



V.7.3 – 009a

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# 1. The Site Administration Portal

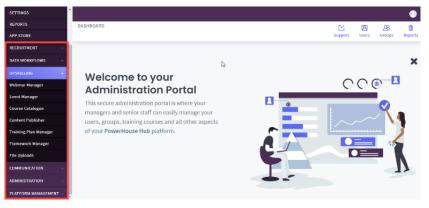
The Site Administration Portal manages the settings, modules, groups, users and permissions. You are provided with a Site Administrator account to manage this portal and your administrator may set up additional administrators with specific permissions. The log-in page is central for all users, yet once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

PowerHouse Hub	Home	Privacy Policy	Terms
			<b>PowerHouse</b>
		LOGI	_
		0	Username Type username
		6	Password Type password
			Forgot Username/Password?
		3	login

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:

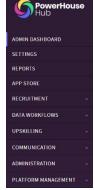
# 1.1.1 Dashboard

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.

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## 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.

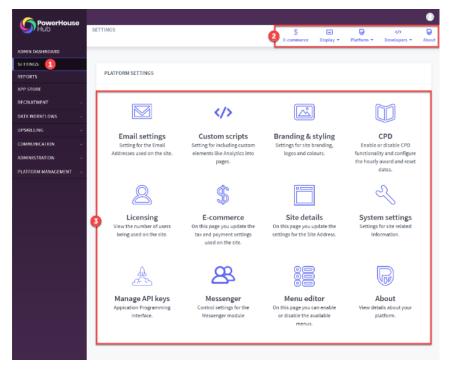
#### 1.1.10 Platform Management

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

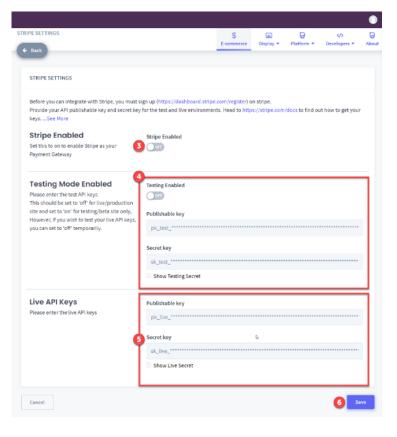
The E-commerce section allows you to update the tax, invoices and ecommerce payments settings used on the site.

# 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

						٠
PAYMENT SETTINGS		\$		D	\$	D
🗲 Back		E-commerce	Display 👻	Platform 🔻	Developers 🔻	About
PAYMENT GATEWAYS						
Below are the payment gateways we offer as sta	indard to integrate with. Click o	on the configur	e button to ado	d your credenti	als to get started	
PayPal Configure	stripe Stripe					

- 3. When toggled ON, Stripe will be set as your payment gateway
- 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
- 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

PAYMENT SETTINGS

- 5. Type in tax text (GST, VAT etc.)
- 6. Type in the tax percentage

Tax Settings 🚺	Business Number				
Add a Business Number (eg: ABN, GST Number, CRN, Companies House Number	I				
etc) to show on any invoices produced by the portal.	Business Number Label (to a	appear on all invoic	es):		
Customise the currency and currency symbol that will apply to all eCommerce items on the	eg: ABN, GST Number, CRN	, Companies House	Number etc		
site.	Payment Currency			Currency	
Assign and customise a tax percentage that will be applicable to all purchases made on	Australian dollar (AUD)		*	Symbol	
this site.				S	
4	Include Tax on Purchases	Tax Text		Tax Percentag	
_	OFF 5	GST	6	10 %	
		You can enter a te name for your tax etc.			

# 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

Alternative Login Page		Display the eCom	merce login panel in different areas:	
Adjust the eCommerce login panel.	1	Default (In the M	iddle)	*
			merce items in the order of: drag and drop each item into the order you desire.	
	2-	1	Coursecarl	
		:	Events	
		1	Webinars	

# 2.1.4 Frontend Course Catalogue

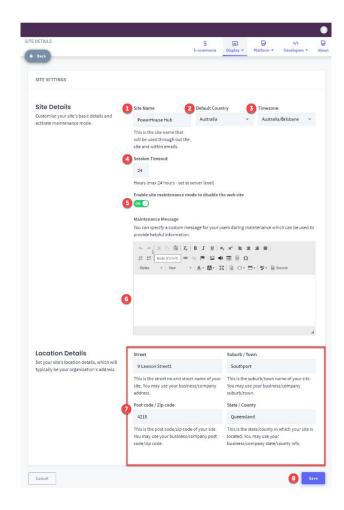
- 1. Toggle ON if you would like items to be categories
- 2. Toggle ON to allow users who are not part of the platform can register to events as external attendees
- 3. Select how many events show on the homepage
- 4. Select how many courses show on the home page
- 5. Select how many webinars show on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

Frontend Catalogue	Categorise items in categories	NO
Also configure how many items show on the homepage.	Allow free events to be registered on the frontend (Users will be registered as external attendees)	NO
	How many Events should show on the homepage:	
Ð	4 The state of the	
0	4 V	
	How many Webinars should show on the homepage:	
6	4 👻	
Cancel	(	5 Save

# 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

NDING & STYLING		\$		Ø	\$2	0
Back	E-co	mmerce	Display 👻	Platform *	Developers *	Abou
COLOURS AND STYLE SETTINGS						
		b.				
Logos / Images Ensure all images are the correct size and format. Each image upload section includes recommended dimension specifications for you to follow.	Default Logo Shown to frontend pages outside of (Height: 100px; Width: 200-300px, I View Current View Current	Max Size:				
Note: The smallest possible file size that you can achieve is recommended. Large images can consume mobile-data/bandwidth quickly and may take longer to load. The maximum recommended file sizes provided are considered to be very generous.	Logo With Inverted Colours Shown on left menu at the top whe (Height: 50px; Width: 100-150px; M View Current Change	ax Size: 5				
	Placeholder Image A default image shown for each ite (Height: 500px; Width: 500px, Max View Current Change	Size: 500		that do not ha	ve their own imaj	ge.
	Homepage Logo Shown only on the login pages. (Height: 150px; Width: 300-450px, I View Current Change		500KB)			
	Homepage Background Shown only on the login pages. (Height: 1024px; Wildth: 1600px; Mi View Current Change		1B) eset			
	Browser Icon Shown in the browser tab or saved (Height: 64px; Width: 64px, Max Siz View Current Change	e: 500KB				
	Onboarding Background Shown only on the onboarder's pa (Height: 1024px; Width: 1600px, Mi		(B)			

#### 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

Customise the colours on the portal to match your brand.	Slate Purple	Orange	Green	Red	
your brand.					
	Primary	Accent			
	5	6			
	CURRENT: #4C2D55	CURRENT: V5E67F3			
	DEFINIET: #4C2D55	DEFAULT: #5E67F3			
	Reset colours to default				
	Reset colours				

## 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.

- Select the user tab you would you like to change
- 2. To reorder modules, click on the hamburger icon and drag into position
- 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

ise					
	MENU EDITOR	_		S 🗷 🕞	s/> Developers =
	+ + A463	loricat			
	MENU MANAG			Worker Hanager Business Visitor	
	MENU MARAG	EN .		Writer Hanger Desitess Worker	ANTI CANDOR
	Reorder menu	items and set your landing page for Work	er Accounts.		
	The menu title	is without stars will be applied to only the	left hand menu items.		
		Rem name	Hern URL	Landing	Order
	2	Dashboard	Jdanhboard	0	🗲
	2	training Record	/transground		=
	2 *	Course	jenarne	3	-
	<b>*</b>	Buy Course	/counterant		=
	2.*	Training Plan	Anamingprograms		=
		Event	Jevents.		=
	.∠ ★	Wobin ar	Juebrum		=
	2	Workflows	jonboard		=
~	a 4 1	News	Jervis		=
-	2	Document	Adecuments		=
	2	Messenger	/incossinger/laturears.Jatmossinger		=
	2	Link	Ania		

# 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.

Back		S E-commerce	E Display =	Platform *	<>> Developers =	
INCLUDES						
The settings below are for advanced users only additional functionality etc.	You can add links to C	55 stylesheets and Javasc	ript files to cu	stomise fonts a	nd provide	
Additionally you can also add Google Analytics users, including their operating system, the bro information beneficial to site owners.						
To discover more of what Google Analytics can	offer, be sure to checko	out this crash course provi	ded by Google	e: Google Analy	tics for Beginners.	
Scripts Before	Script					
Include any necessary code that is required before the <head> tag here.</head>	I					
Scripts After <body> Include any necessary code that is required after the <body> tag here.</body></body>	Script					li li
Scripts Before	Script					
before the  tag here.						4

# 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

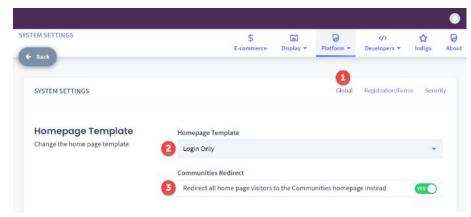
						0
MODULES	\$ E-commerce	IIII Display ▼	₽latform ▼	> Developers •	<b>☆</b> Indigo	D About
<b>G</b> Back						
WORKER (LEARNER) DASHBOARD MANAGER					Configure	
Click the Configure button to customise what your Workers (learner	r) see on their da	shboard.				
MODULE MANAGER	1 Worker (Learn	er) Manage	r Business	Visitor Admir	n Candid	ate
Enable or disable the available modules for Manager Accounts. The	default order va	ue for modul	es is 99.			
2 Module Name	3	Enabled				
Alerts						
Profile						
Framework						
Training						
Messenger						
News						
Reports		ON				
Workflows						
Cancel				4	Save	

#### 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



Force the user to use the suggested username

Allow managers to modify usernames

Allow businesses to modify usernames

Automatically generate a suggested username in "firstname.lastname" format O 100

( NG

() NO

O NO

3. Toggle recruit integration ON to redirect all home page visitors to the community homepage

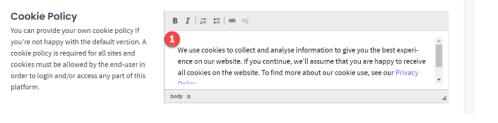
#### 2.3.2.2 Username Settings

Here you can modify the behavior of user forms

- 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.

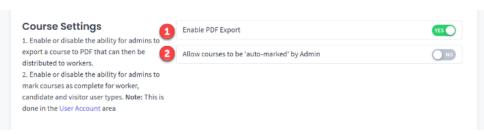


**Username Settings** 

Modify the behaviour of user forms

#### 2.3.2.4 Course Settings

- 1. Toggle ON to enable admins to export a course to PDF
- 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

Workflow Settings The following settings affect all Workflows.	Show Workflow/s on login if not completed.	NO
2	Allow users to access other modules if they haven't completed their assigned workflows.	NO

#### 2.3.2.6 Training Record

1. Toggle ON to enable or disable specific fields

Training Record	Show Reflective Journal	NO
Enable or disable specific fields by selecting		
the slider icons.		

permissions.

Global Manager Settings

The following settings affect all Manager

0

fields

Allow managers to add new worker accounts

Allow managers to register worker to events.

Allow managers to view workers CPD Overview.

Allow managers to view/edit notes saved against a user

Allow managers to assign/unassign course to workers.

Allow managers to upload files and add expiry dates for workers.

Allow managers to update a user's Workforce Wallet personal information

#### 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.

Global Business Settings The following settings affect all Business permissions.	Allow businesses (business) to enable/disable contractor accounts.	<b>ND 1</b>
Cancel		2 Save

#### 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.

YES

YES

YES

0 110

0110

0 110

0 //0

- 1. Click the 'Registration/Forms' link in the right-hand navigation
- 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
- 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

						٠
SYSTEM SETTINGS	\$ E-comm	ല erce Display ♥	Platform -	<∕> Developers ▼	<b>☆</b> Indigo	<b>O</b> About
SYSTEM SETTINGS			Global	Registration/For	ms Secur	ity
Registration Forms Enable or disable a particular user type 2	Enable Worker (Learner) F	Registrations			YES	
registration form. Note: If a form is not enabled for public	Allow public access				YES	
access here, only administrators can access it from the frontend provided they have logged into the portal first.	Enable Contractor Registr	rations			NO	
•	Allow public access				YES	
0	Enable Business Registrat	tions			NO	
•	Allow public access				YES	

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 countries

Phone Configuration	Default Country	
Control the display settings for the and "mobile" fields.	e "phone" Australia	
Preview	Preferred Countries	
<b>+61 *</b> 412 345 6	3 Australia 💉 United Kingdom (Great Britain) 🔹	
	Show dial code for selected country	YES
	5 Show examples for selected country	YES

#### 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
- Assign a maximum number of login attempts by user, along with a lockout period. For infinite attempts set to 0
- Set lockout duration. This will activate once a user has reached the maximum number of login attempts

TEM SETTINGS		\$		G	   	☆	6
Back		E-commerce	Display 🔻	Platform ▼	Developers 🔻	Indigo	Abo
_						1	
SYSTEM SETTINGS				Global	Registration/Form	s Secur	ity
Lockouts Assign a maximum number of login attempts by users, along with a lockout period.	Maximum I	ncorrect Attempts					
	For infinite a	attempts please set as	0.				
	Lockout Du	ration					
	30						

#### 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

Password Options Set the criteria for users' passwords.	Minimum Characters	
	Maximum Characters	
	3 Require an uppercase letter	NO
	4 Require a number	O NO
	5 Require a symbol	NO

#### 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

SameSite is an attribute introduced by	Set the SameSite attribute to:
Chromium that helps prevent CSRF attacks.	Lax (OK)
However, sometimes it may affect the	None (Danger)
success of some Single Sign-on	Lax (OK)
implementations and Payment Gateways so	Strict (Recommended)

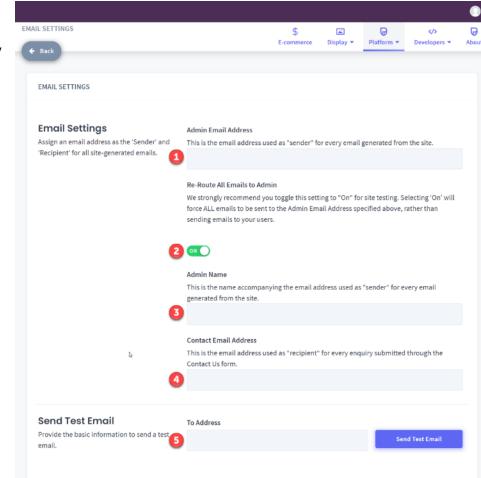
## 2.3.4.3 Copyright Protection

- 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

Copyright Protection	Enable copyright protection	NO
protection by selecting the slider icon. This prevents right clicking on course content.		
Cancel		2 Save

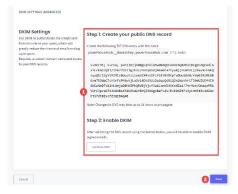
## 2.3.5 Email Settings

- Admin Email Address -This is the email address used as "sender" for every email generated from the site
- 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
- Admin Name This is the name accompanying the email address used as "sender" for every email generated from the site
- 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

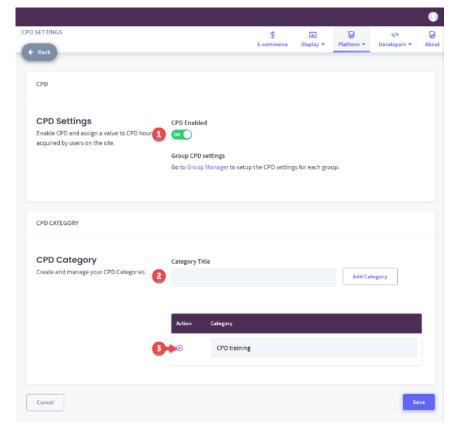
- 1. Gives you an overview of your current licenses
- To purchase more accounts, click the button

NSING Back		\$ E-commerce	III Display ▼	₽latform ◄	Developers •	Abo
LICENSING						
Current Licences This table gives you an overview of user	Purchased	Tota	l Used	Per	centage Used	
account totals and allows you to order more when needed.	100		8		8%	1
	User Type	Active	D	isabled	Total	
Г	Admin	3		0	3	٦.
	Worker	2		0	2	L
	Manager	2		0	2	Т
	Business	1		0	1	L
	Visitor	0		0	0	Т
	Candidate	0		0	0	

# 2.3.7 CPD

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

- 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)

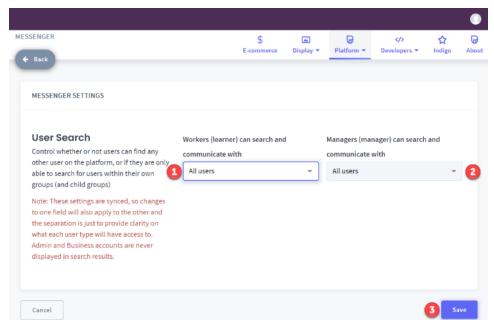
Note: These settings are synced, so changes to one field will also apply to the other and the separation is just to provide clarity on what each user type will have access to. Admin and Business accounts are never displayed in search results.

- 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



'About' provides information regarding your software.

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-commerce	Display 🔻	Platform 🔻	Developers 🔻	About					
ABOUT									
Versior	n Informo	ation							
View the ve	rsion details a	bout your platf	orm.						
Current Ve	rsion	Latest E	Build						
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	ABOUT Versior View the ve Current Ve 7.3.202112: System Tim	ABOUT	ABOUT Version Information View the version details about your platf Current Version Latest E 7.3.202112201334 20/12/2 System Timezone Australia/Brisbane Mon, 20	Back         \$       Image: Commerce Display ▼         Platform ▼       Developers ▼         ABOUT       Image: Commerce Display ▼         Version Information       Version details about your platform.         Current Version details about your platform.       Latest Build         7.3.202112201334       20/12/2021 01:34PM         System Timezone       System Time         Australia/Brisbane       Mon, 20 Dec 21 13:11:15	DUT         Back         \$       Image: Commerce Display = Platform = Developers = About         ABOUT         Version Information         View the version details about your platform.         Current Version       Latest Build         7.3.202112201334       20/12/2021 01:34PM         System Timezone       System Time       Y         Australia/Brisbane       Mon, 20 Dec 21 13:11:15       M	DUT         Back         \$       Image: Commerce Display = Platform = Developers = About         ABOUT         Version Information         View the version details about your platform.         Current Version       Latest Build         7.3.202112201334       20/12/2021 01:34PM         System Timezone       System Time       Your Local Time         Australia/Brisbane       Mon, 20 Dec 21 13:11:15       Mon, 20 Dec 2:	S Image: Signal of the second s	S Image: S   S Image: S   S Image: S   S Image: S   Platform = Developers = About   ABOUT	S Image: Signal of the second s



# 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.

PowerHouse Upskill Administrator Guide - 7.3 009a

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
- 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

DRTS		(
Create custom	report	Rep
REPORTS		1 2 Reports Custom Reports
Course / Asses	sment Reports	Manager Access
View Report	Generate a report on users who have submitted and have passed or failed (courses with assessments only) from a certain date to another date.	YES
View Report	Generate a report on users who have been created that have not submitted (courses with assessments only).	<b>TES</b>
View Report	Generate a report on users who have submitted a survey from a certain date to another date.	
View Report	Generate a report on users <b>who have attempted an assessment</b> from a certain date to another date and failed.	
View Report	Generate a report on users who have not yet completed a course (with or without assessments).	<b>(15)</b>
View Report	Generate a report on users who have submitted results for a scorm object from a certain date to another date.	<b>15</b>
View Report	Generate a report on users who have completed a Scenario which shows the traversal path from a certain date to another date.	<b>(</b>
View Report	Generate a report on users who have passed or failed a course (with or without assessments) from a certain date to another date.	YES
View Report	Generate a report on the <b>cumulative training time</b> by users who have passed courses from a certain date to another date.	<b>E</b>
View Report	Generate a report on users who have courses due to expire or due for re-induction.	
View Report	Generate a report on historical data for users who have completed a course with re- induction settings enabled from a certain date to another date.	<b>(16)</b>

#### 5. Click 'Generate Report'

Back			
Course Report 5   Generate a report on users who have not yet of completed a course (with or without assessments)   Carpet Cleaning Carpet Cleaning Course * </td <td></td> <td></td> <td>Rep</td>			Rep
Generate a report on users who have not yet accompleted a course (with or without assessments) Carpet Cleaning	GENERATE REPORT		
You can filter the results by selecting groups, If you do not choose any groups, the report will be generated for all users in related groups.  Cleaners - Queensland  Cleaners - QLD - Cleaners Clean	Generate a report on users who have not yet		
and Training Plan Manager) Users Select Select User Status You can filter the results by selecting user	You can filter the results by selecting groups If you do not choose any groups, the report will be generated for all users in related	<ul> <li>Cleaners - Queensland</li> <li>House Keeper - QLD - Cleaners</li> <li>Laundry Assistant - QLD - Cleaners</li> </ul>	
		and Training Plan Manager) Select User Status	
status.	status. 4	All Status ~	

# 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

P STORE			199
	e App Store. The following Apps have been int and services. Select an App and follow the co		
Looking for payment gatewa pp Categories: All	Communication A	pps	1 Webinar, email and external messaging.
Partner Integration Communication	Gotobecing is an online metric schematic interfig schematic biotobecing is an online metric schematic metric schematic metric schematic metric schematic computer users, computer users,	Satup	SMTP - Simple Mail Transfer Protection Communitie Lakeling this insegration is an almorative to and emails on your behalf. if enables, all emails sent from the system will be
	Twilio SMS Notifications Commutation Trafic is an SMS service that allows the LHS to dispatch SMS service that allows the LHS to dispatch SMS service that and the service service and the service service and the service the service and the service and the service the service and the service the service and the service and the service and the service the service and the service and the service and the service the service and the service and the service and the service and the service the service and the service a	٩	Zoom Meeting Commaine Toom is avide conferencing tool that here you have virtual one- on-on or tham meetings audit, wide and collaboration features

# 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

Add workflow

Information section, a File Upload section and Verification Tasks.

- Click the 'Add Workflow' button to begin building your Workflows.
- Click 'Build from scratch', if you want to build your own workflow, and then skip to step 4
- Click 'Duplicate from existing workflow' if you have an existing workflow that you want to copy. You can then select the workflow you

#### Create Onboarding and Pre-screening Workflows for your new hires

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



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.

# <page-header><section-header><section-header>

**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.

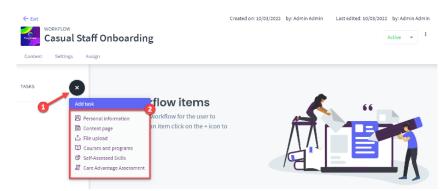
**General:** A General Workflow allows you to create a workflow unique to your organisation. Build your own workflow using the various Workflow Tasks available, including File Uploads, Police Checks, Courses and Self-Assessed Skills.

- 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

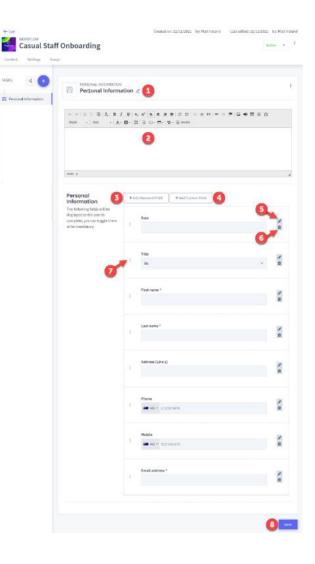


# 5.1.2 Personal Information

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

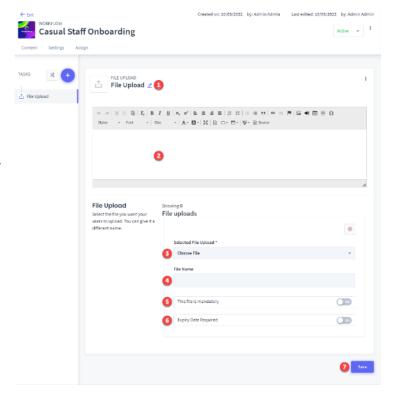


# 5.1.4 File Uploads

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.

- To change the title, click the edit icon, type in the desired title, and click the 'Save' button
- 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
- Toggle YES is if the file has an expiry date (for example, driver licenses and CPR certificates have expiry dates)
- Click 'Save' to save changes. To add an additional File Upload task to your workflow, add another File Upload workflow item

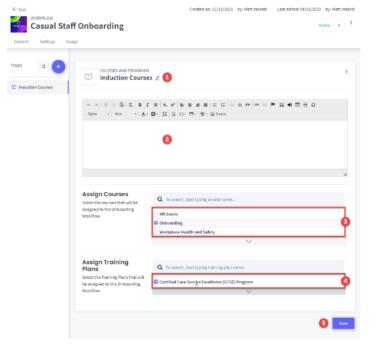


# 5.1.5 Induction Courses

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.

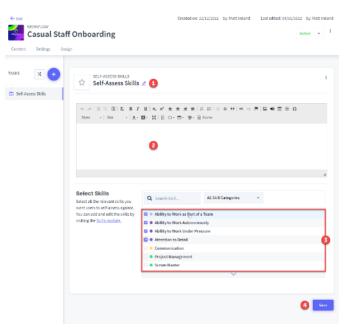
- 1. To change the title, click the edit icon, type in the desired title, and click the 'Save' button
- Provide a general introduction in the CK Editor that explains what you want the user to do
- 3. Select the course(s) that will be assigned to the workflow
- 4. Select the Training Plans that will be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

Casual Staff Onboarding				Active +
ontent Settings Assign				
EDIT ONBOARDING WORKFLOW SETTINGS				
EDIT ON BOARDING WORNFLOW SETTINGS				
Workflow description	Title *			Thumboail
Provide title and a short description to explain to users why they need to take this onboarding workflow.	Casual Staff Onboarding	0		Choose File No file chosen
The set of	Description	-		
		0		
		-		
	0/250			
Timeframe and reminders	Assign Time Frame		Set Reminders	
fou can set a timeframe that the workflow has to be completed in and also set completions reminders.		6 🔍	6	en 🗋
	Please choose a time fran	ne for completion	1 week befor	e
			I day before On the day	
Workflow Type	Workflow Type *			
A workflow can be used in specific ways for different user ypes.	Onboarding			
Norkflow Types include: 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,				
pload compliance and credential files, self-assess				
against required skills and assign themselves to Talent Pools.				
Onboarding: An Onboarding Workflow is used to				
ntroduce 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.				
Seneral: A General Workflow allows you to create a				
workflow unique to your organisation. Build your own				
vorkflow using the various Workflow Tasks available, including file uploads, Police Checks, courses and self-				
assessed skills.				
General Settings	Status*	Assign Certificate		
Provide general information on the onboarding workflow by filling out the details.	Active 👩 -	No Certificate		0
	Send overdue manager ale	erts.		
				9 💷

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

# 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.

0		
ASSIGN ONBOARDING WORKFLOW		
Assign Workflow to Groups		
Workers and Managers assigned to the following groups will have access to this workflow.	Q To search, start typing a group name	
*Please Note: Once you have assigned users to this workflow, some sections will no longer be editable. You	+    Human Resources	
will not be able to add or delete items. Please check the	2 Recruit Job Posts	
following items and ensure they are correct:	test	
<ol> <li>Personal Information - Page fields being mandatory or not</li> </ol>	×	
2. File Uploads 3. Courses / Training Plans		
Transfer after completion		
Select the groups that you would like the user to be assigned to upon successful completion of this	Q To search, start typing a group hame	
Onboarding Workflow. If you do not choose a group/s here, the user will remain	Human Resources	
assigned to the default groups assigned above.	3 Recruit Job Posts	
	test	
	V	
Notification Email	Would you like to send a Notification Email?	
Tick to send all assigned users an email to notify a	Would you like to send a Notification Email? Yes, send a notification email to all assigned users	0
		0

- 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
- 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

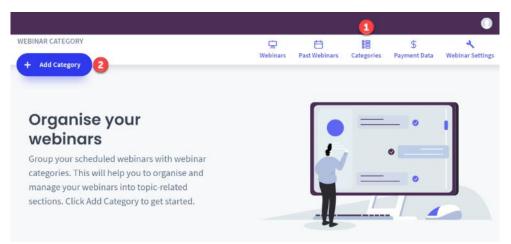
# 6.1 Webinar Manager

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'

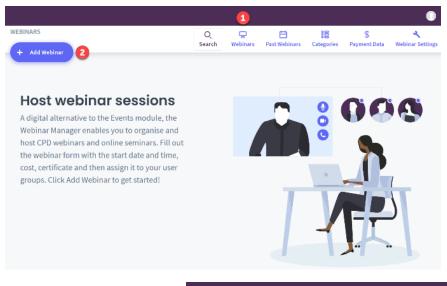


- 3. Add the category title
- 4. Add a category description
- 5. Click 'Save' to save changes

						•
ADD CATEGORY		💭 Webinars	E Past Webinars	88 Categories	\$ Payment Data	<b>بر</b> Webinar Settings
Da						
ADD WEBINAR CATEGORY						
Wahings Onto your Dataila						
Webinar Category Details Add a category for your webinars by adding the name and a short description (if	Category Title *					
required).	Category Description	1				
•	4					
						6
Cancel						Save

# 6.1.2 Add Webinar

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



- Complete fields in General Information. If the 'Show On Frontend' tick box is selected, the webinar will be displayed on the log-in screen.
- Select if the user will receive an attendance certificate after watching the webinar
- 5. Assign webinar to the relevant category
- 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

VEBINAR		₩ebinars	Past Webins	ars Categories	\$ Payment Data	Kebinar Set
ADD WEBINAR			Settings	Description (	Assign to Groups	CPD Category
General Information	Webinar Title*					
with one of our apps HERE. Fick 'Show on frontend' to display the webinar on the eCommerce landing page.	Webinar Unique Ident	ifier				
	Contact Name*			Email*		
	Contact Phone			Mobile		
	Show On Frontend					
Webinar settings	Certificate No Certificate	5	lebinar Cateş Select a web	-	Webinar Status Active	Ÿ
Date & time Provide Information on the date and duration of the webinar.		art Time ' 09:00		Finish Date * 06/01/2022	Finish Time 17:00	i
Thumbnail The thumbnail image should be 500 pixels wide and 500 pixels high. If the image pipoded has streter dimensions, it will be esized and stretched accordingly.	Thumbnail not upload Upload Thumbnail Choose File No file					
Webinar fee Select the applicable webinar fee option, an provide the details as follows.	<ul> <li>This webinars is FF</li> <li>This webinars has</li> </ul>					
	Default Price \$ (eg. 100.	.00)				
	• If a group is assigned for the user	l to more t	han one pric	e, the system wi	ll display the che	apest price
1	Group Price \$ (eg. 100.0		roup Assigne uman Resour	d ces, Recruitmen	t :	¢
e	+ Add Group Price					

## 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			0
+ Add Webinar			Q Sear		Past Webinars	2 Categories	\$ Payment Data	<b>∢</b> Webinar Settings
	ebinars currently listed o	on the site. To edit	the detail	ls of an webinar cl	ick the 'Edit this	Nehinar' icon	in the 'Actions' o	column
Delow is a list of all w	comars currently instead	in the site. To eart	the detail	is of all webinar et	lek the Eule this	Nebiliar leon	in the Actions t	Jotumn.
	Wahinar titla	Access and	UDI	Start	End		Status	Desistrations
135 25±83	Webinar title	Access code	URL	Start 05/01/2022 09:00	<b>End</b> AM 06/01/	2022 05:00PM	Status Active	Registrations 0

#### 6.1.4 Webinar Description

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

				1				•
+ Add Webinar			Q Search	💭 Webinars	Past Webinars	20 Categories	\$ Payment Data	Kebinar Settin
elow is a list of all we	binars currently liste	d on the site. To edi	t the details	s of an webinar c	lick the 'Edit th	is Webinar' icc	on in the 'Actions	' column.
elow is a list of all we	binars currently liste Webinar title	d on the site. To edi Access code	t the details URL	s of an webinar c Start	lick the 'Edit th	is Webinar' icc	on in the 'Actions Status	' column. Registrations

- 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

WEBINAR		Webinars	Past Webinars	Categories	\$ Payment Data	Rebinar Settin
ADD WEBINAR			Settings D	escription	Assign to Groups	CPD Category
Webinar description Provide general information about your webinar.	4 Summary		0			
	0/300 5 Description					Å
	◆ ☆   X 心 江 江   佳 様 Styles ◆   Si	••   = −;	P 🖬 🖷 🗄	$\Xi \equiv \Omega$		
						*

# 6.1.5 Assign Webinar to Groups

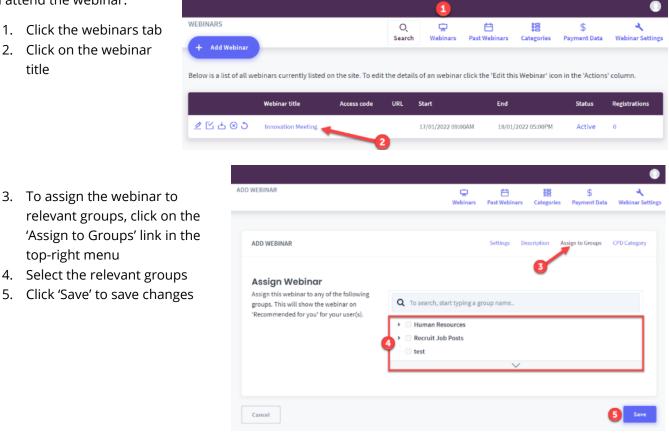
This enables the webinar to be assigned to relevant groups. Learners from the selected groups can then register and attend the webinar.

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

3. To assign the webinar to

4. Select the relevant groups

top-right menu



# 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

WEBINARS		Q Search	₩ebinars	Past Webin	ars Categories	\$ Payment Data	Kebinar Settings
+ Add Webinar		Search	in contains	1 ast 1105	and categories	r aymont Data	Tresman Sectings
Below is a list of all webinars currently listed	on the site. To edit t	he detail:	s of an webinar	click the 'Ed	lit this Webinar' io	on in the 'Action	s' column.
Webinar title	Access code	URL	Start	E	ind	Status	Registrations
ビ 🗄 ⊗ 🗢 Innovation Meeting			17/01/2022 09:0	DOAM :	18/01/2022 05:00PM	Active	0
	2						
EDIT WEBINAR		Ċ,	Ë	18	\$	4	
		Webinars	Past Webinars	Categories	Payment Data Web	inar Settings	
WEBINAR DETAILS			Settings Des	cription Assi	gn to Groups CPD Ca	itegory	
					6		
Assign CPD Hours and Categories	CPD hours				-		
	0.00						
	CPD Categories						
5	CPD training						
Cancel					6	Save	

# 6.2 Event Manager

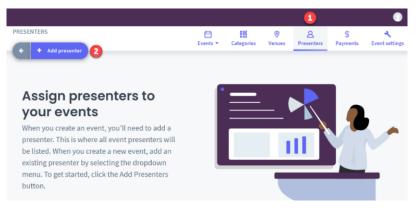
The Event Manager allows you to create and manage face-to-face training sessions, seminars, and instructor-led learning. See a snapshot of attendance and waitlists at any time with powerful reporting capabilities. Fill out all applicable fields, including cost, venue and presenter, and then assign the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

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

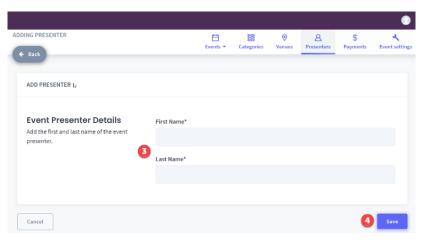
#### 6.2.1 Presenters

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'



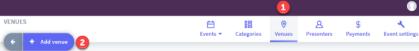
- 3. Fill in the first and last name of the presenter
- 4. Click 'Save' to save changes



#### 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



# Assign venues to your events

This is where you will be able to view a list of venues for your events. When you create a new event, you will be able to add an existing venue by selecting the dropdown menu. To add a new event location, click the Add Venue button.

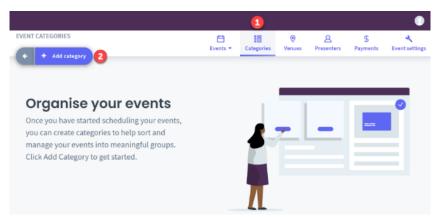


ADDING VENUE		<b>#</b>	18	0	A	\$	•
+ Back		Events *	Categories	Venues		Payments	Event settings
ADD VENUE							
Event Venue Details Add venue details, including the name and address.	Venue Name*	_	_		_	_	
	Street Address 1						
	Street Address 2						
	City *		State*		Postco	ode*	
	Status Active	Ŧ					
		_					
Cancel						4	Save

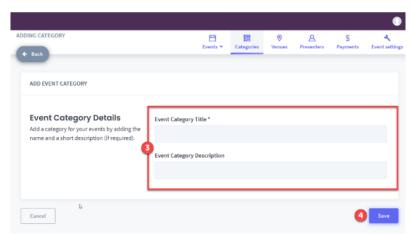
# 6.2.3 Categories

Categories help to sort and manage events into meaningful groups.

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

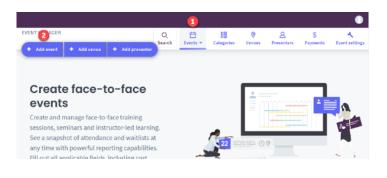


- 3. Add an event category title and event category description
- 4. Click 'Save' to save changes

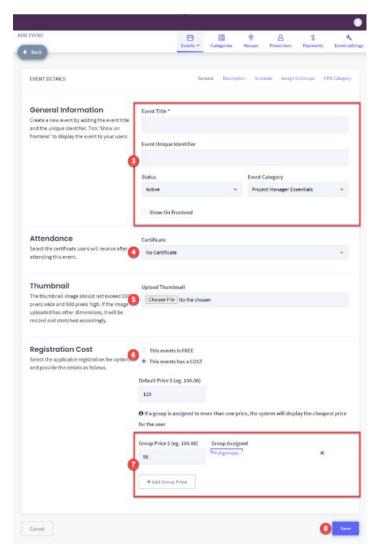


# 6.2.4 Adding an Event

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



- 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.
- 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
- 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

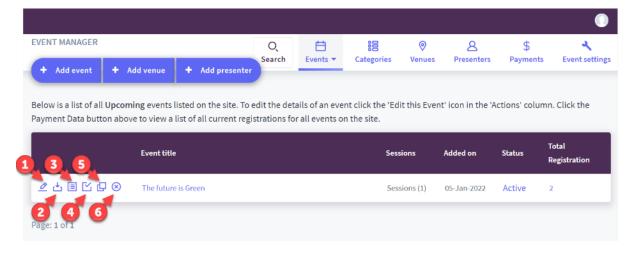


#### 6.2.5 Event Session

- 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
- Set the status. Active: Event is live on the platform and users can register and attend. Disabled: Event cannot be seen on the platform.
- 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

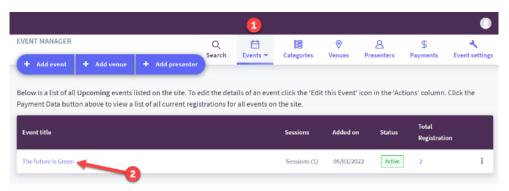
- 1. This allows the Event Details to be edited. Also, there is an option to 'Tag this event to a skill', which awards attendees these skills after they attend the event
- 2. Download Registration details
- 3. View Payment Data
- 4. Mark Attendance can only be done once the event date has passed
- 5.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



EVENT DETAILS		Gener	al Descriptio	n Sessions	Assign to Gro	oups CPD Categ
Session 1 Details	Venue			Presenter		
Provide general information about the deta of each session, such as the venue and presenter. Each session can be edited	Please select		¥	Please sele	ct	Ŧ
independently and can occur on multiple	Start / Finish Date	Time *	Max Attendee	es *	Status	
dates at several venues.		5			Active	*
6	Allow registration	between St	art and Finish	Date		
					8	+ Add Session

## 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

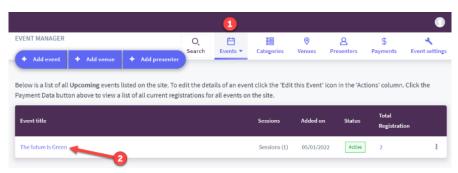


- 3. To add a description, click on the 'Description' link
- 4. Add a summary
- 5. Add a description
- 6. Click 'Save' to save changes

EVENT	C	) <u>8</u> \$ •
Back	Events 💌 Categories Ven	ues Presenters Payments Event s
EVENT DETAILS	General Description	Sessions Assign to Groups CPD Categor
Event Description	Summary	
Provide general information on the event.	заппа у	
-	0/300	
	Description	
	$\Leftrightarrow \Rightarrow   X \cap \square   I_x   B I   U   X_z \times I_z$	
	]≣ :≡   4≋ 4€ 99   600 - 62   10 - 10 - 10 - 10 - 10 - 10 - 10 - 10	
-		
5		
		4

## 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



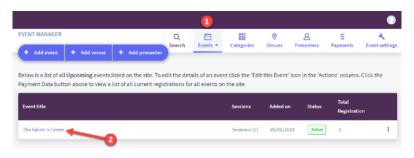
- 3. Click on the 'assign to groups' link
- 4. Select the relevant groups
- 5. Click 'Save'

EVENT		Events 🔻	20 Categories	Venues	8 Presenters	\$ Payments	Rvent setti
- Back							
EVENT DETAILS		Ger	neral Descrip	tion Sessi	ions Assign		PD Category
Recommend Event Assign this event to any of the following	Assign event						
groups. This will show the event on 'Recommended for you' for your user(s).	Q To searc	h, start typing	g a group name	h			
	Humar   Recruit	n Resources t Job Posts					
	- test	JOD POSIS					
				$\checkmark$			

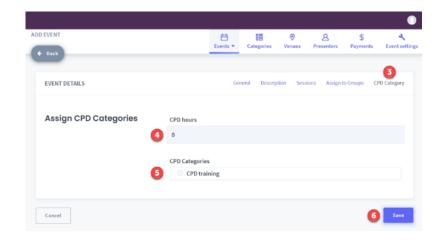
#### 6.2.9 CPD Category

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.

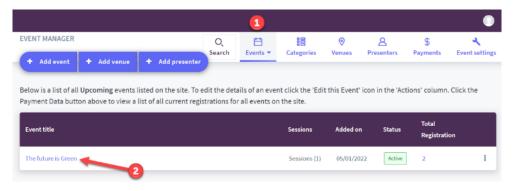
- 1. Click the 'Events' tab and click 'Upcoming/active events' from the drop-down
- 2. Click on the event title

	EVENT MANAGER			Q Search	1	:8	0	8	\$	•			
		Upcoming events listed		edit the det			Venues t this Event' i	Presenters	Payments	Event settings Click the			
	Event title	on above to view a list of	all current reg	istrations fo	or all events o	n the site. Sessions	Added on	Status	Total Registratio	on			
	The future is Green	-2				Sessions (1)	05/01/202	2 Active	2	i			
			EDITI	NG EVENT				Ê	3		A	\$	( 
			C	Back				Eve	nts 👻 Categ	ories Venues	Presenters	Payments	Event sett
Click on the "		lds' link		EVENT DETA	IILS		General I	Description S	iessions Cust		to Groups W	aiting list Cl	PD Category
Type your qu Select a ques					Custom	Fields	No Cust	om Fields crea	ted				
Select if the			/	Refresh									
Click 'Add Fie question	eld' to add a	notner		Custom field		ask the users		our question					
Click 'Save' to	o save chan	ges		answers the	questions inc	vent. If the user orrectly, they wil from registering	l						h
				the event.			5 Selec	ype ct a question ty	/pe				Ŧ
								question "Mar	ndatory"?				
						•		d Field					
				Cancel									Save

#### 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

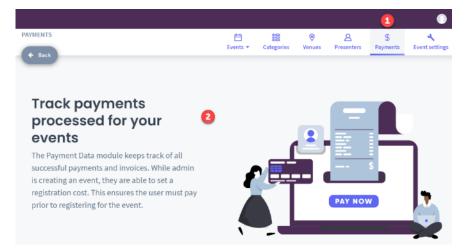


- 3. Click on the Waiting list link
- 4. Click 'Add attendee' to add them to the event
- 5. Click 'Save' to save changes

NG EVENT Back				Events 👻 🖸	Categories	<b>⊘</b> Venues	8 Presenters	\$ Payments	بر Event setti
EVENT DETA	ILS	Genera	al Description	Sessions	Custom field	s Assign	to Groups V	3 Vaiting list CP	D Category
	Venue	First Name	Last Name	Email	PI	none Da	te /	Action	
Session	venue								

#### 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

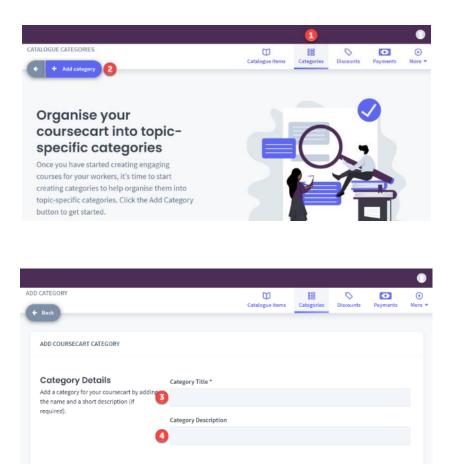
							10
ENT SETTINGS	Even		Categories	(9) Venues	8 Presenters	\$ Payments	Rvent settings
4 Back							
GLOBAL EVENT SETTINGS							
Available settings	Auto-register users from	m the w	aitlist			2	
Customise the way your site handles event registration.							
Event Waitlists							
If you have auto-register enabled, when an events' session max attendees is increased OR							
if an existing registration is cancelled, users in							
the waitlist will be auto-registered to the event							
Cancel							Save

## 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'

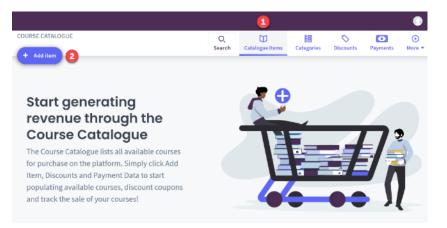


- 3. Add Category Title
- 4. Add Category Description
- 5. Click 'Save' to save changes

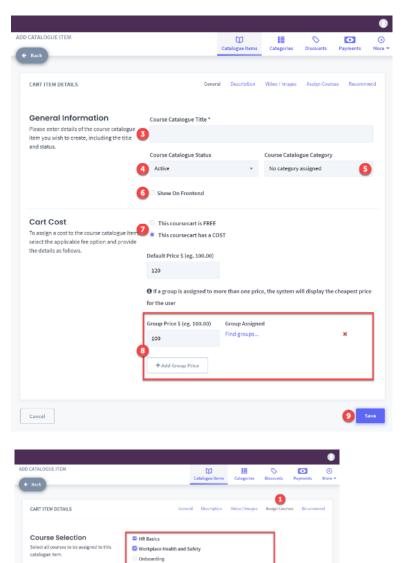
Cancel

## 6.3.2 Add Course Catalogue Item

- 1. Click 'Catalogue items'
- 2. Click 'Add item'



- 3. Add a course title
- 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
- 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



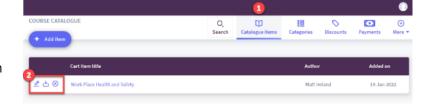
Building Relatio Empathy Active Listening People Manager

Cancel

Save

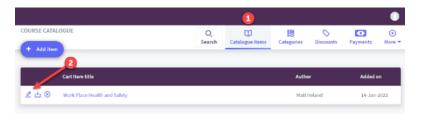
#### 6.3.4 Course Catalogue Action Buttons

- 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

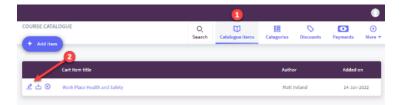


- 3. Click on the 'Description' link
- 4. Add a summary
- 5. Add a description
- 6. Click 'Save' to save changes

						۰
EDITING CATALOGUE ITEM		Β	韻	0	•	۲
(* Back		Catalogue items	Categories	Discounts	Peymenta	More *
CART ITEM DETAILS	Gene	ral Description	Video / Images	Assign cour	ses Recomm	rend
Cart Item Description Add a short summary and description for your course catalogue item. This will be displayed to your workers.	4 Summary					
	0/300					
	5 Description					
	* *   X % B   K					
	21 11   宗 孝 99   48 Dyles -   52m	• ⊴ № 12 •0 •   <u>A</u> • 123 •   20		雙- 🗟 Box	100	
	Insert cart description	here				
Cancel					6	Save

#### 6.3.6 Adding Videos and Images

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



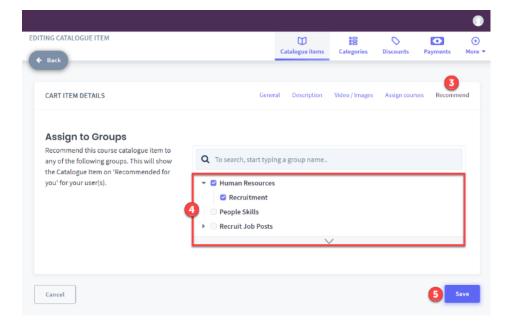
- Option to enter the URL to an embedded video (YouTube, Vimeo etc.). The learner will see the video when clicking the 'View Details' button (of the course) in their portal
- Click 'Choose File' to upload the main image for the course. The learner will see this image when they click 'Buy Courses' in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

 $\mathbf{O}$ Catalogue items Cate IB S ategories Discounts P ⊙ CART ITEM DETAILS Video Video URL (Vimeo/YouTube Please provide the URL to an embedded version of an externally hosted video, if required. 6 Images Main Imag Each image should be 500 pixels wide and S00 pixels high. If the image uploaded is different it will be resized and stretched accordingly. Image 1 Image 2 Choose File No file chosen Choose File No file chosen Image 3 Image 4 Choose File No file chosen Choose File No file chosen Image 5 lmage 6 Choose File No file chosen Choose File No file chosen 6 Save Cancel

#### 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

items' tab			1				0
link	COURSE CATALOGUE	Q Search	Catalogue items	88 Categories	Discounts	Payments	↔ More ▼
oup(s)	Cart Item title			Autho	r	Added o	'n
nges	🖉 📥 🛞 Work Place Health and Safety			Matt	reland	14-Jan-	2022



#### 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'

				1		۰
COUNTS		Catalogue items	88 Categories	Discounts	Payments	⊙ More ▼
ADD COUPON	COUPONS					
Code						
Discount (1-99) % Expiry date						
5 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 dropdown
- 3. You will be taken to the Payment Settings



		3				
Back		\$ E-commerce	isplay ▼	Platform 👻	<∕> Developers ▼	<b>☆</b> Indigo
Back						
PAYMENT GATEWAYS						
Below are the payment gateways we offer as sta	indard to integrate w	ith. Click on	the configure b	outton to add y	our credentials to	get started
PayPal Configure	stripe Stripe Config	ure				
PAYMENT SETTINGS						
Tax Settings	Business Number					
Add a Business Number (eg: ABN, GST Number, CRN, Companies House Number						
etc) to show on any invoices produced by the portal.	Business Number	Label (to app	pear on all inv	oices):		
- Customise the currency and currency symbol that will apply to all eCommerce items on the	eg: ABN, GST Nu	mber, CRN, C	ompanies Hou	ise Number etc		
site.	Payment Currency	/			Currency	
Assign and customise a tax percentage that will be applicable to all purchases made on	Australian dollar	(AUD)		*	Symbol	
this site.					S	
	Include Tax on Pu	rchases	Tax Text		Tax Percentage	2
	OFF		GST		10 %	
			You can enter : name for your etc.			
Alternative Login Page	Display the eCom	merce login p	oanel in differe	ent areas:		
Adjust the eCommerce login panel.	Default (In the M	iddle)				*
	Display the eCom					
	Use your mouse to	drag and dro	op each item in	nto the order yo	u desire.	

# 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

						٥
ADD COURSE CATEGORY	Course	Add SCORM course	止 Import course	88 Categories	Marking	⊕ More ▼
ADD COURSE CATEGORY						
Course Category Information Add the title of the new category.	Category Title *					
Cancel					4	iave

#### 6.4.2 Adding a Course

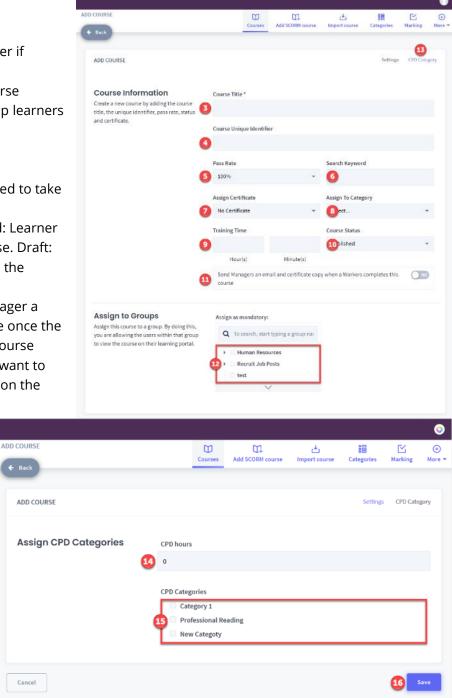
- 1. Click on the 'Courses' tab
- 2. Click 'Add course'



Start creating courses Enhance your workers (learner) skills by adding or importing courses to your online training platform. Ensure compliance in your workplace today. Click Add Course to start!



- 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
- 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
- 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'

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Thumbna. <sup>2</sup> Course Details	ionships with C		S 🔳			Status	
Author: Matt Ireland							

- 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'

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전 프 단 속 쇼 등 삼 ⓒ Building Relatio	onships with Cust	comers 🔣 Course Category			Status	

- 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

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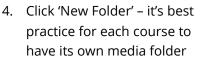
#### 6.4.6 Creating Course Pages from a Template

- 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

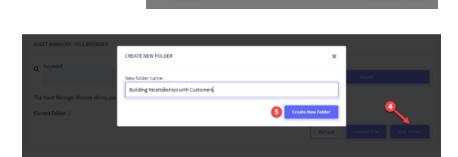
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## 6.4.7 Uploading Images and Audio Files

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



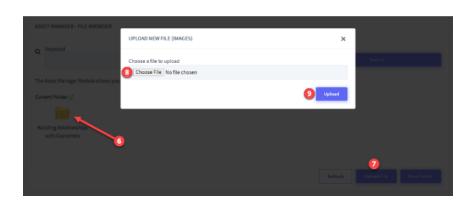
5. Name the folder and click 'Create New Folder'

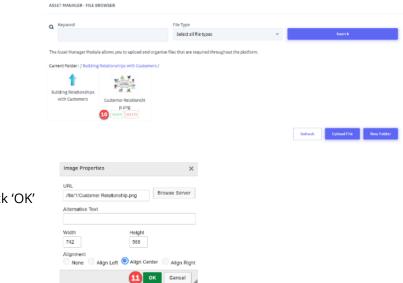


- 6. Click the new folder
- 7. Click 'Upload File'
- 8. Click 'Choose File' and select the relevant file from your hard drive

10. Hover over file and click 'Insert'

9. Click 'Upload'

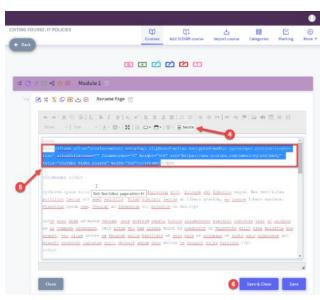


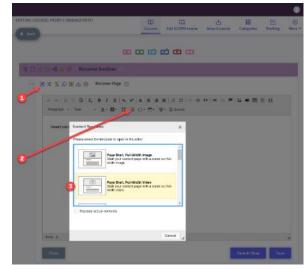


11. Select centre align (optional) and click 'OK'

## 6.4.8 Adding a Video

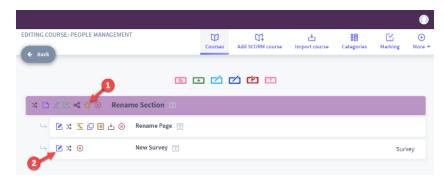
- 1. Click the 'Edit this page' icon
- 2. Click the 'Templates' icon
- 3. Click 'Page start, full-width video'
- 4. Click 'Source'
- Replace code between <div> and </div> tags with the embed code for the video that you would like to use (as highlighted in the image)
- 6. Click 'Save & Close'



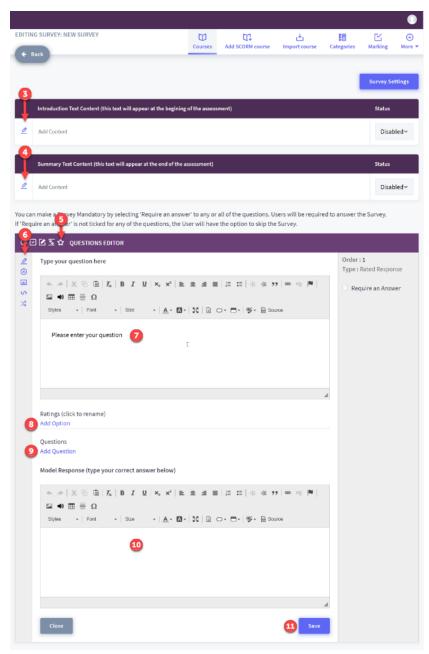


# 6.4.9 Adding Rated Response Question

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



- 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
- 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
- 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

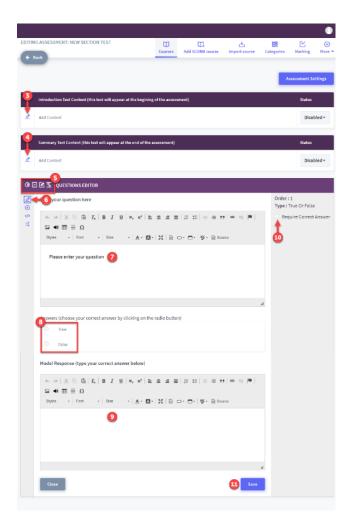


## 6.4.10 Adding a Test or Practice Test

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

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EDITING COURSE: PEOPLE MANAGEMEN	Т	Courses	Add SCORM course	ഥ Import course	88 Categories	└ Marking	↔ More ▼
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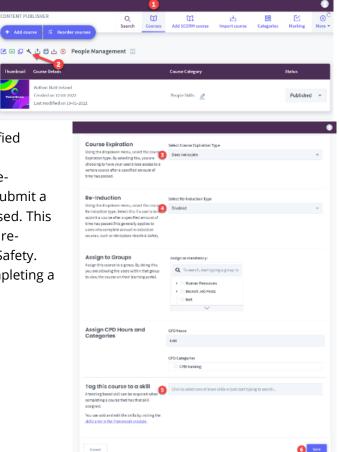
- 3. Click the 'Edit' icon if you would like to add introduction text at the beginning of the assessment
- 4. Click the 'Edit' icon if you would like to add summary text at the end of the assessment
- 5. Select from True or False, Multiple Choice, Short Answer or Re-order Question from the question editor
- 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
- 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 reinduction 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

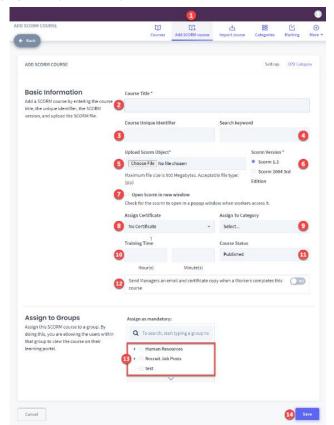
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EXPORT COURSE 2							
Export Course							
Exporting a course will save all content,							
assessments, to a single file that can be used to import it again.							
comporte again							
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Cancel					3 🗗	port Course	

#### 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.

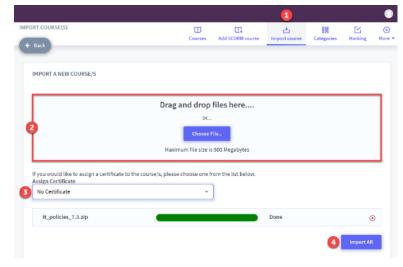
To populate a SCORM course 'by itself' with no other course pages required, steps are as follows:

- 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'
- 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

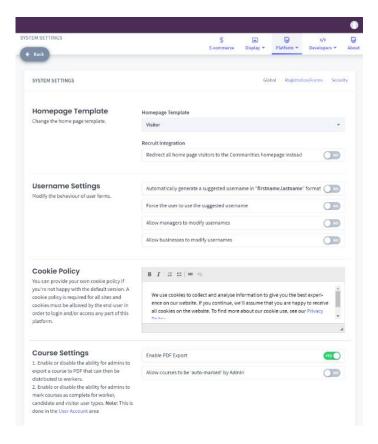
ARKING ASSES	SMENTS			Courses	CI Add SCORM course	년 Import course	88 Categories	1 Marking	() () More
Submit Date	Mark	Worker (Learner) ID	Name	Assessn	nent				
22/07/2021	1	18	Sarah Cook	Sales 1	actics and Approach I	Management_ Sho	wcase - Assess	sment	
22/07/2021	1	11	Jason Holmes	Sales T	factics and Approach I	Management_ Sho	wcase - Assess	sment	
22/07/2021	1	15 2	Rayna Greenburg	Sales T	factics and Approach I	Management_ Sho	wcase - Assess	sment	
07/07/2021	1	13	Stacey Phipps	Sales 1	factics and Approach I	Management Test	1 - Assessment	t	

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

EDITING A	ASSESSMENT MARKING	Courses	Add SCORM course	dimport course	Categories	Marking	) More
U	t is best practice to wine and dine your potential cl Jser Answers : False Correct Answers : False	lients in order to ma	ke a sale.		User A Correc	nswer is : t	
	You are a sales rep seeking to build your portfolio. 1 Choose the most reliative response. User Answers : b) Review your current business stri development currently used. Correct Answers : b) Review your current business subless development currently used.	ategy and tailor you	r approach based off s	uccessful business	Correc	nswer is : t	
Q3 V	Why aren't you able to wine and dine clients to ach Jser Answers : Naughty	ieve an outcome?				nswer is : t value	•
It	Correct Answers : I is not best practice to constantly be using busine bottom line, prior to a potential return on investme		outcomes, based on th	is hitting your			
u	What is the correct order for a sales pitch and outco Jser Answers : Correct Answers :	ome?			User A	nswer is :	

#### 6.4.16 More – Global Settings

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

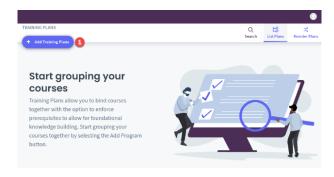


# 6.5 Training Plan Manager

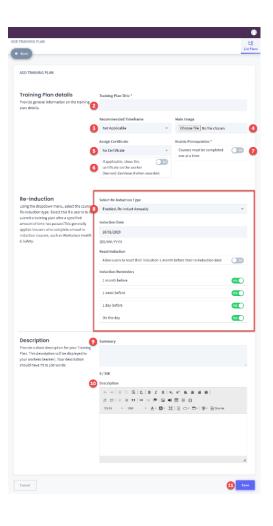
The Training Plans Manager allows you to bind courses together with the option to enforce prerequisites to allow for foundational knowledge building.

## 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 resubmit 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

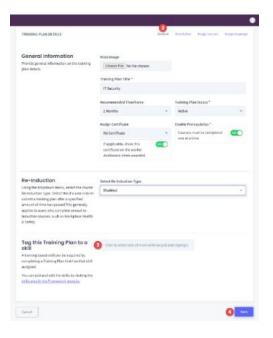


#### 6.5.2 Tagging a Skill to a Training Plan

1. Click the training plan title

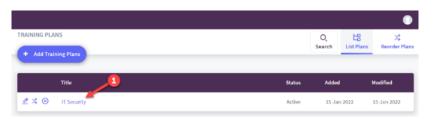


- 2. Click the general link
- 3. Type in the skill(s) the learner will achieve after completing the training plan
- 4. Click 'Save' to save changes

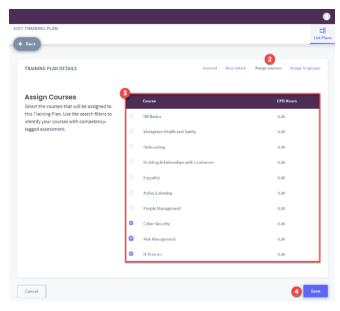


## 6.5.3 Assign Courses

1. Click the training plan title

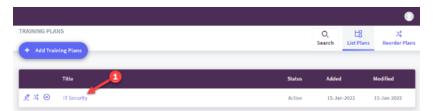


- 2. Click the 'Assign courses' link
- 3. Select the course(s) that will be assigned to the training plan
- 4. Click 'Save' to save changes

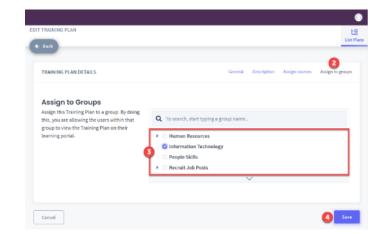


## 6.5.4 Assign Training Plan to Groups

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:

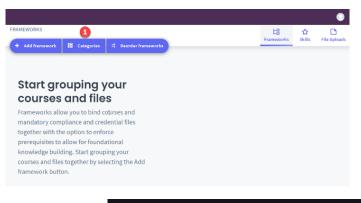
- The Pre-Screen/Onboard Workflows
- The Job Match Score
- The Work Ready Shield

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

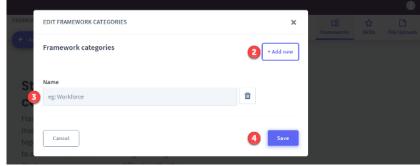
- The required training courses (please review the Content Publisher section of the Admin Guide)
- The required skills and skills evidence (please review the File Upload section of the Admin Guide).
- The required compliance, credential and vaccination files (see the File Upload Section of the Admin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

#### 6.6.1 Adding a Category

1. Click the 'Categories' button

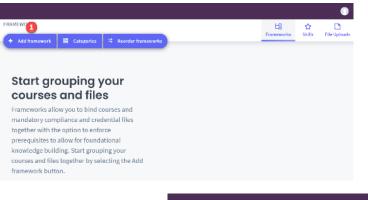


- 2. Click 'Add new'
- Add a category name To add multiple categories, go back to step 2
- 4. When finished click 'Save' to save changes



#### 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
- 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

· Back				
ADD FRAMEWORK			Settings Describ	tion
Framework introduction	Framework	title		
Provide a title and an image.				
	Thumbnail			
•	Choose P	ile No I	ile chosen	
General Settings	Status		Category	
Select the Status and Category associated to this Framework.	Active	*	Please Select	5
			To manage categories, please navigate back to Frameworks.	

#### 6.6.2.1 Skills

You can build all necessary skills required for the job role that the candidates and future employees can selfassess 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

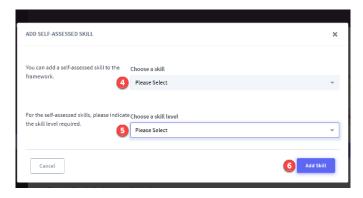
+ Add framework	📕 Categories 🔀 Reorder fram	neworks		Frameworks	Skills File Upl
C Search Frame	Showing 6 of 6 Frameworks			Sort	by Framework Titl
Status					
All statuses	Activity Volunteer - Volunt	eering - Active I		er - Residential A	ged Active I
<ul> <li>Active</li> </ul>	Framework		Care (RAC	) - Framework	
O Disabled	Skills Compliance	Credentials	Skills	Compliance	Credentials
Framework Categories	☆9 ⊡1	<i>∎</i> 0	☆ 10	<b>D</b> 1	<i>s</i> 0
All					
Disability Services	Nurse - Residential Aged C	are (RAC) Active		Residential Aged	Care Active
Residential Aged Care (RAC)	- Framework		(RAC) - Fra	imework	
Volunteering	Skills Scompliance	Credentials	Skills	Compliance	Credentials
Allied Health	☆O ⊡1	<i>s</i> 0	☆ 0	<u>n 1</u>	<i>s</i> 0
Cleaners					
⊕ Edit Categories	Occupational Therapist - A Health - Framework	llied Artive 1		nd Laundry Assist Framework 🦷	ant - Active I
	Skills Compliance	Credentials	Skills	Compliance	Credentials
		e 0	☆ 0	n Ö	<b>a</b> 0

2. Click on the 'Skills' tab

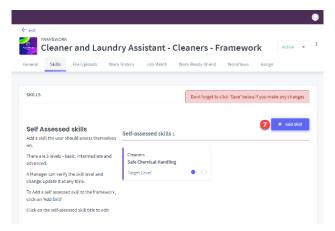
3. Click 'Add skill' to add a self-assessed skill. This is where the user can assess themselves against desired skill(s) for the role. A manager can verify the skill level and change/update it at any time.

🗧 Cl😰	ner and La	undry As	sistant -	Cleaners - F	rameworl	Active	* <sup>1</sup>
neral Skills	File Uploads	Work History	Job Match	Work Ready Shield	Workflows	Assign	
KILLS				Dont forget to a	lick 'Save' below if	you make any chan	Bes
							_
Self Assess	ed skills					3 + Add Sk	au
idd a skill the use	r should assess then	selves					
	- basic, intermediate	and					
Manager can ver hange/update it :	ify the skill level and at any time.						
o Add a colf accor	sed skill to the fram	ework.					

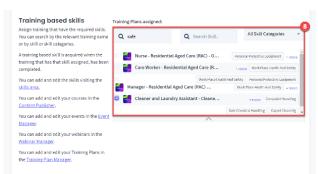
- 4. Choose a skill that the learner can self-assess against
- 5. Set the skill level that you require for this position
- 6. Click 'Add skill'



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)

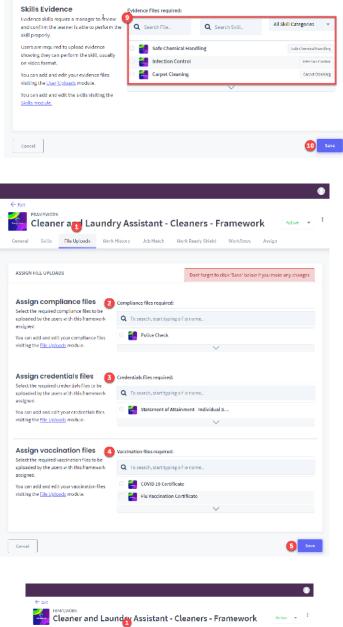


- Select the skills evidence files (File Uploads) that will enable the candidate to upload evidence showing that that they can perform the skill properly. Their manager can then review and confirm that the learner has the required skill
- 10. Click 'Save' to save changes

#### 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





Skills Flie Upleads Wark History Job Match Work Ready Shield Workflows Assign

+ Add Castom Field

Don't forget to click 'Save' below if you make any changes

WORK HISTORY PROFILE

Work History Profile

required by visiting the <u>User Accounty</u> module. The best custom field to use for the Work History questions are dropdowns as these can scared in the Job Match Frofile.

Add questions about the candidates (candidate) work history that are relevant for this lob.

#### 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

menal Skills FileDplcoads Wor	History	Juli Match	Work Ready Shield	Workflows Assig	2
NORK HISTORY PROFILE			Don't forget to cl	ck 'Save' below if you m	ake any changes
Work History Profile tod questions about the candidate: candidate; work history that are relevant for histipb. four an add and odd the castor fields explicit by visiting the User Accounts	+ Ada	l Custom Field Do you have e No	xperience cleaning in ag	ol care facilities? *	- 1
nocluic. The best custom field to use for the Work tistory guestions are dropdowns as these					

#### 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.

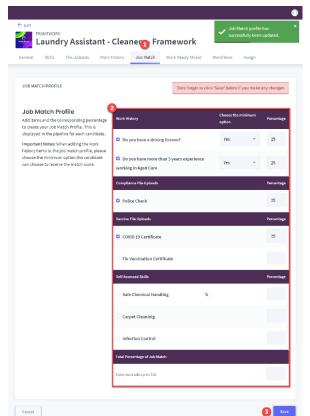
- 1. Click the 'Job Match' tab
- 2. Select the items you would like in your Job Match and rate the importance as a percentage. All selected items must add up to 100%
- 3. Click 'Save' to save changes

#### 6.6.2.5 Work Ready Shield

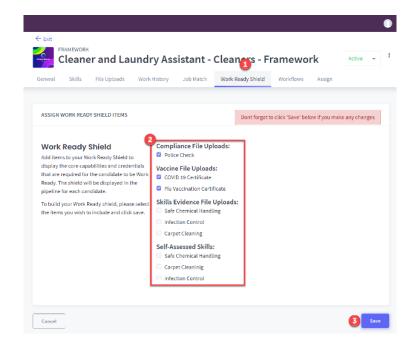
The Work Ready Shield allows you to specify the tasks or uploads that the candidate requires to start work immediately. It is expected that these tasks or uploads will be part of the pre-screening selection. The Work Ready Shield allows the recruiter to target the exact files and information that is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

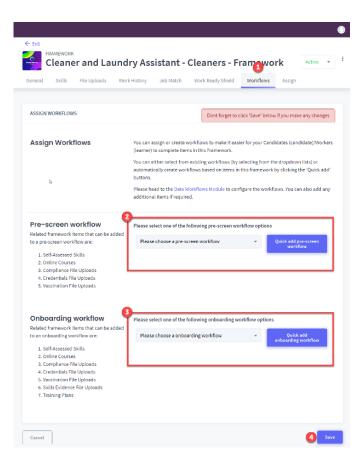
You can assign a pre-screen workflow, an onboarding workflow or both in this section. You can either select from existing workflows (by selecting from the dropdown lists) or create workflows based on items in this framework by clicking the 'Quick add' buttons.

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

- 1. Click the 'Workflows' tab
- 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
- 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.

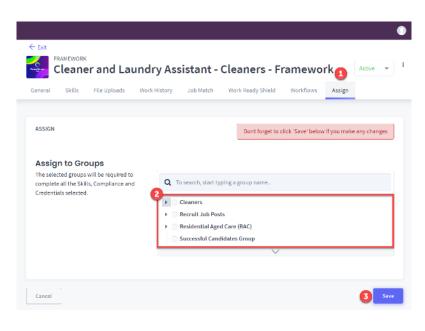
4. Click 'Save' to save changes



#### 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.

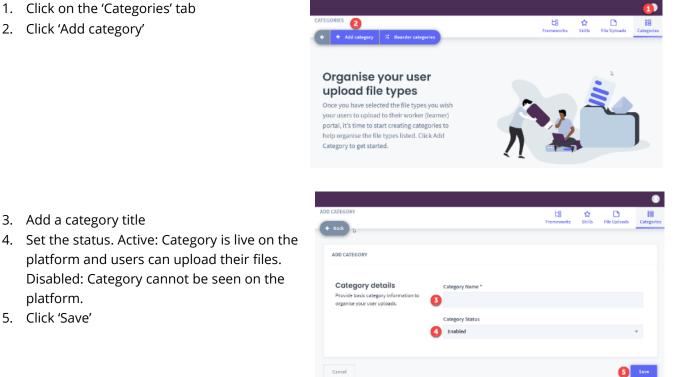
+ Add general file	+ Add cate	zory	Frameworks	Skills File Uplo	ads Categ
Q Search Files File Types General	Showing resu Flotype 9mm Clear all filter	i ×			
Compliance	Showing 3 of Genera				
<ul> <li>Credentials</li> </ul>	General	rnes			
<ul> <li>Skills Evidence</li> </ul>		Name	Category		Status
Vaccinations	₫ ⊗	Employees detail form	Employee Relations		Active
		Police Check			Activ
	0	POIRCE CRECK			

## 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



# 6.7.3 Adding a File

platform.

5. Click 'Save'

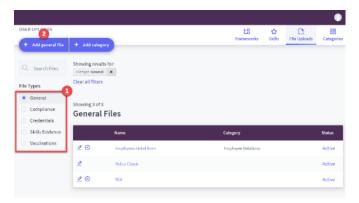
When adding a file for the first time you will only have the option to add a general file.

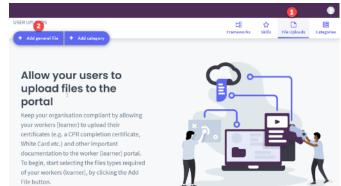
platform and users can upload their files. Disabled: Category cannot be seen on the

- 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'



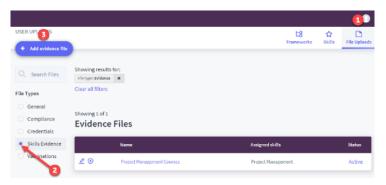


- 3. Enter the File Name
- 4. Select the category
- Set the file status. Active: File is live on the platform and users can upload their files. Disabled: File cannot be seen in the user's portal.
- 6. Add a summary
- 7. Toggle ON/OFF if an expiry date is required
- 8. Toggle YES/NO if the manager should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

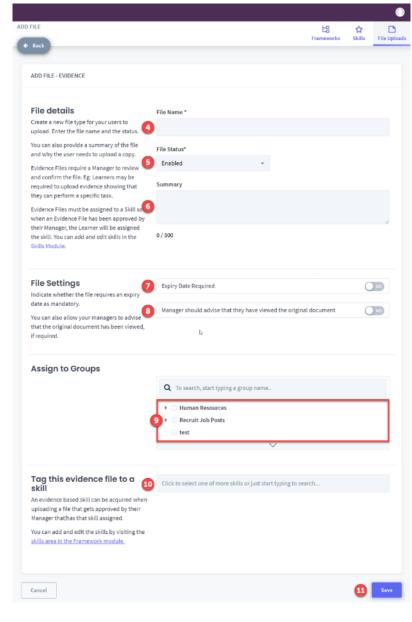
FILE			比암	Û	D	
Hack			Frameworks	Skills	File Uploads	Cat
ADD FILE - GENERAL						
File details	File Name *					
Create a new file type for your users to upload. Enter the file name and the status.	3					
You can also provide a summary of the file and why the user needs to upload a copy.	Category		File Status*			
	9 Please Select	*	Enabled			¥.
	Summary					
	6					
	0/300					
File Settings	2 Expiry Date Required				Q	
date as mandatory.	8 Manager should advise tha	t they have viev	red the original	documen	. 0	
You can also allow your managers to advise that the original document has been viewed, if required.						
Assign to Groups						
	Q To search, start typing	a group name				
	• 🗍 Human Resources					٦
	People Skills	logy				
	🕨 🔄 Recruit Job Posts					
			$\sim$			
Cancel						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
- 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'

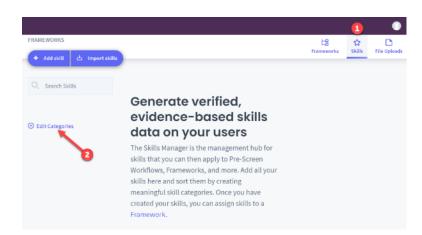


## 6.8 Skills

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

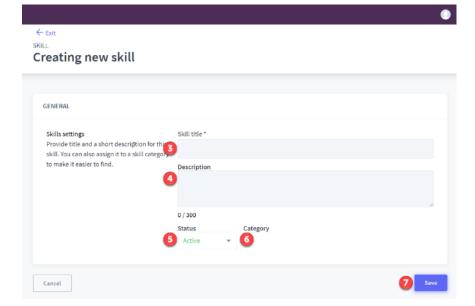
FRAME	EDIT SKILL CAT	EGORIES			×		<b>D</b> File Uploads
(+ A Q s	Skill categor	ies		3 + Add r	new		
	Color	Name 5 Vorkforce			Ŵ		
⊕ Edit							
	Cancel	Worktiows	Frameworks, and m	6 Sav	ve		

## 6.8.2 Adding a Skill

- 1. Select the 'Skills' tab in the Framework Manager
- 2. Click 'Add skill'

			1	0
FRAMEV 2KS		Frameworks	<b>☆</b> Skills	File Uploads
+ Add skill 📥 Import skills			_	
O Search Skills				
	Generate verified,			
• Edit Categories	evidence-based skills			
C rain outlight to	data on your users			
	The Skills Manager is the management hub for skills that you can then apply to Pre-Screen			

- 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'

			1	0
FRAMEWORKS 2 + Add skill the Import skills		Frameworks	☆ Skills	File Uploads
O Search Skills				
• Edit Categories	Generate verified, evidence-based skills data on <sub>:</sub> your users			
	The Skills Manager is the management hub for skills that you can then apply to Pre-Screen			

- 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'

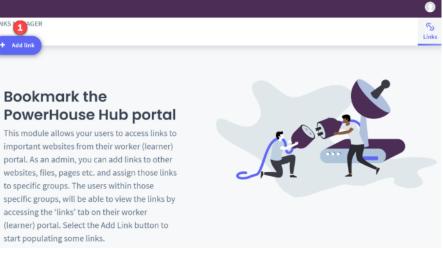
ORT SKILLS	E8 Frameworks	<b>☆</b> Skills	File Upload
BULK IMPORT SKILLS AND CATEGORIES			
Please select an LMS compatible CSV file to import. You can obtain the required template by clin Maximum file size: 500 MB	cking the "Download CSV Tem	nplate'' lin	nk below.
Choose File No file chosen Download CSV Template			
Categories: If you wish to create/assign categories to the skills you are importing, please add the name of th system finds a category with the same name, it will assign the skill to that category. If the catego			
and the skill will be assigned. Please Note: For new categories, no colour will be assigned, you can update this in the 'Edit Cat Duplicates:	°		
Any duplicate, or already existing skills will be ignored and you will be notified of these at the er	nd of import.		
Cancel	9	Validate	å 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 dropdown 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'

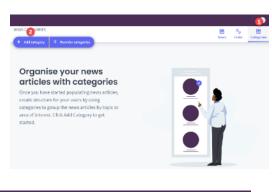
LINK Back				
LINK DETAILS				
Basic Link Information Provide the full URL (including the "http://" for the link you wish to include.	Link Title *			
General Settings Provide the general settings of the link, including the author and status.	Author * Admin Admin	Status * Published	- 5	
Date Range Add the published and removal dates.	Published Date	Removal Date 28/02/2023		
Assign Link Assign this link to groups.	Assign to Groups			
6	<ul> <li>Cleaners</li> <li>Laundry A:</li> <li>Recruit Joi</li> <li>Residentia</li> </ul>			
		~		
Cancel				8 Sav

# 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'

			•
5		E News	18 Categories
na -			
CATEGORY DETAILS			
News Category Details	Category Title *		
Add a category for your news and links by adding the name and a short description (F required).			
	Category Description		
٥			
Cancel		0	Seve

#### 7.2.2 Add News

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

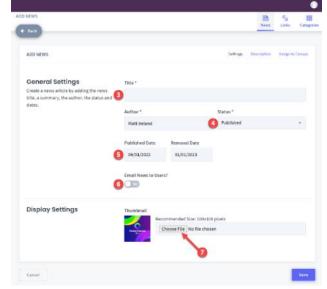


Add news

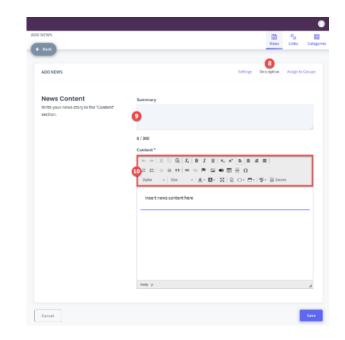
Broadcast company updates and announcements to your users through the News Editor. You can also choose to email updates to your staff with the click of a button. Simply write your news update, consider adding relevant links or images, then assign it to user groups. Click Add News to start.



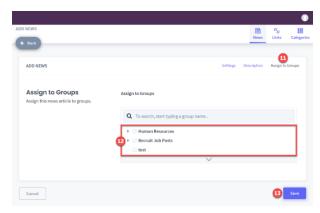
- 3. Add a title
- 4. Set the status. Published: News article is live and can be viewed. Draft: Keeps news hidden from users
- Add a publish and removal date. Learners won't be able to view the news article until the selected publish date and won't be able to view after the removal date
- 6. Toggle YES/NO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

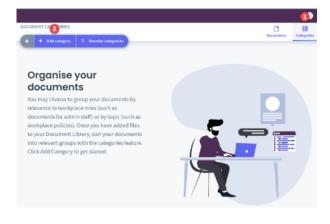


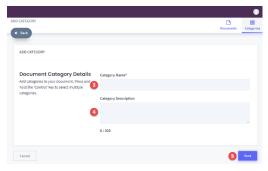
# 7.3 Document Library

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

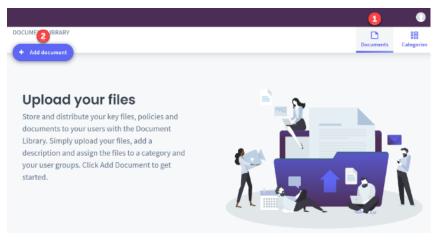
- 1. Click on the 'Categories' tab
- 2. Click 'Add category'
- 3. Add a category title
- 4. Add a description
- 5. Click 'Save'



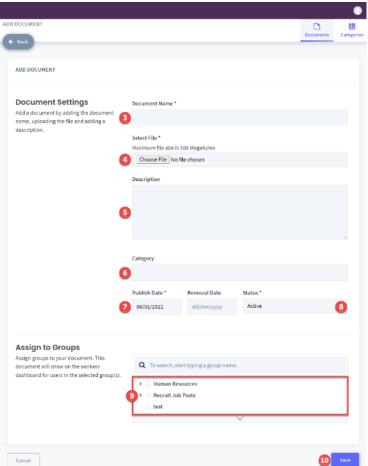


# 7.3.2 Adding a Document

- 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
- 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

PowerHouse Upskill Administrator Guide - 7.3 009a



# 7.4 Workforce Insights

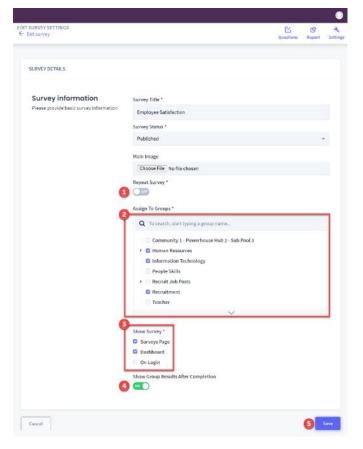
This is where you can choose from pre-made surveys to get insight from your workforce. Surveys can be sent as a one-off or automatically sent after a selected number of days.

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

 FORCE INSIGHTS			Surve
Add Survey			
Title	Result	Participation	Status
Employee Satisfaction		No Users Assigned	Published
Employee Dit Survey		No Users Assigned	Publishe
Employee Nel Pramoler Score Survey (eNPS)		No Users Assigned	Publishe
Customer Net Promoter Score		No Users Assigned	Publishe
Sentiment Check (Mood)		No Users Assigned	Publishe
Initiative Check (Employee Reactions)		No Users Assigned	Publishe
Risk Assessment: Workplace Hazards		No Users Assigned	Publishe
Risk Assessment: Employee Risk Profile		No Users Assigned	Publishe

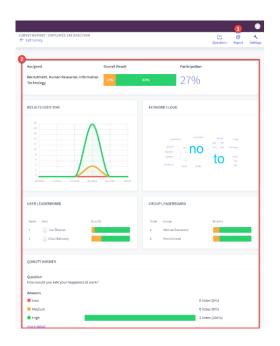
#### 7.4.1 Survey Settings

- 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

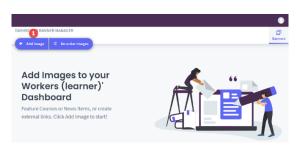
- 1. Click on the 'Report' tab
- 2. Review the results of your chosen survey



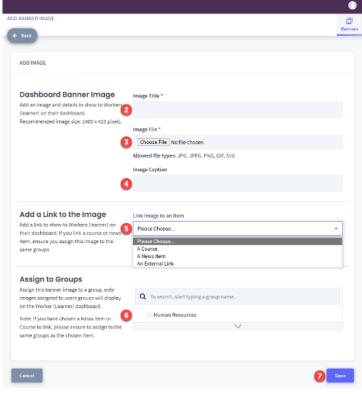
# 7.5 User Dashboard Banner

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
- 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'

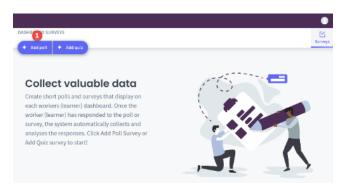


# 7.6 Dashboard Surveys

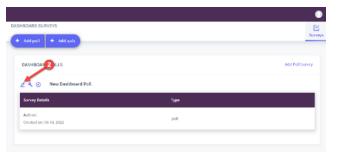
Dashboard Surveys can collect valuable data for your organisation. Create short polls and surveys that display on each worker (learner) dashboard. Once the worker has responded to the poll or survey, the system automatically collects and analyses the responses.

## 7.6.1 Add a Poll (True Or False Question)

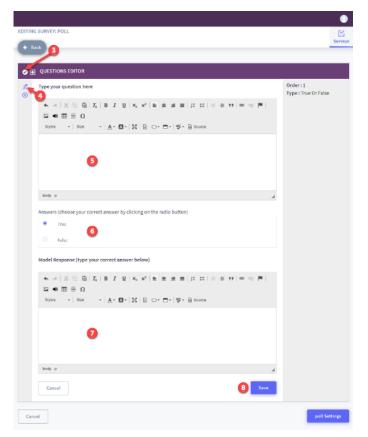
1. Click 'Add poll'



2. Click 'Edit' to add questions

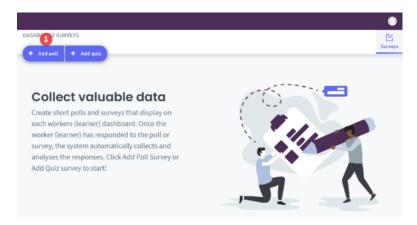


- 3. Click to add true or false question
- 4. Click the 'Edit question' icon
- 5. Click in the box to type your question
- 6. Choose the correct answer by clicking on the radio button
- 7. Click in the box to type the correct answer
- Go back to step 2 to add additional questions.
   When finished click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



# 7.6.2 Add a Poll (Multiple Choice Question)

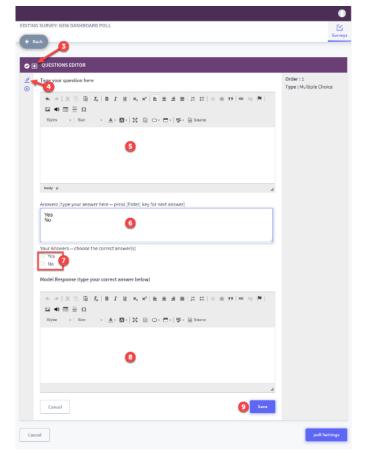
1. Click 'Add poll'



2. Click 'Edit' to add questions

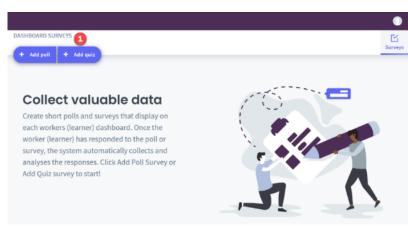
Add poll + Add quiz		54
DASHBOAR 2)LLS		Add Poll Survey
	Туре	
Survey Details		

- 3. Click to add multiple choice question
- 4. Click the 'Edit question' icon
- 5. Click in the box to type your question
- 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
- Go back to step 2 to add additional questions. When finished click 'Save'



## 7.6.3 Add a Quiz (True or False Question)

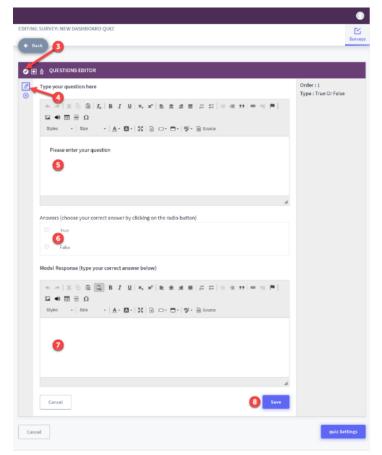
1. Click 'Add quiz'



2. Click 'Edit' to add question

	Sur
	Add Quiz Survey
Туре	
quiz	

- 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)

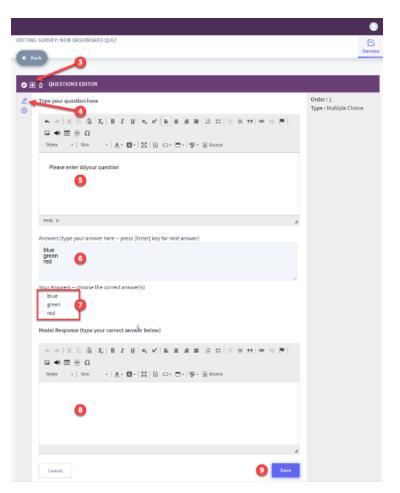
1. Click 'Add quiz'



2. Click 'Edit' to add question

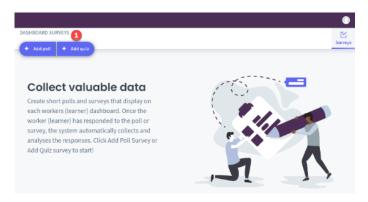
Add poll 🔶 Add quáz		s
DASHBOARD C 2 FES	Add Quie So	ivey
Survey Details	Тури	
Author: Created on:07-01-2022	quiz	

- 3. Click to add multiple choice question
- 4. Click 'Edit question'
- 5. Click in the box to type your question
- Click in the box to type your answer. Press the [enter] key to type the next multiplechoice 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)

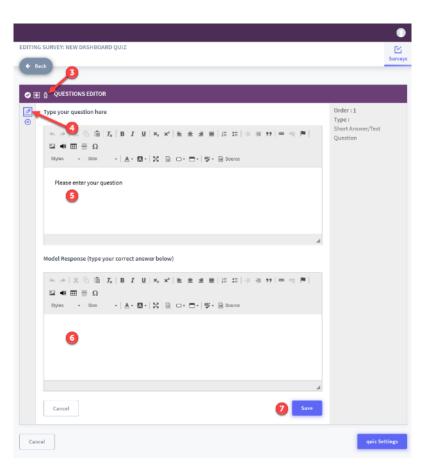
1. Click 'Add quiz'



2. Click 'Edit' to add question

SHBOARD SURVEYS	[ Sur
DASHBOARD 2215	Add Quit Survey
Survey Details Type	
Author: quiz Greated on: 07-01-2022 quiz	

- 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'

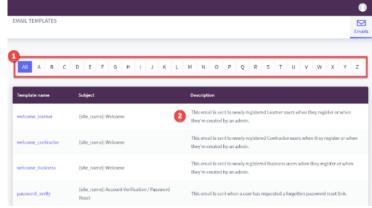
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•	Poll	
	Question Order	
	Present all questions in order as created	*
	Change Status	
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	Human Resources	
	People Skills	
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Survey Details	Туре	
Author:	llog	
Created on: 06-01-2022	poll	

# 8 Administration

# 8.1 Email Templates

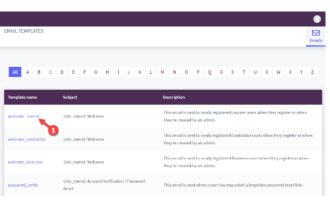
Email templates are pre-created emails that the platform automatically sends once an action has been triggered. For example, you can automatically send a welcome email to a new user. All templates can be edited if you need to change the wording.

- 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

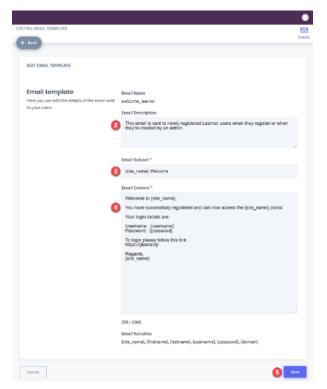


## 8.1.1 Editing an Email Template

1. Click on the template name



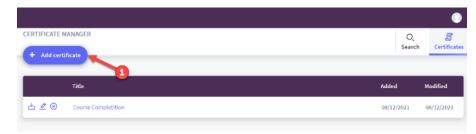
- 2. Only administrators can view the email description. **It is advised that this text isn't changed**
- Only edit the email subject text. Don't edit the code, which is anything in brackets or directly after the brackets {} for example {site\_name}:
- Only edit the email content text. Don't edit the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



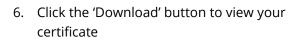
# 8.2 Certificate Manager

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
- 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'



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# 8.3 Group Branding

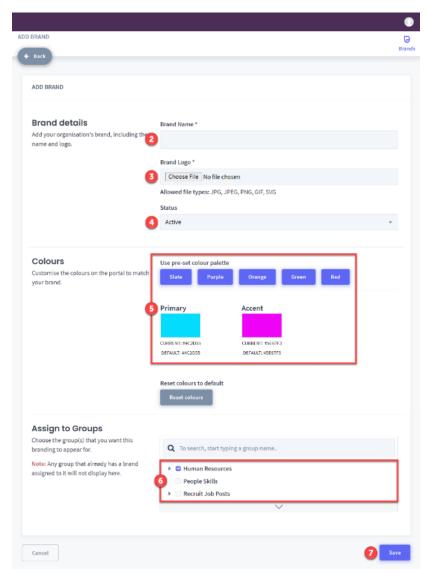
1. Click 'Add brand'

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



- 2. Add a brand name
- 3. Click 'Choose File' to upload a brand logo from your hard drive
- 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'

AINING RECORD	E List Records	Add / Edit Trainir
TRAINING RECORD		
Each training activity that you complete will be added to your Training Record. To add an required details. It will be added to your Training Record once approved.	n external training activity, click 'Add Traini	ngʻand fill in the
1st January 2022 - 31st December 2022	▼ Print All Rec	ords
Watch your training		
record grow		el
This feature allows you to give your Manager a comprehensive insight into all your internal and		<u>il (</u>
external training activities. To start adding external training activities to your digital training record, press the Add/Edit Training button.		

- 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'

					۹ 🛦 🕕
ADD TRAINING				List Records	🖳 Add / Edit Trainin
Date	Description	Documentation (Maximum file size: 500 MB)	Status	Edit/De	elete
02	Activity 3	Choose File No file chosen		<b>5</b> Ad	ld
Cancel					

# 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

by clicking in the text box

by clicking in the text box

8. Click 'Save' to save changes

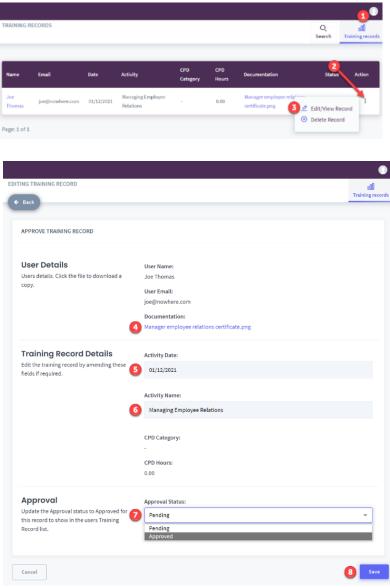
select 'Approved'

7. To approve the training record,

click in the drop-down box and

5. Edit the activity date (if required)

6. Edit the activity name (if required)



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
- Click 'Delete record'. The Training Record will now be deleted from the user's portal

TRAINING R	ECORDS						Q Search	oOD aining record
Name	Email	Date	Activity	CPD Category	CPD Hours	Documentation	Status 🔁	Action
Joe Thomas	joe@nowhere.com	01/12/2021	Managing Employee Relations	-	0.00	Manager employee relations certificate.png	Approved	÷
Joe Thomas	joe@nowhere.com	10/01/2022	Certificate iv in work health and safety		0.00	Certificate iv in work bestus	Edit/View Reco	rd
Thomas Page: 1 of 1	heiling	LOJ O AJ LOLL	health and safety		0100	<u>v</u>	Edit/View Reco Delete Record	rd

#### 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'

USER ACCOUNTS		Admin Permis	utions temp	ort/Export = For	13 ma & Labela *	G Buy More Users	More
Q. Search I	Showing 4 of 4 Users			Sort	by Last nam	1e A-Z -	f Filler
User type	User account	Login name	Groups	User type	Status	Last login	
<ul> <li>All user types</li> </ul>	The second second	Contraction of the	1000			10000	
O Admin	Butiness Business	business		Business	Active	a day ago	I
O Manager							
O Business	Manager Manager	manager *		Manager	Action	a day ago	:
Worker (Learmer)							
Candidate	Learner Learner	learner *		Worker (Learner)	Active	a day ago	1
Status	0						
All statuses	Admin Admin	admin 🔻		Admin	Active	a day ago	i
C Active							
Disabled	Page: 1 of 1						

- 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).

Back				
ADD USER				
Account details	User Type *	Permission Sch	eme (Edit) Statu	s*
Select the type of user you want to create	Admin 🕒	- Default	3 Acti	ve v
	Note: The fields below m whether or not they're lin			
General Information	Role		Title	
Provide as much detail as you can about this user.			Mr	*
			First name *	
	Last name *		Address (Line 1)	
	Last harre		Address (Line 1)	
	Address (Line 2)		Suburb / Town	
	City		State / County	
	Post code / Zip code		Country *	
			Please select	*
			Phone	
	Mobile		Email address *	

- 5. You have the option to upload a profile picture
- 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)
- 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'

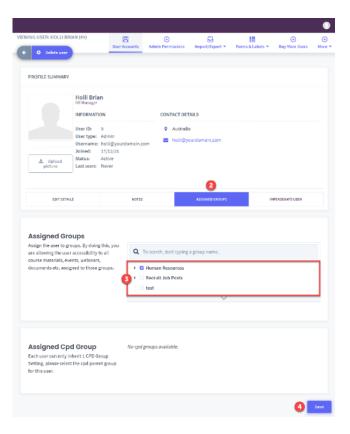
Add the profile picture for this user.	L Uplead picture
Link Accounts Create a link between two or more user	Business
accounts providing the user the ability to easily switch between accounts from the	*
menu in the top bar.	Manager
	÷
	Worker (Learner)
	*
Login Details Create login details for your new user (note that the username must be more than three (3) characters long).	Usemame * Password *
	Confirm Password *
	✗ Must contain 6-12 characters. ✗ Passwords must match
Assign to Groups Assign the user to groups. By doing this, you are allowing the user accessibility to all course materials, events, webinars,	Select Group Q. Huj
documents etc. assigned to those groups.	Human Resources
Cancel	9

# 8.6.2 Assigning User Groups

1. Click on a user from the User Accounts page

+ Add user	U	E ser Accounts	Admin Permissions	₩ ImportjExport ▼	Forms & Labe	ls = Buy	⊕ • Nore Users	More
O, Search	Showing 8 of 8 Users				Sort by L	ast name A-2	Z - 1	ilter
<ul> <li>All user types</li> </ul>	User account	🤨 Login	name	Groups	User type	Status	Last login	
Admin Manager	Holl Brian	holisi	Dyourdomain.com	Human Resources	Admin	Active	Never	1
Business	John Doe	johna	loe	Human Resources	Manager	Active	Never	1
Candidate	Matt Ireland	matti	ireland	Human Resources	Contractor	Active	Never	i
<ul> <li>All statuses</li> </ul>	Natt Ireland	matti	@powerhousehub.com		Admin	Arthe	7 hours ago	1
Active     Disabled	Buriness Bur	inna busin	10.5		Business	Active	13 daysago	

- 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.

+ Add user		User Accounts	October State	Import/Export +		E Labels Ŧ	Buy More Users	More *
O Search	Showing 8 of 8 Users				Sort by	Last na	me A-Z 👻 🔽	Filter
<ul> <li>All user types</li> </ul>	User account	Login n	ame	Groups	User type	Status	Lastingin	
All user types     Admin     Manager	Holli Brian	holli@j	yourdomain.com	Human Resources	Admin	[	Edit user	•
Business	John Doe	john.de	pe	Human Resources	Manager	2 🛛	Impersonate user	:
Candidate	Matt Ireland	l matt.ir	eland	Human Resources	Contractor	Active	Never	1
All statuses	Matt Ireland	l mattig	powerhousehub.com		Admin	Active	8 hours ago	ı
O Active	Business Bu	isiness busine	55		Business	Active	13 days ago	1
	Manager Ma	anager manag	er 🔻		Manager	Active	13 days ago	I
	Learner Lea	mer learner	-		Worker	Active	13 days ago	I
	Admin Adm	in admin	•		Admin	Active	13 days ago	

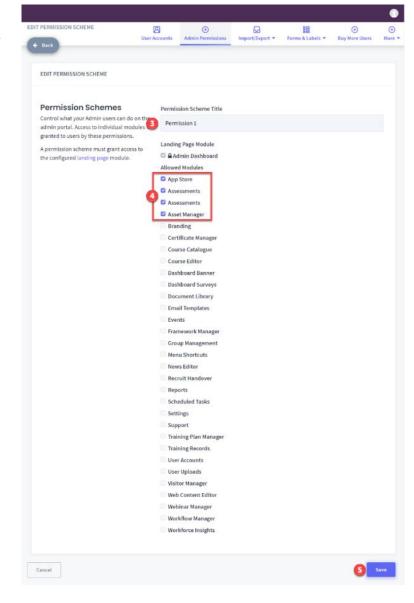
#### 8.6.4 Admin Permissions

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'



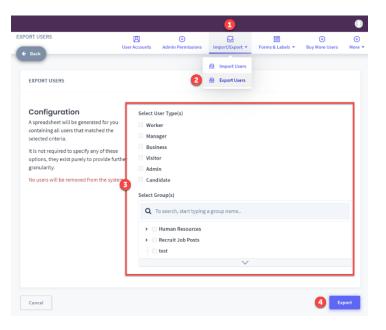
The permission scheme you just created can be assigned when adding an admin user type (shown in the image below).



# 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.

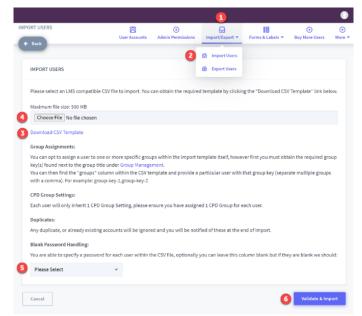
- 1. Click the 'Import/Export' drop-down box in the top menu panel
- 2. Click 'Import Users'
- 3. Download CSV Template and fill out the form with all user information
- 4. Upload completed CSV
- 5. If you haven't added a password for each user in the CSV, select an option from the drop-down box
- 6.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

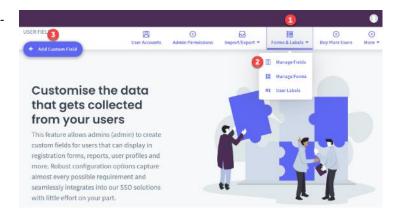
- 1. Click 'Import/Export'
- 2. Click 'Export Users' from the drop-down box
- 3. Select the relevant user type(s) and group(s) that they are associated with
- 4. Click 'Export'



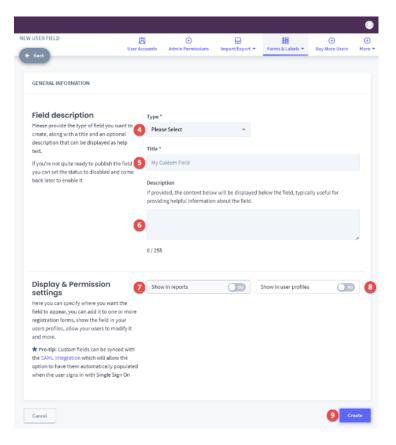
## 8.6.7 Manage Custom Fields

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 dropdown box
- 3. Select 'Add Field'



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

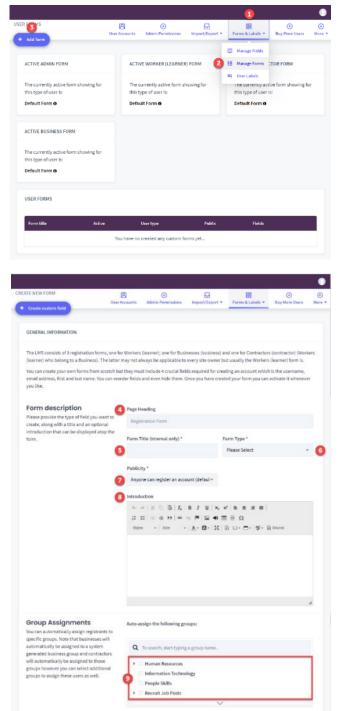


#### 8.6.8 Manage Forms

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

➡ Add	4 Standard Field + Add Custom Field	_
		12
	Role	0
		13
	Title	1
1	Mr	· 0
	First name *	
1		1
1	Last name *	1
:	Address (Line 1)	1
		8
	Address (Line 2)	/
I		8
ł	Suburb / Town	/ 0
1	City	1
-		節
	State / County	
1		P
1	Post code / Zip code	/
		u
1	Country *	1
	Please select	* 0
	Phone	1
1	■ +61 * 2 1234 5678	0
		\$
:	Mobile	✓
	<b>412 345 678</b>	0
	Email address *	
1		1
	lumme 2	
1	Usemane *	1
	Password *	
	Confirm Password *	
1		
	Must contain 5-12 characters     Passwords must match	
:	Terms & Conditions *  I have read and agree to the terms and conditions.	1

#### 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'
- 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

€ Back	r Accounts Adm	in Permissions	Import/Export *	Forms & Labels 🔻	€ Buy More Users	
				nage Custom Fields nage Forms		
User Labels You can modify the labels that are used to	User Type	Singular Name	2 RZ Us	er Labels 👌		
represent each user type and these labels immediately appear in all areas througho the platform.	Admin	Admin		Admins		
Note: To reset a label back to it's default, leave it blank. Custom names won't be applied in Certificate variables or Email	Manager	Manager	3	Managers	3	
Template variables.	Worker	Worker		Workers		
	Business	Business		Businesses		
	Contractor	Contractor		Contractors	5	
	Visitor	Visitor		Visitors		
	Candidate	Candidate		Candidates		

## 8.6.10 Buy More Users

1. Click 'Buy More Users'

					1	•
USER ACCOUNTS	8	•	6	800	•	$\odot$
+ Add user	User Accounts	Admin Permissions	Import/Export 🔻	Forms & Labels 🔻	Buy More Users	More •

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

Back		E-commerce	i≣ Display ≠	Platform *	Developers *	A
CONTACT POWERHOUSE HUB						
Purchase Additional Accounts	First Name *		Last Name '			
Please complete the form below and one of our friendly team members will be in contact with you shortly.	Email *			Phone *		
	Number of Accounts *			*61 *	412 345 678	
	License Requirements *					
						le.

#### 8.6.11 More

1. 'Username setting' will take you to System

PowerHouse Upskill Administrator Guide - 7.3 009a

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.

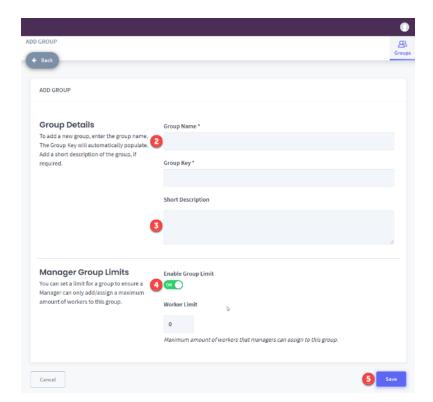
#### 8.7.1 Adding a Group

1. Click 'Add group'

	•
GROUP	Q & B Search Groups
+ Add group	
5. 11 June 11 - 11 - 1	
Build unlimited hierarchical groups	
This module allows you to add your users to	
hierarchical groups along with multiple group managers (manager). Within each group, all	
users are given access to the same courses,	
news, events and course catalogue items. Click the Add Group button to begin!	
**	
	L

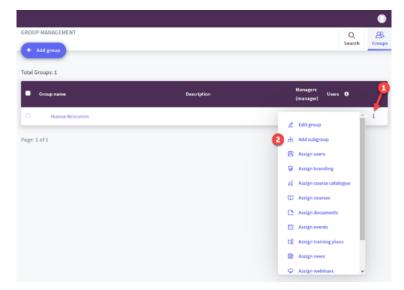
2. Add a group name and the group key will automatically populate

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

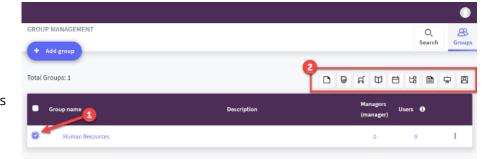


- 3. Add a subgroup name
- 4. Add a short description. This is only visible to admins
- 5. Toggle ON to enable a group limit and then enter the maximum number of workers that managers can assign to the group
- 6. Click 'Save'

		0
DD SUBGROUP		Group
← Back		Group
SUB GROUP DETAILS		
Sub Group Details	Sub Group Name *	
To add a new sub group, enter the group name. The Group Key will automatically	3	
populate. Add a short description of the group, if required.	Group Key *	
	Short Description	
	0	
Manager Group Limits	Enable Group Limit	
You can set a limit for a group to ensure a Manager can only add/assign a maximum	5 GN O	
amount of workers (learner) to this group.	Worker (Learner) Limit	
	0	
	Maximum amount of workers (learner) that managers (manager) can assign to this group.	
Cancel	6	ave

## 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

			۰
GROU	PMANAGEMENT	Q Search	8 Groups
+	Add group	ovaren	cicups
	n Items to Selected Groups (and sub-groups): an Resources, Recruitment)		
NB: T	his function only assigns selected groups to new items. It does not unassign.		
•	Title		
0	Active Listening		
	Building Relationships with Customers		
	Building Relationships with Customers		
	Empathy 3		
	HR Basics		
	Onboarding		
	People Management		
	Workplace Health and Safety		
Ca	ncel	4	Save

#### 8.7.4 Edit Group

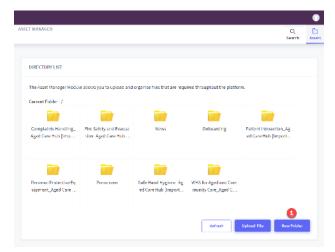
- 1. Click on the group name
- 2. Make the required changes
- 3. Click 'Save' to save changes

GROUP MANAGEMENT		Q Search Grou
Total Groups: 1		
Group name	Description	Managers Users <b>()</b> (manager)

# 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

		•
SSET MANAGER		Q D Search Assets
DIRECTORY LIST		
The Asset Manager Modul Current Folder : / News /	e allows you to upload and organise files that are required throughout the platform.	
News	nordic-walking-small.j PE DOMNLOAD SELTE	
	Refresh Upload	

# 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

CHEDULED TASKS					T
scheduled task is a job that atform.	runs at an interval automatically be	hind the scenes, the list below	shows the currently enable	d/disabled tasks	on your
Schedule	Title	Last run	Next run	0	6
Every day at 5:00am *	Course Delay	13/01/2022 05:09AM	13 hours from now	Disable	View
Every day at 5:00am *	Course Expiries	13/01/2022 05:09AM	13 hours from now	Disable	View
Every day at 5:00am *	Course ReInductions	13/01/2022 05:09AM	13 hours from now	Disable	View
Every day at 12:00am*	CPD Renewal	E3/01/2022 L2:09AM	a hours from now	Disable	View
Every day at 5:00am *	License Expley	13/01/2022 05:09AM	13 hours from new	Disable	View
Once every 1 hours *	News Emailer	13/01/2022 03:03PM	1 minute from now	Disable	View
Every day at 5:00am *	Program ReInductions	13/01/2023 05:00AM	13 hours from now	Disable	View
Every minute *	Queued Jobs	13/01/2022 03:58PM	10 seconds from now	Disable	View
Every 15 minutes *	Recruit Sync	13/01/2622 03:49PM	3 minute from now	Disable	View
Every day at 5:00am *	Workflow Reminders	13/01/2022 05:09AM	13 hours from now	Disable	View

\* Tasks are intended to handle large time-consuming jobs more so than what a browser is patient enough to wait for, therefore you are unable to run these tasks manually on production servers.

# 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'

EB CONTENT EDITO	0							1											
CONTENT EDITO	R							List pa	Res	Con	က nmunit	ies	Sul	r bmit :	sitema	D	Slide	how r	manage
+ Add page X	Re-order pages						-												
All A B	CDEF	з н	IJ	К	L.	м	Ν	0	Ρ	Q	R	s	т	U	٧	W	х	Y	z
<b>P3P9</b>	Title											S	tatus	4	Date	Modi	fied		
₂₽₽∎ <mark>₽</mark>	Home											P	ublist	red	July	28, 20	15 11:0	IS AM	
┛┇╠▤⊗	Privacy Policy											P	ublish	ned	Jani	Jary 2	5, 2022	02:45	PM
	Terms											P	ublish	had	Dore	mbor	16,203	0 11-5	MAR

## 10.1.1.1 Adding a new page

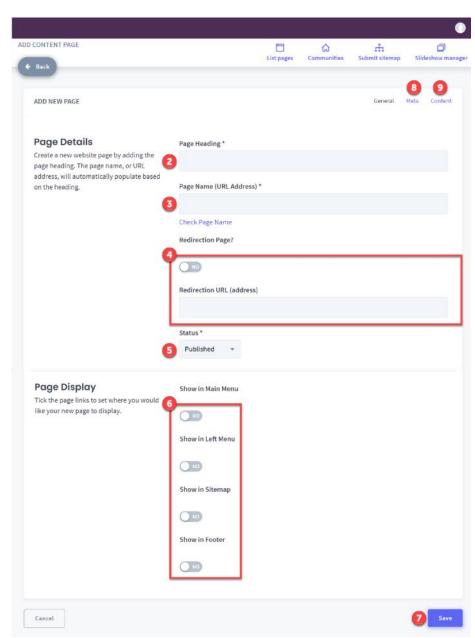
#### 1. Click 'Add page'

B CONTEDIT	DR							List pa		6.00	ل nmuni	these	<b>C</b>	н	- sitema	4	clide	show	
+ Add page	戈 Re-order pages						1	List pa	iges	Cor	nmuni	ties	50	IDMIC 3	stema	P	Stide	snowi	nana
All A B	C D E F	G H	T	J	к	LM	N	0	Ρ	Q	R	s	т	U	v	W	х	γ	z
	Title											-	Status		Date	Modif	ied		
2 및 比 🗐	Title Home												Status Publis		2010/200		ied 15 11:0	08 AM	
2 및 է♀ ≣ 2 및 է♀ ≣ ⊗	101893													hed	July	28, 20	15 11:0	08 AM 02:45	PM

- 2. Add a page heading
- 3. Type the URL of the page
- 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.
- 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

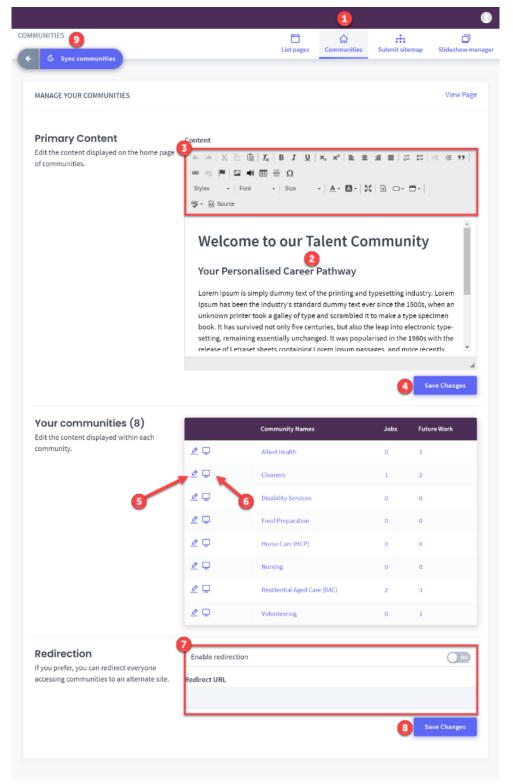
- Click the 'Meta link' to add meta keywords and meta description
- 9. Click the 'Content' link to populate the page content



## 10.1.2 Communities

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

- Click the 'Communities' tab to go to the home page
- Click in the CK Editor to edit the introduction text
- 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
- Click the 'View page' icon to view the frontend of the community
- Toggle Yes to enable a redirection and type in the redirection URL (if required)
- 8. Click 'Save Changes'
- Click 'Sync communities' to update all changes on the frontend



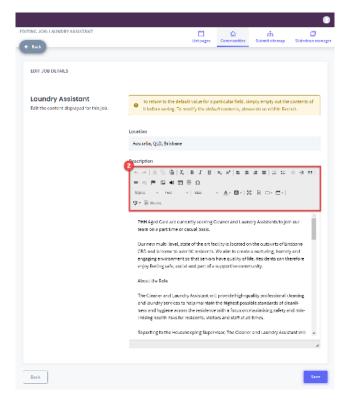
#### 10.1.2.1 Styling a Job Post

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

		List pages	Communities S	rh Submit sitemap	Slideshow mar
OMMUNITY HOME					
Cleaners dittine content displayed for the pages of his community. If you wish to update the name or description of this Community you can do so in Resnit.	(dusting, sweeping Banner Content This content is disp	Hes factude: Cleaning, a vector interpret of the bann $\mathbb{R} \mid \mathbf{X}_{t} \mid \mathbf{B} \mid \mathbf{I} \mid \mathbf{U} \mid 1$ $\mathbf{A} \in \mathbb{R} \oplus \Omega$ at $2\mathbf{z}_{2} \rightarrow \mathbf{U}$	leaning ceiling vent er within each com ×, ×* 生 主 主 :   <u>▲</u> ~ 四 ~   55	nunity page.	ning etc) - (1 本 99 )
	Jobs	sy jobs differently within			
	can modify them in		Location		ype
	1 2	Laundry Accistant	Austrolla, QLD, B	idsbanc I	Future Job
	0				
	<u>v</u>	House Reeper	Australia, (): 0, 8	rishane I	infine Inb

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.

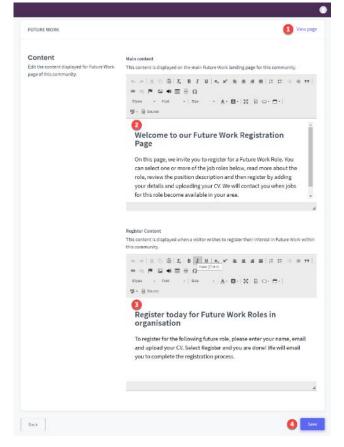
- 1. Click 'View page' to be taken to the page you are editing
- 2. Click the box (use the CK Editor if necessary) to change the content that is displayed on the main jobs landing page for this Community
- 3. Click the box (use the CK Editor if necessary) to change the content that is displayed when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

PAGE CONTENT	3 View page
Jobs Content Edit the content displayed for Jobs page of this community.	Main content This content is displayed on the main Jobs landing page for this community. $\begin{array}{c c} \Rightarrow   X & \bigcirc & \square & X & \square & I & \square & X, x^*   X & X & \square & \square & I & I &   x & y^*   \\ \Rightarrow & \Rightarrow & \square & \square & \blacksquare & \square & \square & \square & \square & \square & \square &   \\ \hline & \Rightarrow & \square & \square & \blacksquare & \square & \square & \square & \square & \square & \square & \square$
	Apply Content This content is displayed when a visitor wishes to submit 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

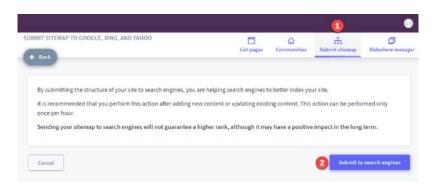
- 1. Click 'View page' to be taken to the page you are editing
- 2. Click the box (use the CK Editor if necessary) to change the content that is displayed on the main future work landing page for this Community
- Click the box (use the CK editor if necessary) to change the content that is displayed when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



## 10.1.3 Submit Sitemap

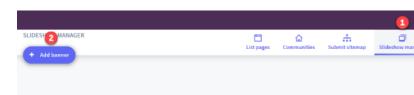
By submitting the structure of your site to search engines you are indexing it in a better way. It is recommended that you perform this action after adding new content or updating existing content. This action can be performed only once per hour. Sending your sitemap to the search engines will not guarantee 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

Back		List pages	Communities	Submit sitemap	Slideshows
ADD BANNER					
ADD BANNER					
Banner Enabled	Enable Banner				
Banner images will only be applied if you have set your Home Page template to Defau or E-Commerce.	3 ON O				
If template is set to Login Only / Login with Registration / Visitor, Homepage Background Image from Styling will be applied.					
Your current Home Page template: Ugin					
Banner Image	Banner Title *				
Recommended Image size: 1400 x 420 pixel	4				
	5 Show Banner Title				
	Banner File *				
	6 Choose File No file ch	osen			
	Allowed file types: JPG, JI	PEG, PNG, GIF, S	WG		
	Banner Caption				
	7				
	Title / Caption Font Color				
	0				
	Banner Link				
	billier Link billier Link billier Link	m			
	Banner Duration (Second	s)			
	10 10				
	11 Show Banner Layer				
_				_	
Cancel				•	Save

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