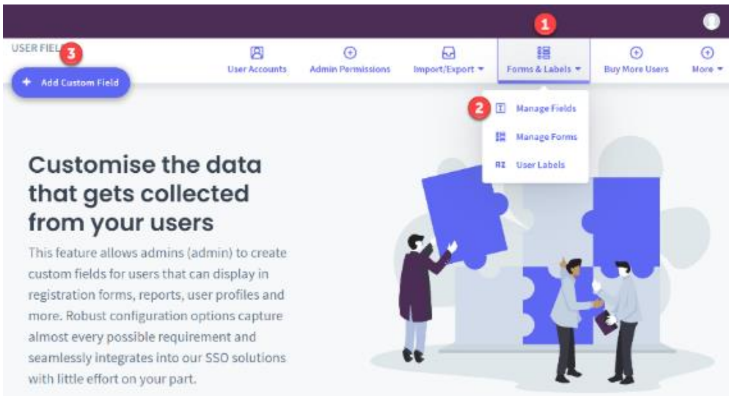
1. Click 'Import/Export'
2. Click 'Export Users' from the drop-down box
3. Select the relevant user type(s) and group(s) that they are associated with
4. Click 'Export'



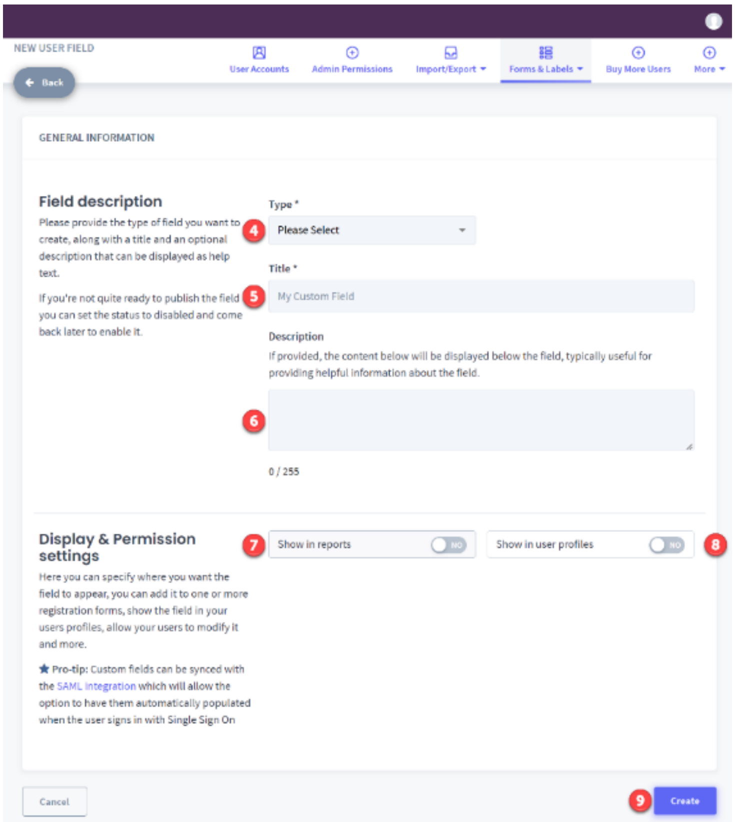
8.6.7 Manage Custom Fields

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, requiring little effort on your part.

1. Click ‘Forms & Labels’
2. Click ‘Manage Custom Fields’ from the drop-down box
3. Select ‘Add Field’



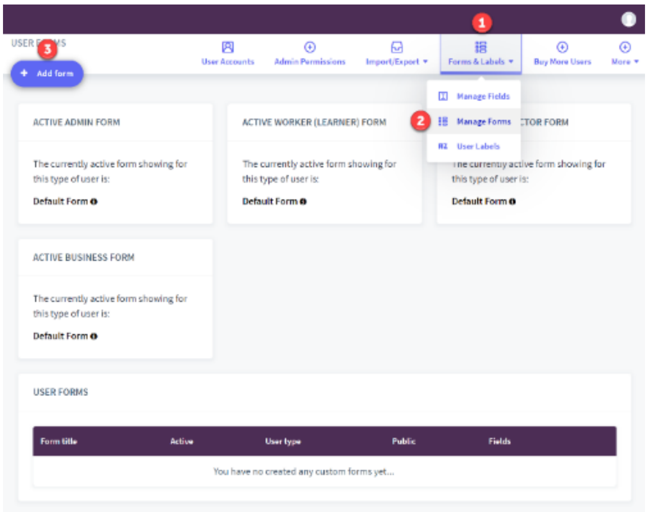
4. Select the type of field you want to create
5. Give the field a name
6. Add a description
7. Toggle Yes if you would like the fields to be included in reports that are created
8. Toggle Yes if you would like learners to complete the user fields under Edit Profile where they can complete these manually
9. Click ‘Create’



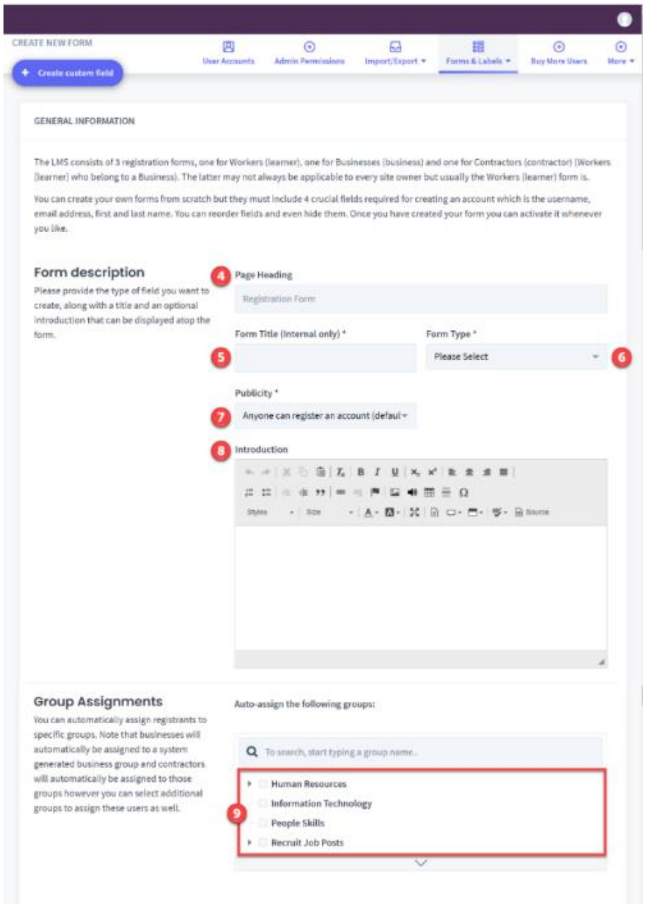
8.6.8 Manage Forms

After User Fields are created, you can 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’



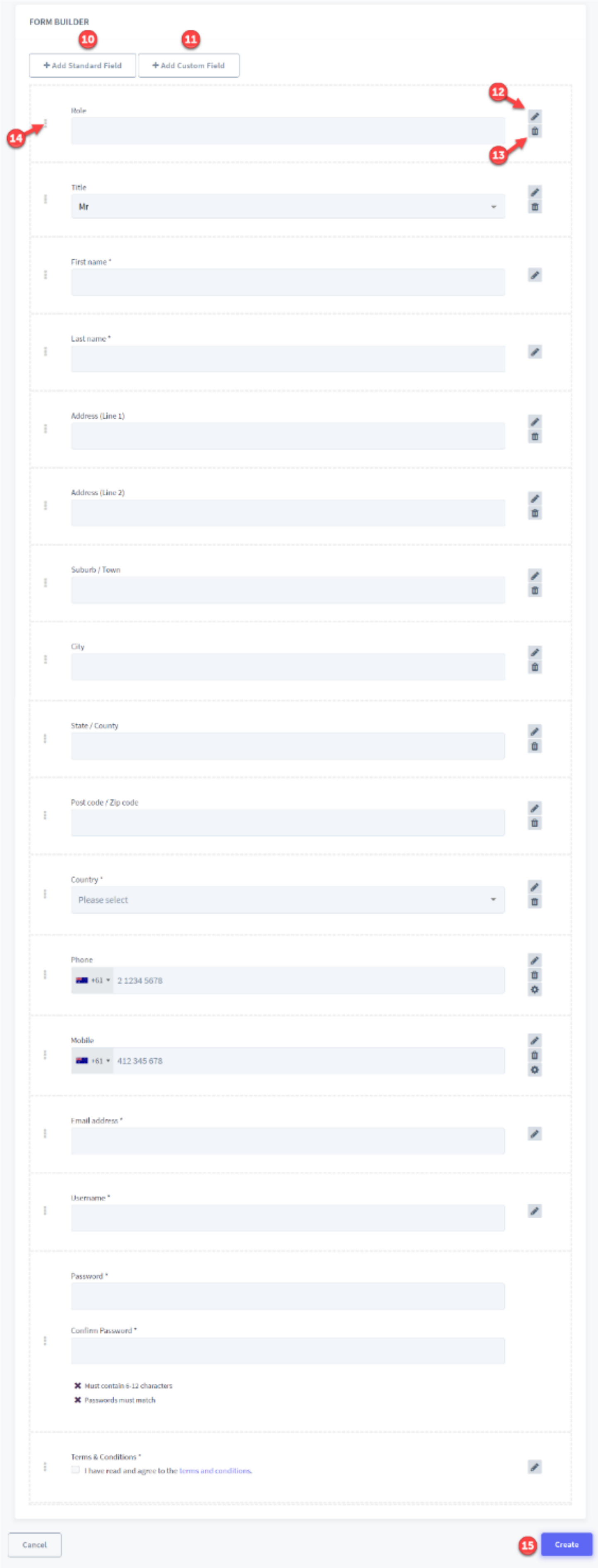
4. Add a page heading
5. Add a form title
6. Select the form type. Choose from Worker, Contractor, or Business
7. Select the ‘Publicity’ option from the drop-down box
8. Add an introduction
9. Assign the registrants to specific groups
10. Click ‘Add Standard Field’ to add a default field to your form



11. Click ‘Add Custom Field’ to add or create a custom field to your form
12. Click ‘Rename’ to change name of field

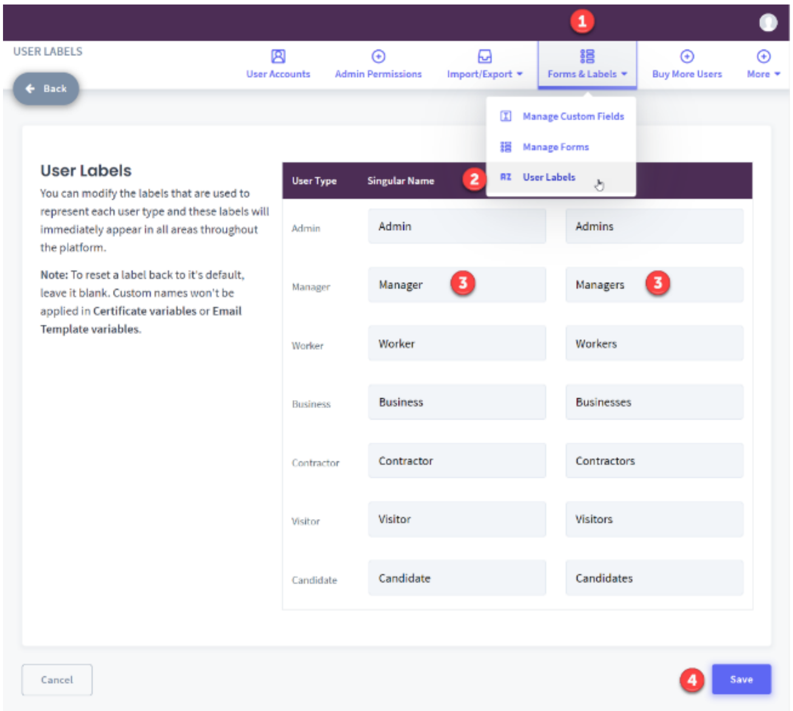
Click ‘Remove field’ to delete field from the form

13. Click and hold the hamburger icon to re-order the fields
14. Click ‘Create’ once the form is complete



8.6.9 User Labels

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

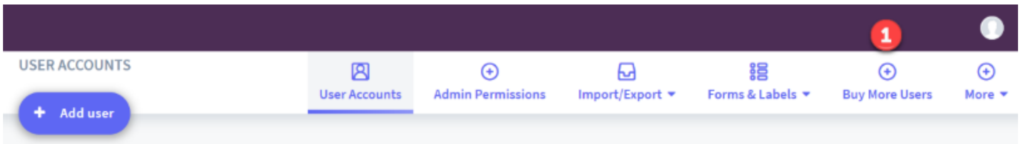


Note: To reset a label back to its default, leave it blank. Custom names won't be applied in Certificate variables or Email Template variables.

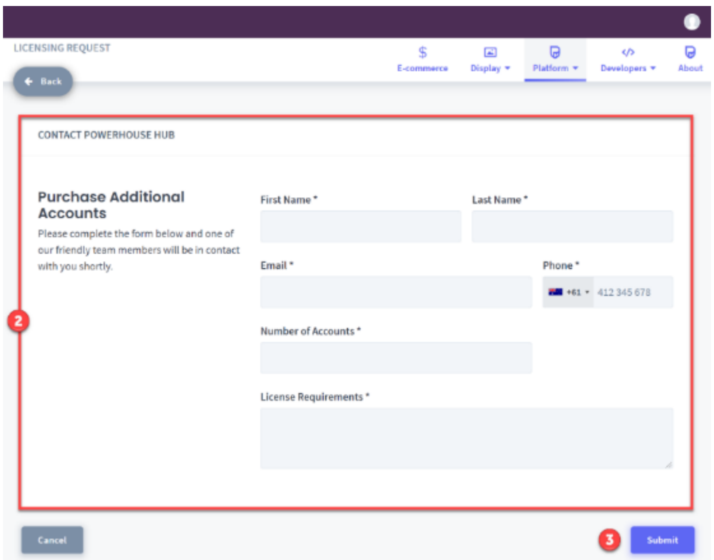
1. Click the 'Forms & Labels' drop-down box in the top menu panel
2. Click 'User Labels'
3. If you would like to change the user type label, click in 'Singular name' and 'Plural name' fields, delete current name and type desired name
4. Click 'Save' to save changes

8.6.10 Buy More Users

1. Click 'Buy More Users'



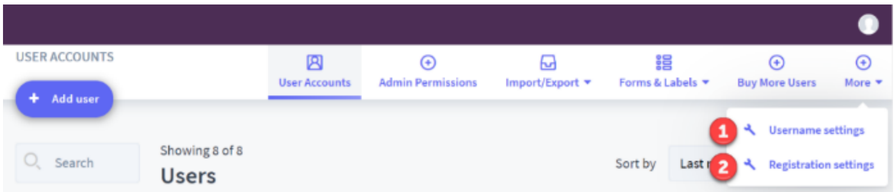
2. Fill out the form
3. Click 'Submit' and one of our friendly team members will be in contact with you shortly



8.6.11 More

1. 'Username setting' will take you to System

2. ‘Registration setting’ will take you to System

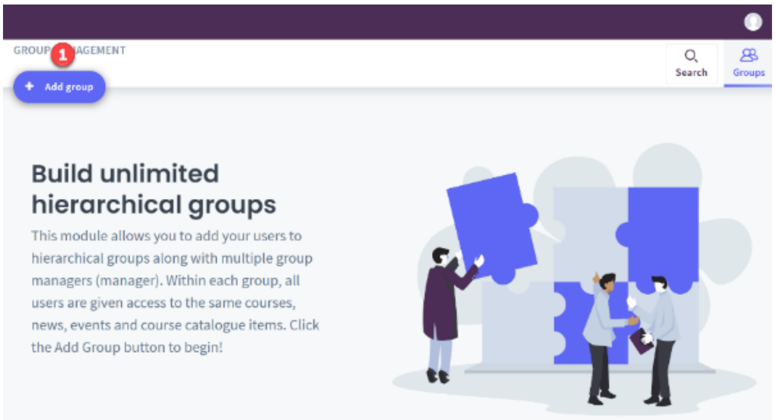


8.7 Group Management

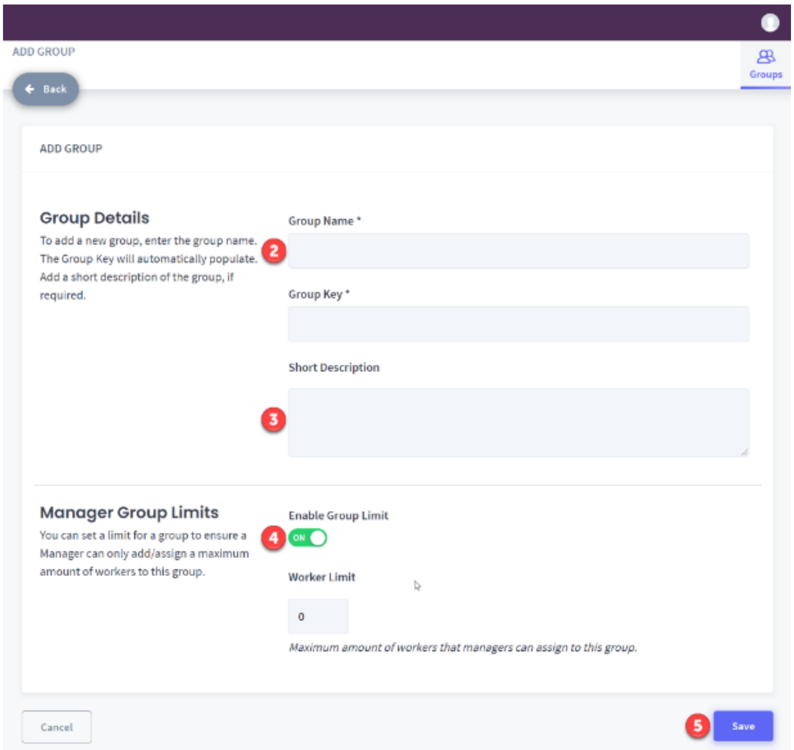
This module allows you to add your users to hierarchical groups along with multiple group managers. Within each group, all users are given access to the same courses, news, events, course catalogue items etc.

8.7.1 Adding a Group

1. Click ‘Add group’

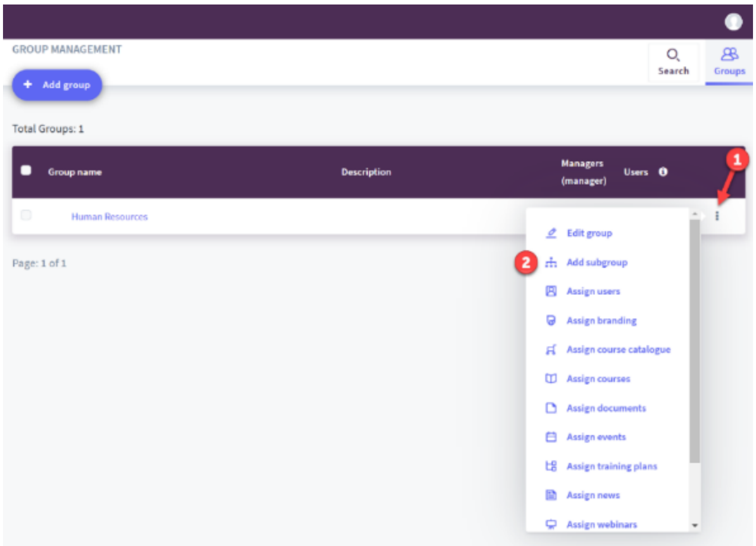


2. Add a group name and the group key will automatically populate
3. Add a short description. This is only visible to admins
4. Toggle ON to enable a group limit and then enter the maximum number of workers that managers can assign to the group
5. Click ‘Save’

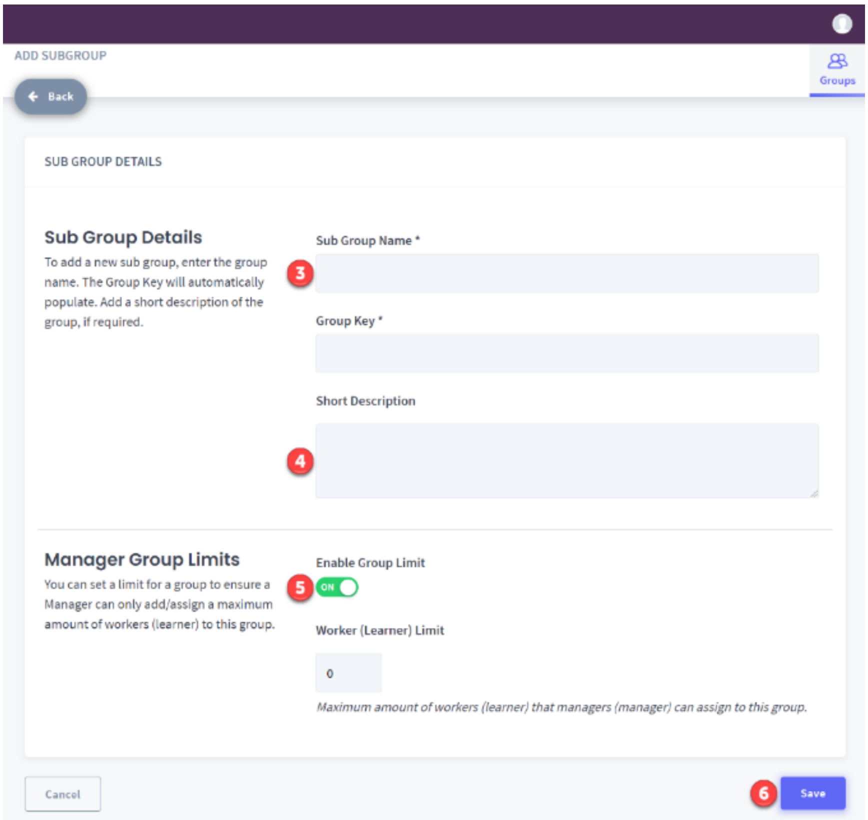


8.7.2 Adding a Subgroup

1. Click the hamburger icon
2. Click 'Add subgroup'

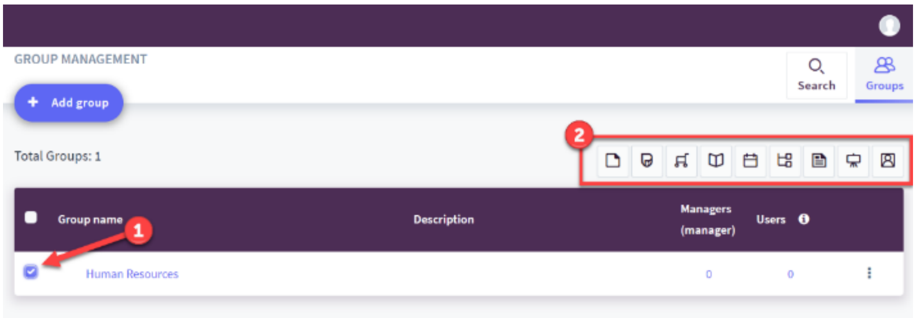


3. Add a subgroup name
4. Add a short description. This is only visible to admins
5. Toggle ON to enable a group limit and then enter the maximum number of workers that managers can assign to the group
6. Click 'Save'



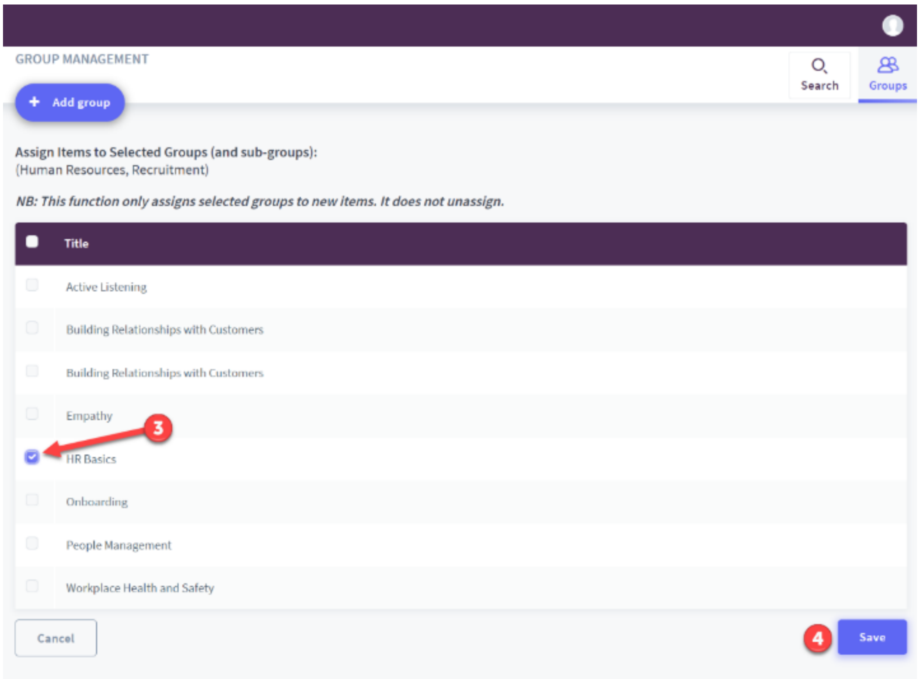
8.7.3 Assigning Assets to Groups

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



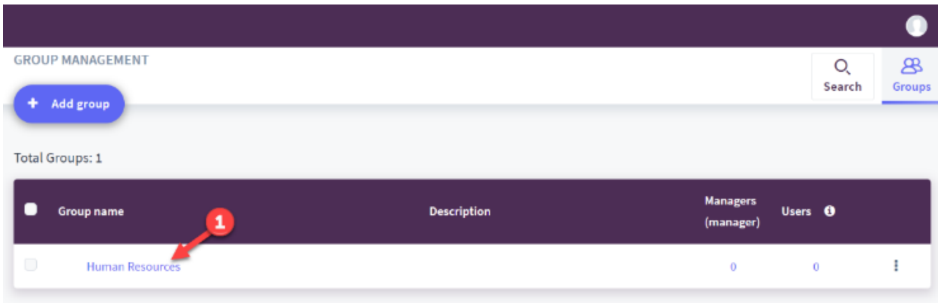
For the below example the 'Courses' asset was selected.

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



8.7.4 Edit Group

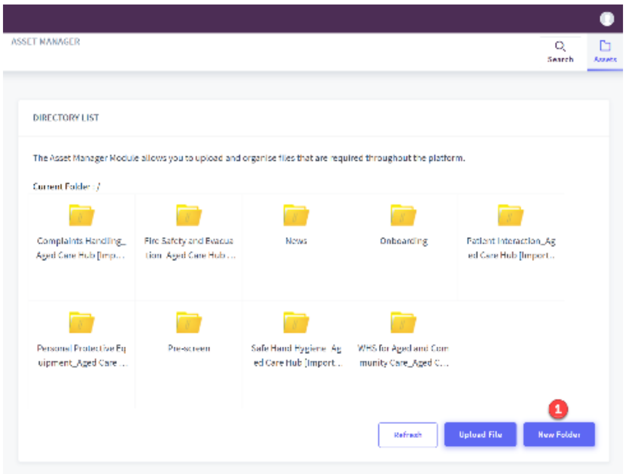
1. Click on the group name
2. Make the required changes
3. Click 'Save' to save changes



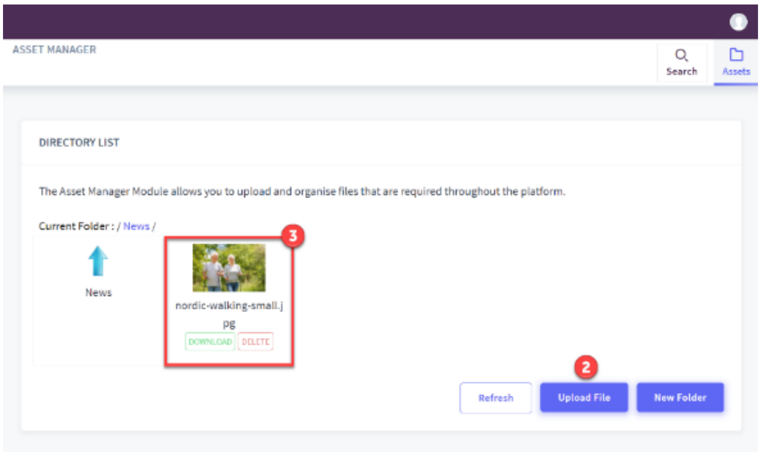
8.8 Asset Manager

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. Create a new folder

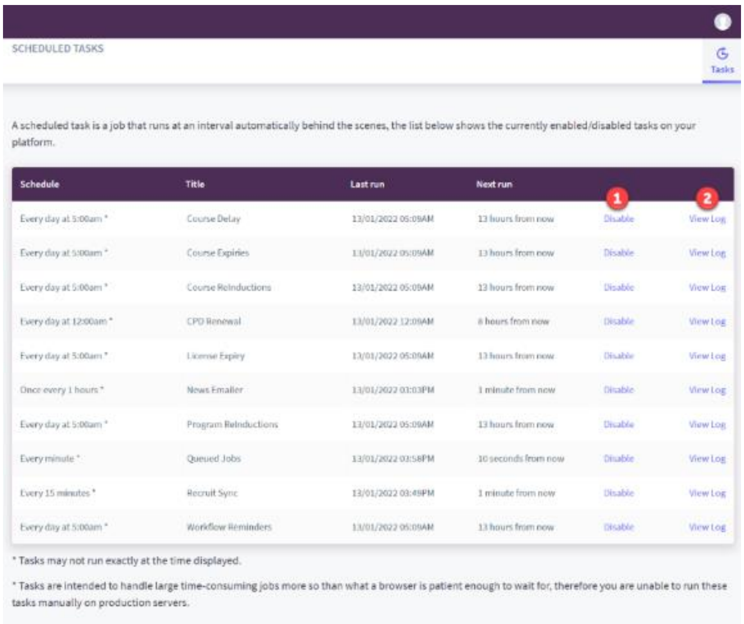


2. Click on the folder you've just created, select;'Upload File' and choose a file to upload from your hard drive
3. Once the file has been uploaded you can download or delete the file



8.9 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

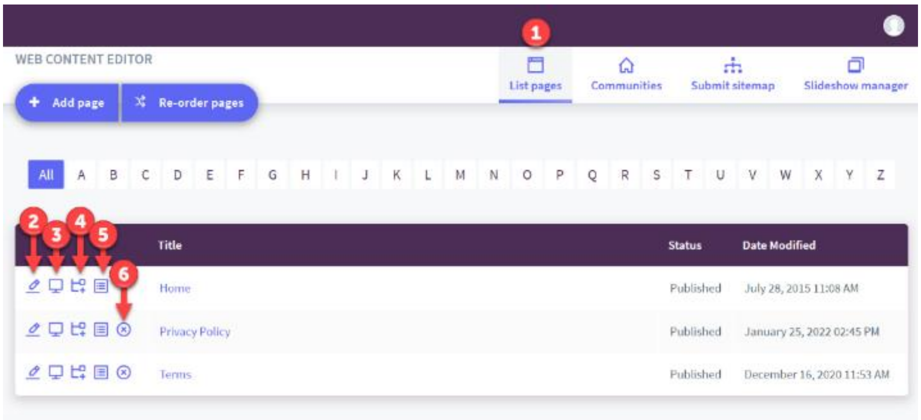
9 Platform Manager

10.1 Web Content Editor

The Web Content Editor allows you to manage, publish and edit the information displayed to customers on the public area of your training portal.

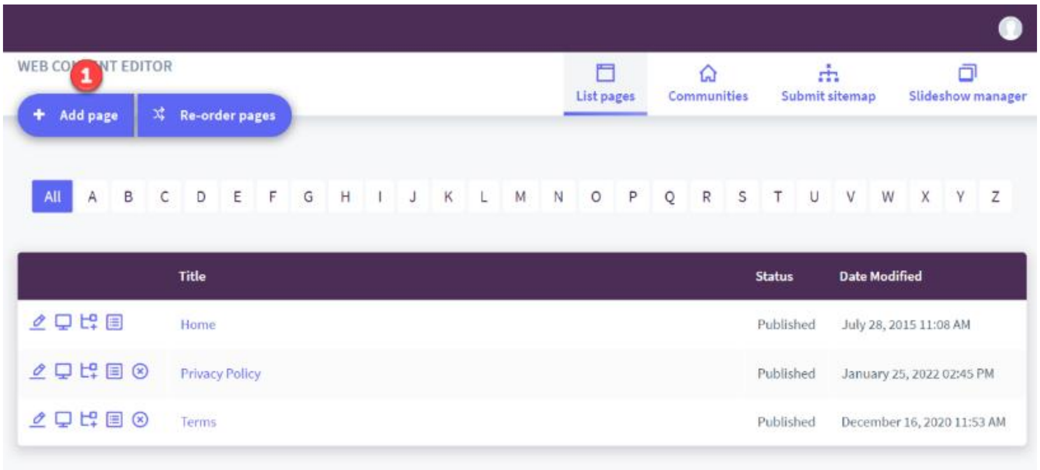
10.1.1 List Pages

1. Click the ‘List Pages’ tab
2. ‘Edit Page Detail’ – This will open your page content in an editor which allows you to edit your page content and apply styling
3. ‘View Page Content’ – This will open the content page so you can preview how the page looks in the frontend with all the styling elements applied to it
4. ‘Add Sub Page’ – This feature will allow you to add a subpage which will be displayed in both the backend and fronted of your site. Adding a subpage to a top menu page will automatically add a link to a dropdown feature in the frontend
5. ‘View Page Archives’ – This will open a list of archived versions of the selected page. You can also use this feature to save a copy of an old version of your page before making any changes to it. To do this simply go into your archived pages and click the ‘Duplicate’ button
6. ‘Delete this page’

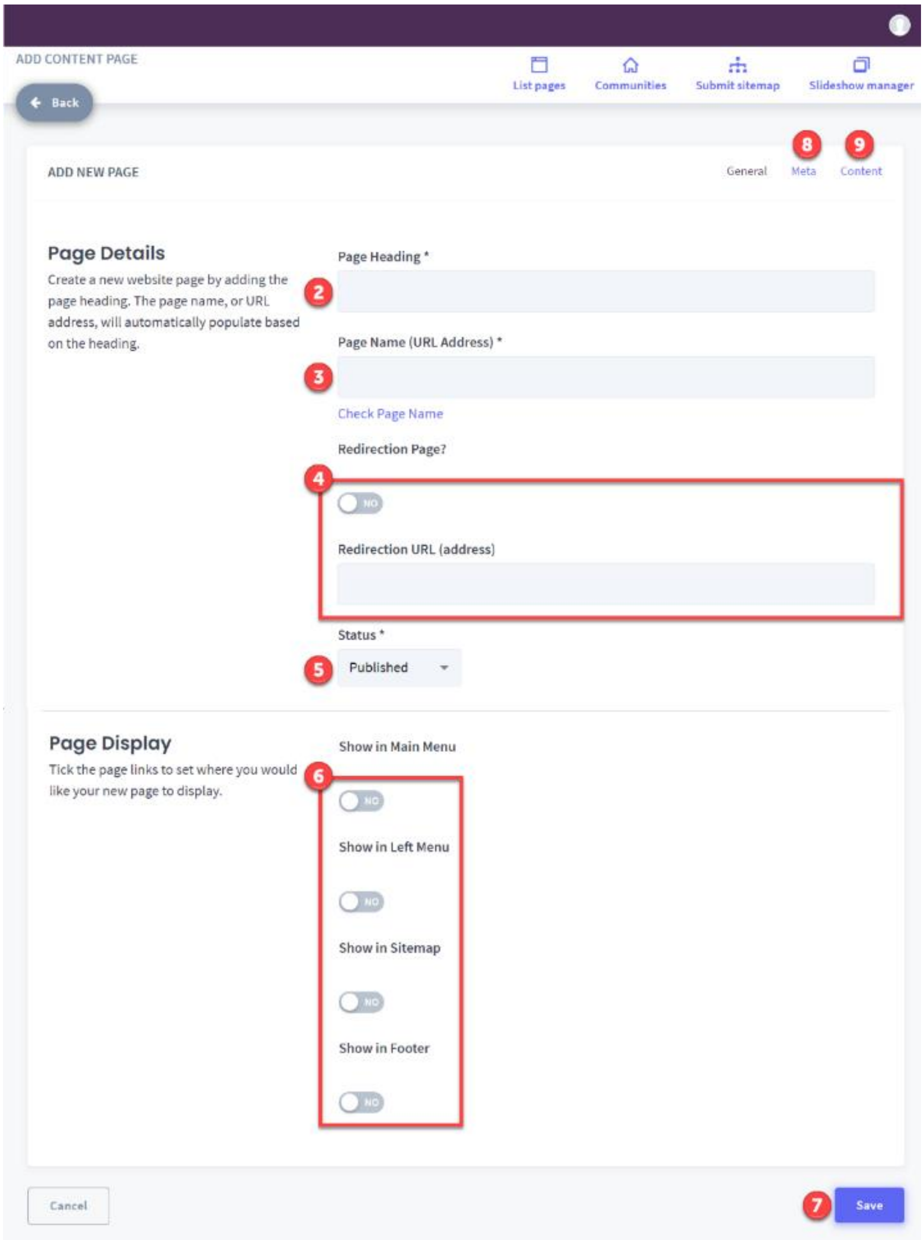


10.1.1.1 Adding a new page

1. Click ‘Add page’



2. Add a page heading
3. Type the URL of the page
4. Toggle YES and add a redirection URL if you want the page to redirect to an existing webpage
5. Set the status. Published means the page can be viewed on the frontend. Draft means the page won't be seen on the frontend.
6. Set where you want the page to display by toggling YES in desired locations
7. Click 'Save'



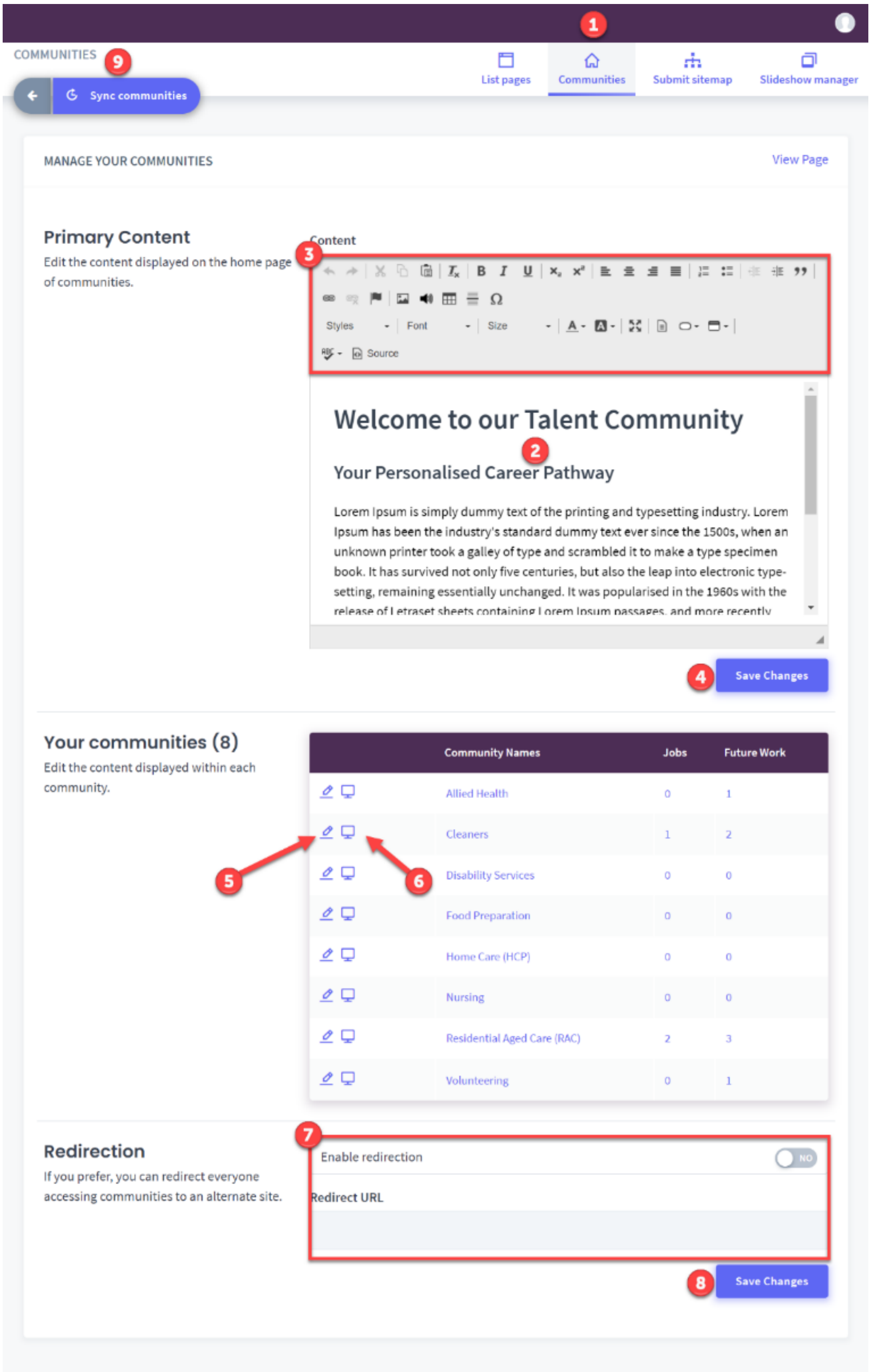
Once you have finished you can add meta and content to the page

8. Click the 'Meta link' to add meta keywords and meta description
9. Click the 'Content' link to populate the page content

10.1.2 Communities

The communities tab will only be present if you have the Recruitment Module enabled.

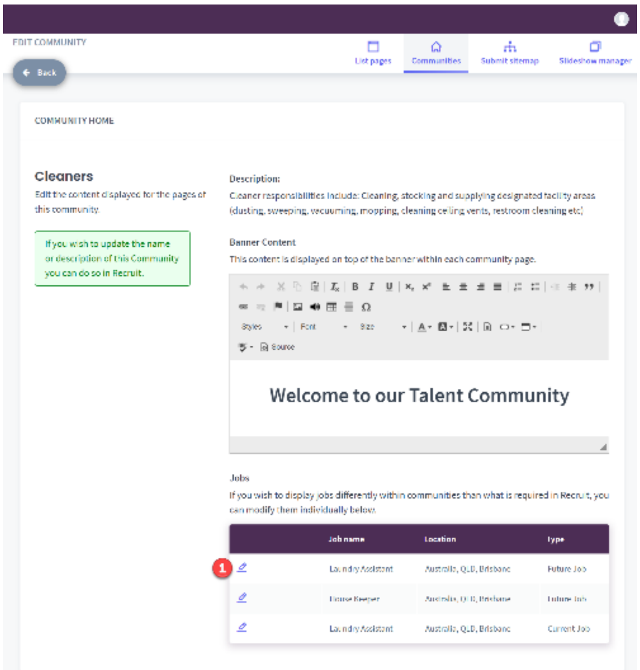
1. Click the 'Communities' tab to go to the home page
2. Click in the CK Editor to edit the introduction text
3. You can use the styling buttons (if required) to fully personalise the introduction text
4. Click 'Save Changes'
5. Click the 'Edit' icon to edit an individual community
6. Click the 'View page' icon to view the frontend of the community
7. Toggle Yes to enable a redirection and type in the redirection URL (if required)
8. Click 'Save Changes'
9. Click 'Sync communities' to update all changes on the frontend



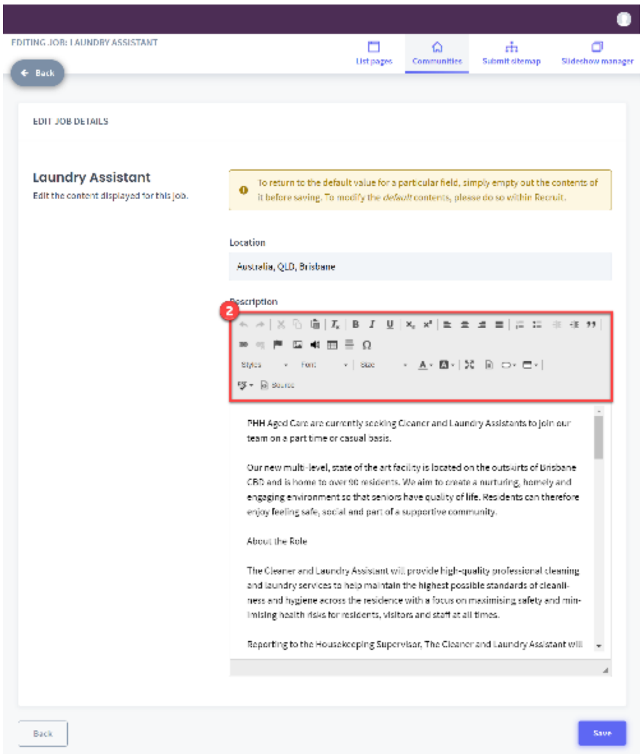
10.1.2.1 Styling a Job Post

Click the ‘Edit’ icon in step 5 of Web Content Editor (above) to be taken to a specific Community.

1. Click on the ‘Edit’ icon next to the job post that you would like to style



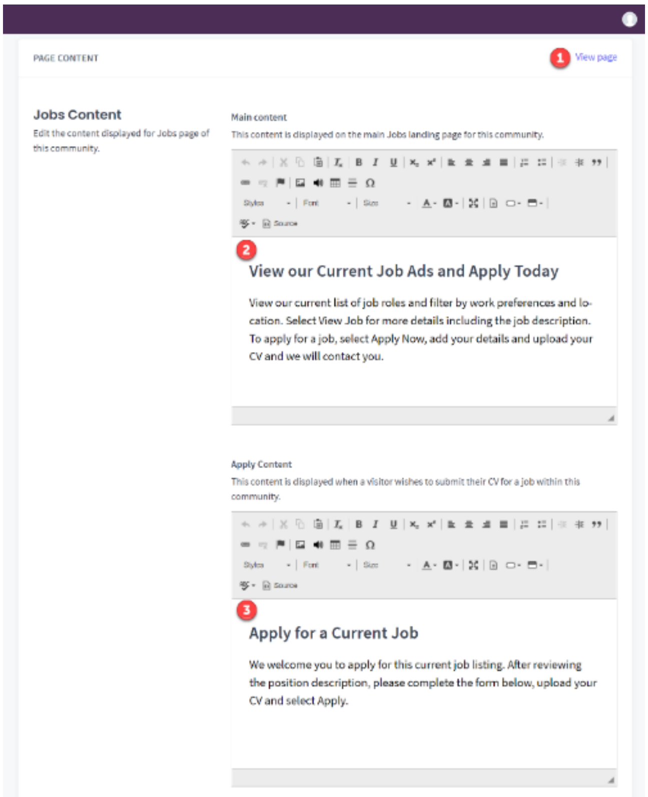
2. Use the CK Editor to change the styling of the copy, add pictures and more



10.1.2.2 Editing Jobs Content

On this page, you can edit the content displayed for the 'jobs' page of this Community.

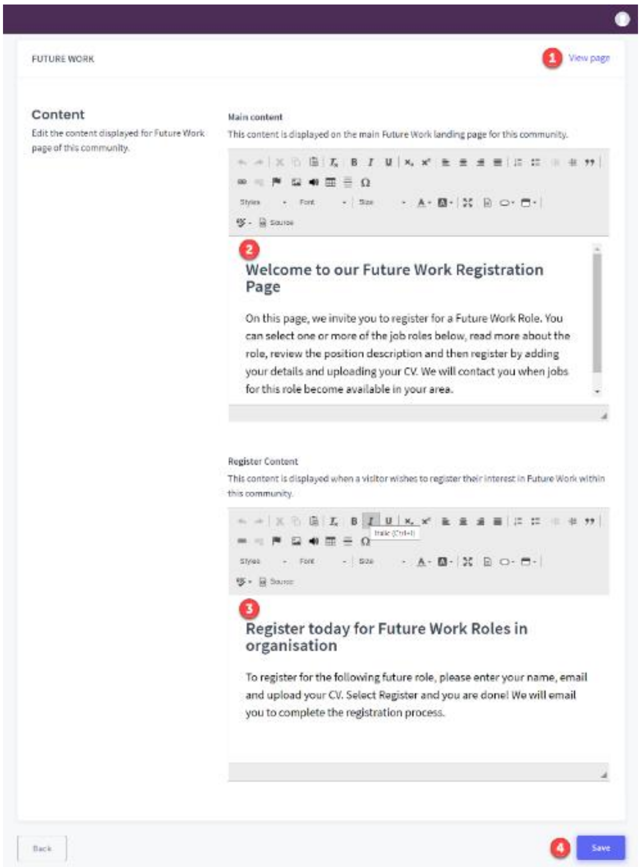
1. Click 'View page' to be taken to the page you are editing
2. Click the box (use the CK Editor if necessary) to change the content that is displayed on the main jobs landing page for this Community
3. Click the box (use the CK Editor if necessary) to change the content that is displayed when a visitor submits their CV for a job within this Community



10.1.2.3 Editing Future Work Content

On this page, you can edit the content displayed for Future Work postings for this Community

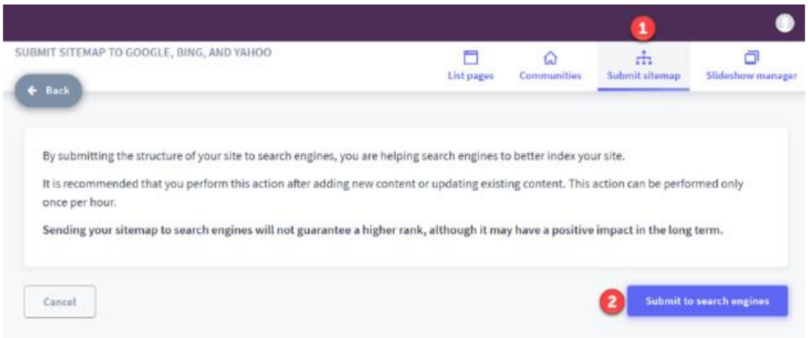
1. Click 'View page' to be taken to the page you are editing
2. Click the box (use the CK Editor if necessary) to change the content that is displayed on the main future work landing page for this Community
3. Click the box (use the CK editor if necessary) to change the content that is displayed when a visitor wishes to register their interest for future work within this Community
4. Click 'Save' to save changes



10.1.3 Submit Sitemap

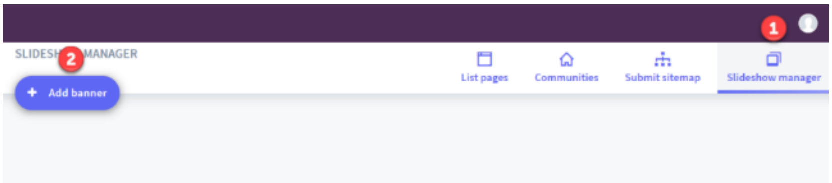
By submitting the structure of your site to search engines you are indexing it in a better way. It is recommended that you perform this action after adding new content or updating existing content. This action can be performed only once per hour. Sending your sitemap to the search engines will not guarantee a higher ranking on the search results, although it might have a positive impact in the long term.

1. Click the 'Submit sitemap' tab
2. Click 'Submit to search engines'



10.1.4 Slideshow Manager

1. Click on the 'Slideshow manager' tab
2. Click 'Add banner'



3. Toggle ON to enable banner
4. Add a banner title
5. Toggle ON if you want to show the banner title
6. Click choose file to upload your banner image
7. Add a banner caption if required
8. Set the banner title or banner caption font colour
9. Add a banner link if required
10. Set the banner duration
11. Toggle ON to show banner layer
12. Click 'Save' to save changes