WEB PORTAL USER GUIDE

for ADMINISTRATORS

TalentSpring®

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Revision History

Date	Version	Description	Author
9/5/2019	1.0	First draft	E. Copp
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1/22/2021	2.8	Peer Review and accepted changes.	J. Quinto
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3/29/2021	3.0	Sustained 5 Phase Updates	E. Copp
3/29/2021	3.1	PM Peer Review	J. Quinto

Date	Version	Description	Author
12/27/2022	3.2	Sustained 6 Phase Updates Pgs: 11, 12, 31, 32, 36, 64	J. Quinto

Getting Started

Welcome to the TalentSpring® Web Portal User Guide for Administrators! From this portal, you can:

Manage

- Users & Participant Groups
- Community Boards
- Badges & Leaderboards
- Organizational Settings

Create

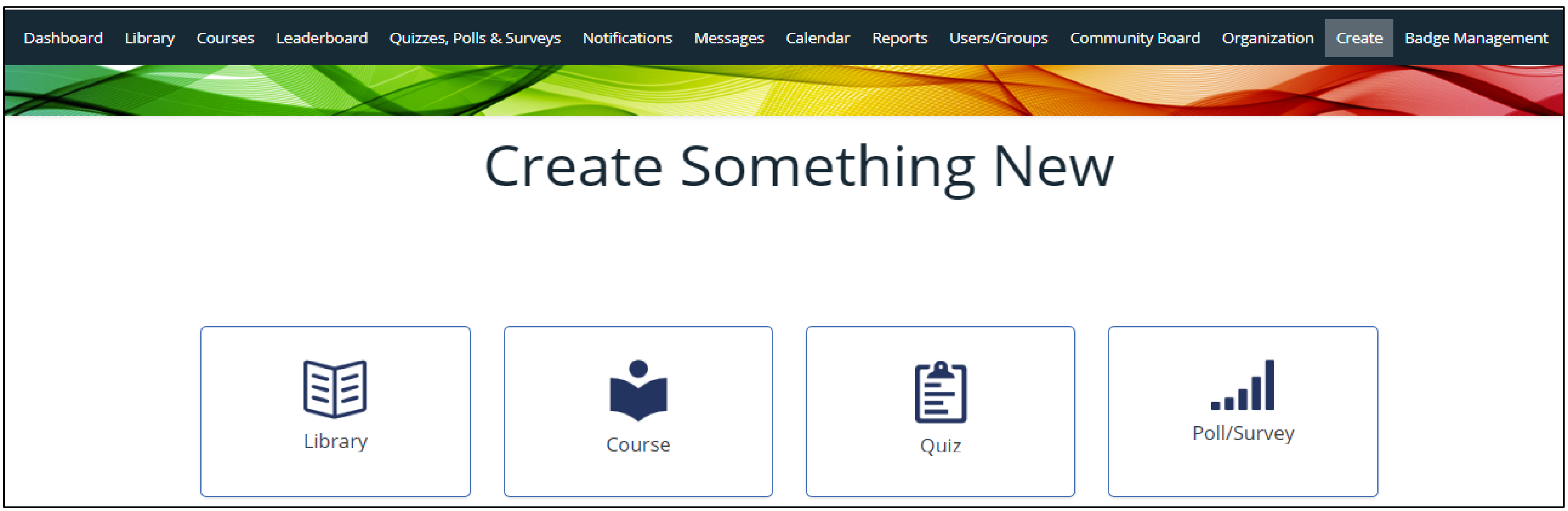
- Library & Course Categories
- Courseware
- Knowledge Base Libraries

Track

- Learner Progress & Completion Rates
- Online Assessment Results
- Poll & Survey Results
- Library Access

View or Send

- Messages
- Calendar Events & To-dos
- Notifications



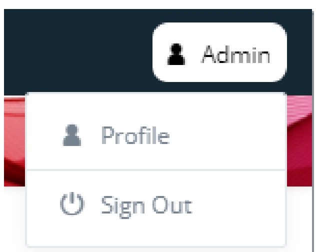
Signing In

As an administrator, you can use your credentials to sign in to the:

- **Web Portal** as an Administrator
- **Mobile Application** as a Participant

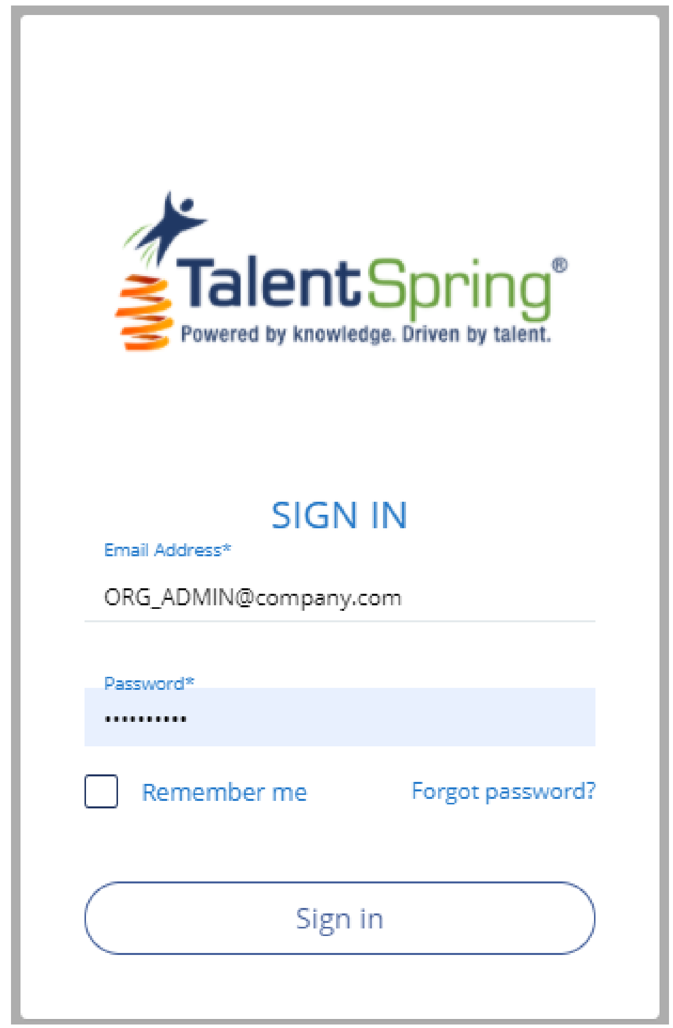
Your username will always be your email address. Once your account is activated, you will receive an email with a temporary 10-digit password. Click here to sign in to the web portal. Use Chrome or Firefox for optimal performance.

Note: Upon signing in to the portal for the first time, you can change your password from **Admin>Profile** at the top right of the screen.



Select **Remember me** to save your login credentials to your computer (email and password).

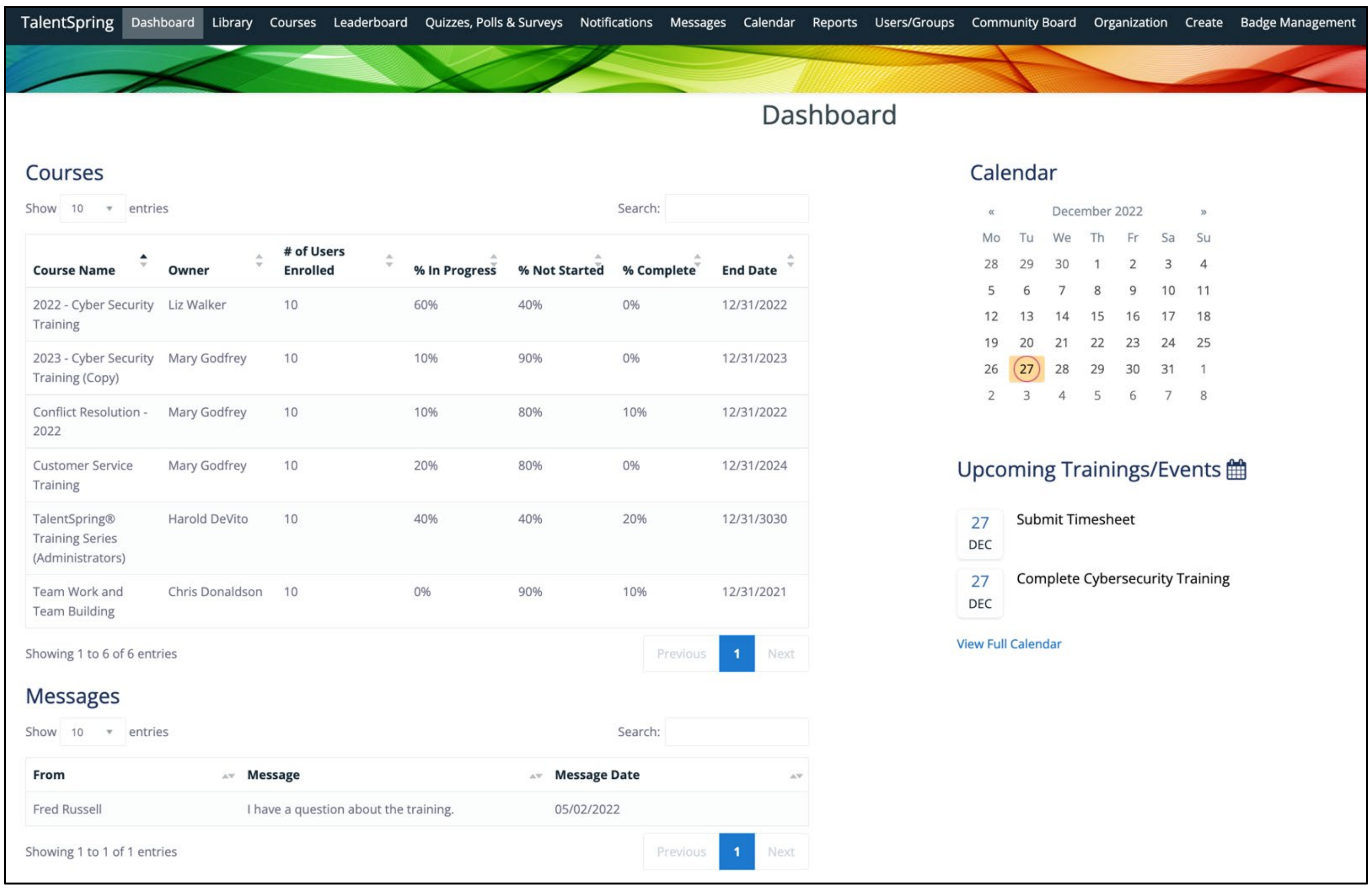
If you ever forget your password, you can click **Forgot Password** and instructions for resetting your password will be sent to your email.



Dashboard

Once logged in, you will see the **Dashboard**. From here, you can quickly access the different tools within the portal.

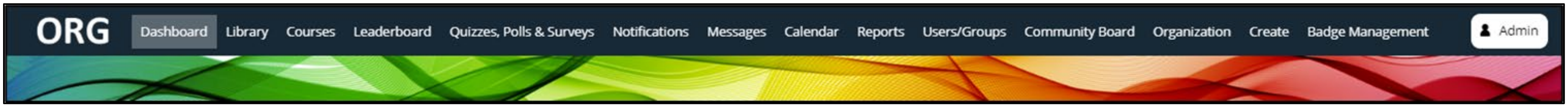
- **Courses** - provides a quick overview of your courses. Click **Courses** to go to the All Courses screen.
- **Messages** - displays recent messages. Click **Messages** or a specific message to view the correspondence on the Messages screen.
- **Calendar** - lists upcoming courses and events. Click **Calendar** to go to the Calendar screen or click on a specific date to see the events listed.



Navigation

Top Navigation Bar

The top navigation bar includes menu and sub-menu options covered in detail throughout this user guide.



Navigating Tables

Throughout the portal, you will see information presented in table format.

- The drop-down on the top left allows you to choose how many items are listed on the screen at any given time. If there are more items than are currently displayed, the bottom right navigation will display the number of pages that you can navigate using the **Previous** and **Next** buttons.
- You can search for any keyword to display items that contain the keyword in any column.
- You can sort any column by clicking on the column header. **Notice:** The small arrows (up/down) to the right of the column indicate whether the column order is ascending or descending.

Course Name	Owner	# of Users Enrolled	% In Progress	% Not Started	% Complete	End Date
2022 - Cyber Security Training	Liz Walker	10	60%	40%	0%	12/31/2022
2023 - Cyber Security Training (Copy)	Mary Godfrey	10	10%	90%	0%	12/31/2023
Conflict Resolution - 2022	Mary Godfrey	10	10%	80%	10%	12/31/2022
Customer Service Training	Mary Godfrey	10	20%	80%	0%	12/31/2024
TalentSpring® Training Series (Administrators)	Harold DeVito	10	40%	40%	20%	12/31/3030
Team Work and Team Building	Chris Donaldson	10	0%	90%	10%	12/31/2021

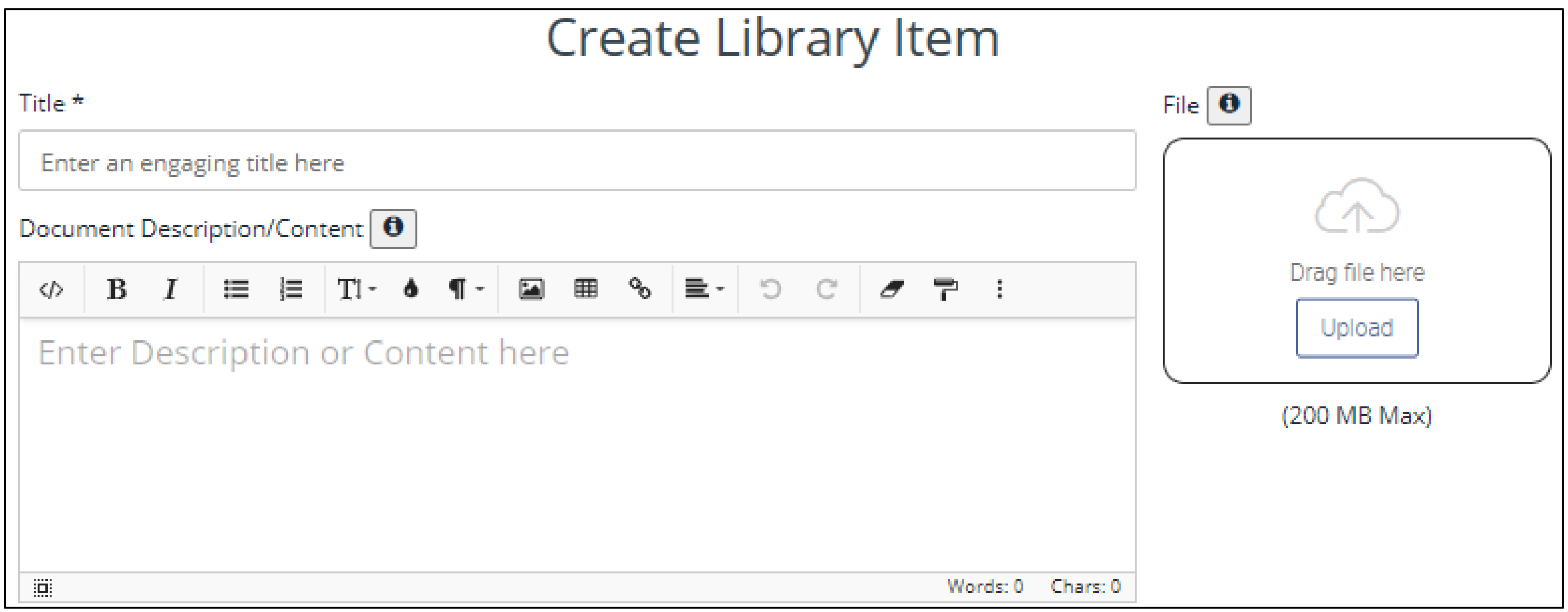
Library (Knowledge Base)

Creating a Library Item

The Library can be used in various ways. A few examples would be to use the library as a course or document repository, an area to keep all Standard Operating Procedures, and much more!

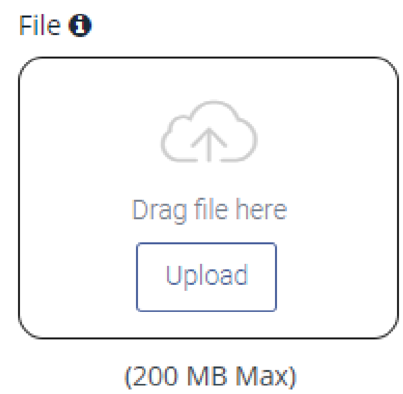
To create a library item, select **Library>Create Library Item** from the top navigation bar. **Note:** All items with an asterisk are required.

- **Title** - this is the title of the document as it will appear in the mobile application.
- **Document Description/Content** – if you upload a file, you can use this field to add a description of the uploaded file. This description will only appear in the portal. Or, you can create a document in this field. The toolbar provided will allow you to format your text and insert items such as images, videos, and links. If no file is uploaded, the content here will display as the library item content on the mobile application. **Note:** You must choose to either upload a file **or** add a Document Description/Content. Both options will not show in the mobile application.



Uploading Library Items

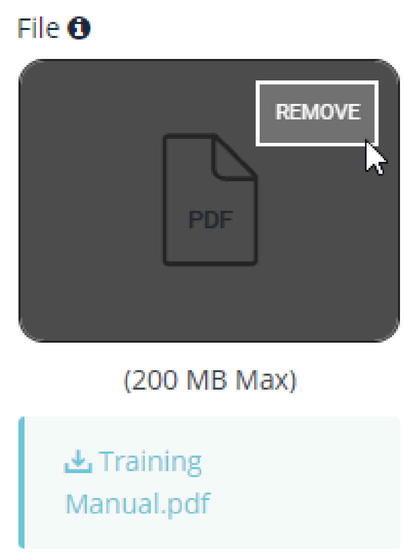
File - To upload a file, select **Upload**, browse for the file, and click on open, or, drag the file from its location to the portal. A thumbnail of your file will appear. Once saved, the file name will appear below the thumbnail with a download button. If you hover over the thumbnail, you can click **Remove** to remove or replace the file.



Note: You can download a document created by you, a Trainer, or another Administrator. Trainers cannot edit/download files that an Administrator uploads.

Notice: The maximum file size is 200 MB. Permitted library file formats include:

- Word
- PDF
- Excel
- PowerPoint
- Image files (JPEG, PNG)
- MP4



Best Practice Tip: Because Word documents are not native to Android and iOS, some features may display improperly in the mobile application. We recommend converting these to PDF.

Warning: Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.

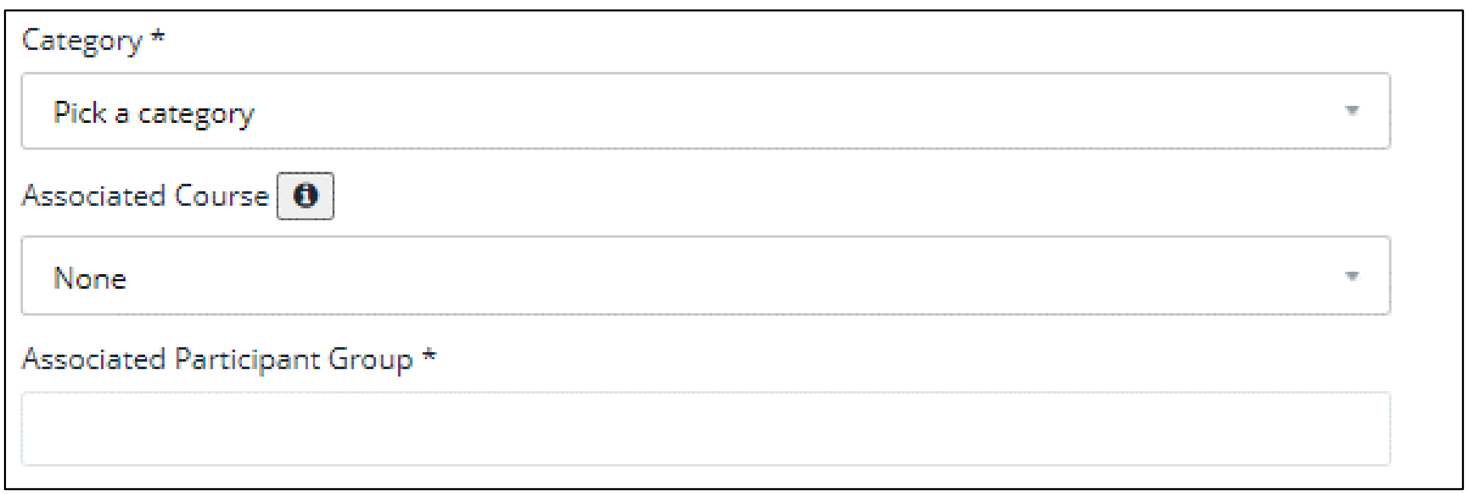
Categories & Groups

- **Category** - you must select an existing category. **Everyone** (which includes all enabled users in the organization) is a default category that is always available. Only Administrators can create categories for use by other Administrators and Trainers. **Note:** To create a category, select the **Organization>Category Setup** menu option.
- **Associated Course** - choosing an Associated Course will auto-populate the participant groups already associated with that course. To associate library items to a course, create a library Category with the course name.

Best Practice Tip: All users assigned to a course will have access to library items associated with the course. Items, such as answer keys, that are associated with the course but not available to participants, should be assigned only to those individuals that need access to these items. You can do this by creating a seperate Participant Group.

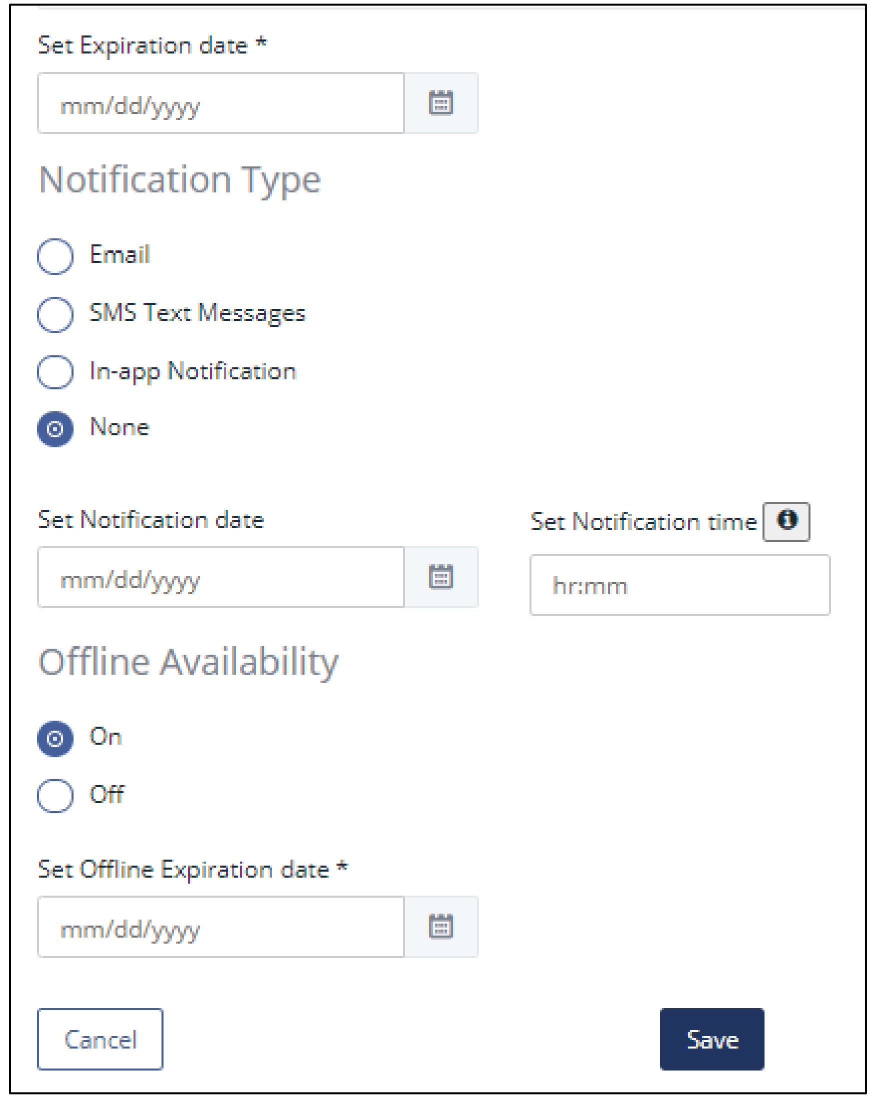
- **Associated Group** - here, you must enter one or more participant groups. To remove a participant group, click the (x). **Note:** To create Participant Groups, select the **User/Groups>Create Participant Group** menu option.

Best Practice Tip: Remember to add yourself and any assigned editor to the participant group to view the library item in the mobile app.



Scheduling & Notifications

- **Set Expiration Date** – here, you will enter the date that the library item will expire.
- **Notification Type** – you have the option to set a notification that will be sent to the specified participant group(s). If a Notification Type is selected, you must enter the date and time that the notification is sent. The time that you enter will be based on the organization's time zone.
- **Offline Availability** – you can provide mobile application users the option to download a temporary document for viewing offline. If Offline Availability is on, you must enter an expiration date.



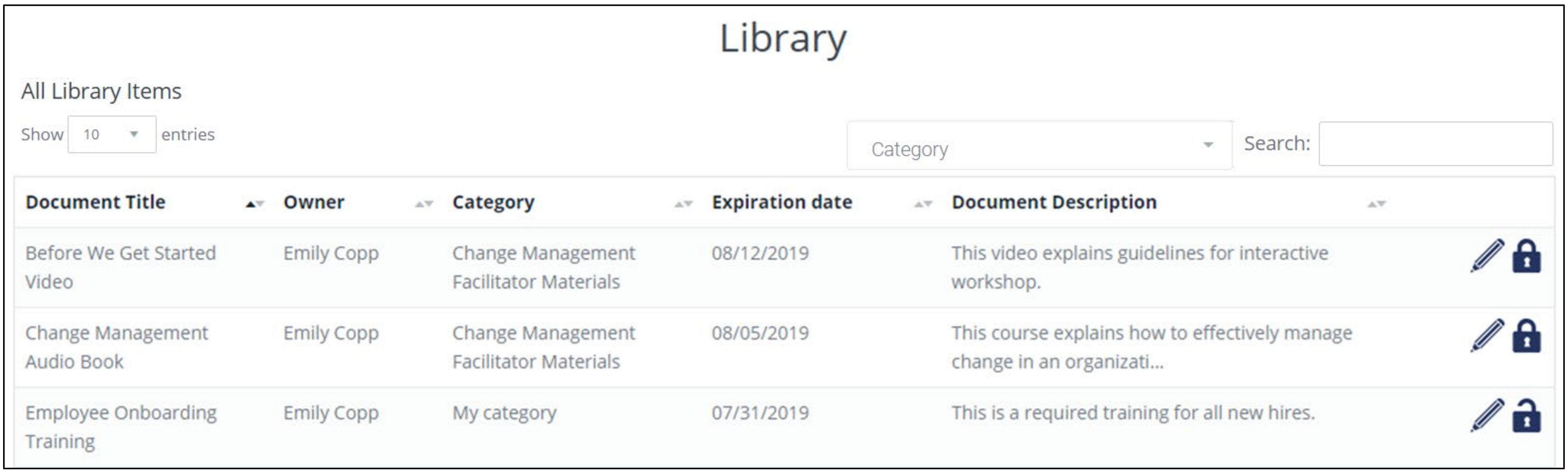
Best Practice Tip: If you add additional participants after the library item has been created, you can create a notification for the new participant group from the **Notifications>Create Notification** menu option. This is also a great option if you want to customize your message or set reminders.

Click **Save** to complete your library item.

All Library Screen

Select **Library>All Library** from the top navigation bar to view a table of all library (knowledge base) items. Column headings are:

- **Document Title** – the title given to the library item.
- **Owner** – the name of the Administrator/Trainer that created the library item.
- **Category** – the category selected when creating the library item. You can filter by category by selecting a specific category from the drop-down. Only items associated with this category will display in the list.
- **Expiration Date** – the date the document will expire and no longer be available on the mobile application.
- **Document Description** – this will display either the description for an uploaded file or the content created in the Document Description/Content field.

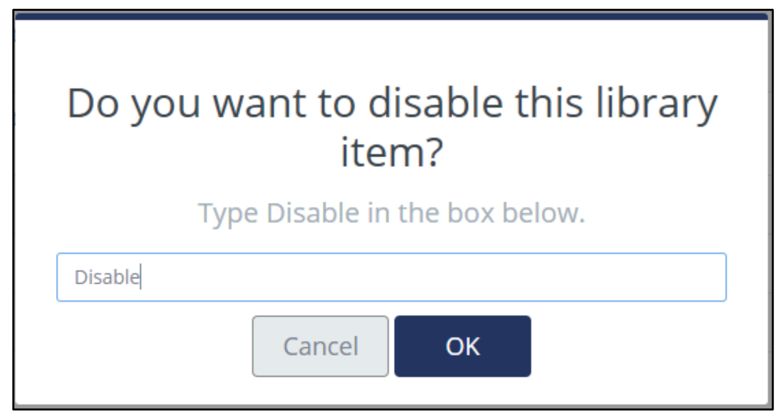


Document Title	Owner	Category	Expiration date	Document Description
Before We Get Started Video	Emily Copp	Change Management Facilitator Materials	08/12/2019	This video explains guidelines for interactive workshop.
Change Management Audio Book	Emily Copp	Change Management Facilitator Materials	08/05/2019	This course explains how to effectively manage change in an organizati...
Employee Onboarding Training	Emily Copp	My category	07/31/2019	This is a required training for all new hires.

All Library Screen – Editing and Disabling

- **Edit** – This option allows the Owner/Administrator to make edits to the library item. Clicking edit (pencil) will provide the same options available when creating a library document.
  - Organization Administrators can edit library items created by other Administrators/Trainers.
  - Trainers can only edit library items they created.
- **Disable -** This option allows the Owner/Administrator to disable a library item. This means that the item will no longer be available in the mobile application. Items that are disabled can be enabled again.
  - To disable an item:
    - Click the disable icon (lock).
    - Type the word "Disable" into the text field.
    - Click **OK**.
    - Click **OK** again when the success message appears.

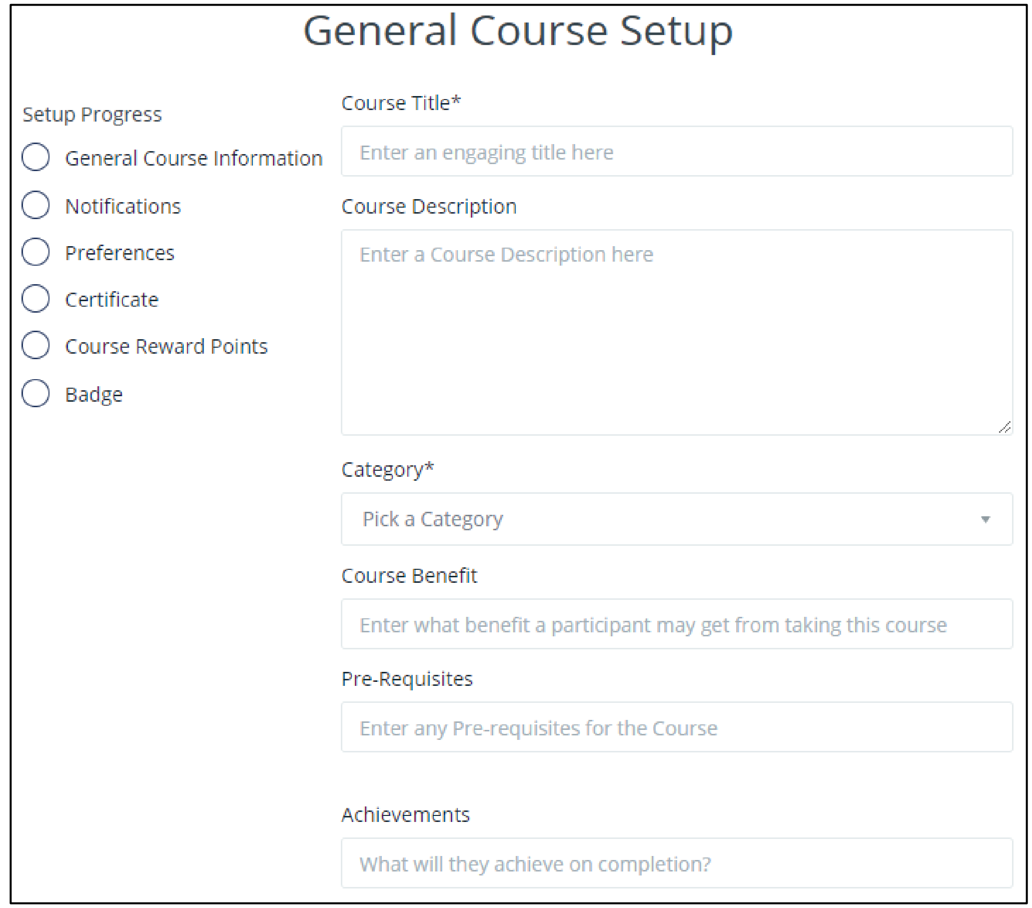
The disable icon will change to the enable icon (open lock). Click the enable icon and follow the same process to Enable.



Courses

Creating a Course

Before adding content to a new course, you must complete the General Course Setup page. You can create a new course from the **Courses>Create Course** menu option. As you are creating the course, the list under Setup Progress will indicate what section you are on. When editing the course, you can select a Setup Progress list item to jump to the associated section.



General Course Setup

Here you can configure general information about the course that will display on the course list and course welcome screens that appear on the mobile application.

- **Course Title** – the name of the course.
- **Course Description** – description of the course.
- **Category**– the name of the course category. Categories can be created from the **Organization>Category Setup** menu option.
- **Course Benefit** – benefits the participant will get from taking the course.
- **Pre-Requisites** – any pre-requisites for the course.
- **Achievements** – system achievements, such as a badge or course reward points, or any external rewards.

General Course Setup – Course Card Images

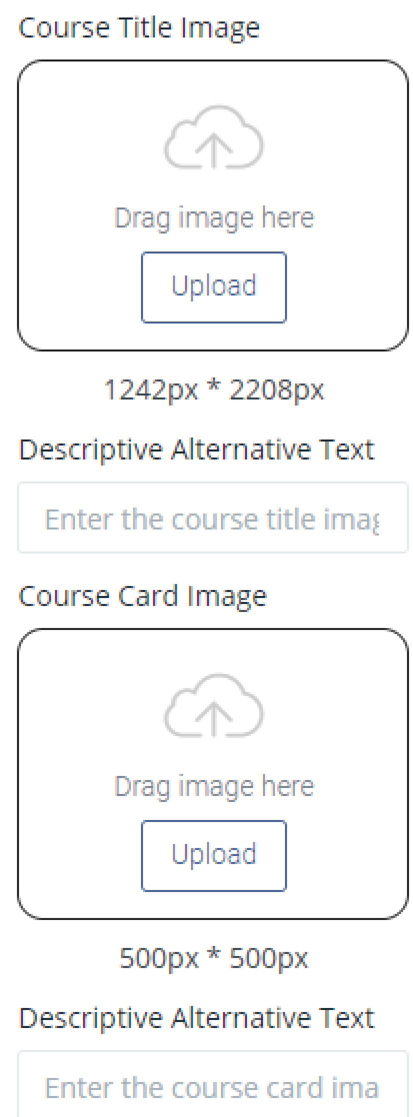
- **Course Title Image** – this image will display with a low opacity on the course welcome screen behind the text. For best results, ensure that the uploaded image is 1242 pixels x 2208 pixels.

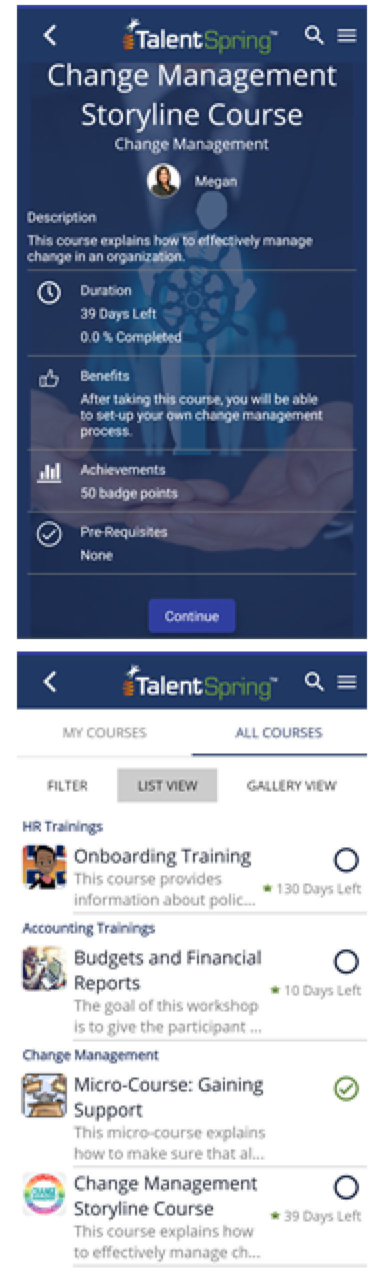
Best Practice Tip: Avoid using an image that is too light and difficult to read against white text.

Course Card Image – this image will display as an icon on the course list. For best results, ensure that the uploaded image is 500 pixels x 500 pixels.

To upload a file, select **Upload**, browse for the file and click on open, or, drag the file from its location to the portal. File formats that can be uploaded are **JPEG** and **PNG**. You can add descriptive alternative text to images for users reading with assistive technology.

Warning: Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.





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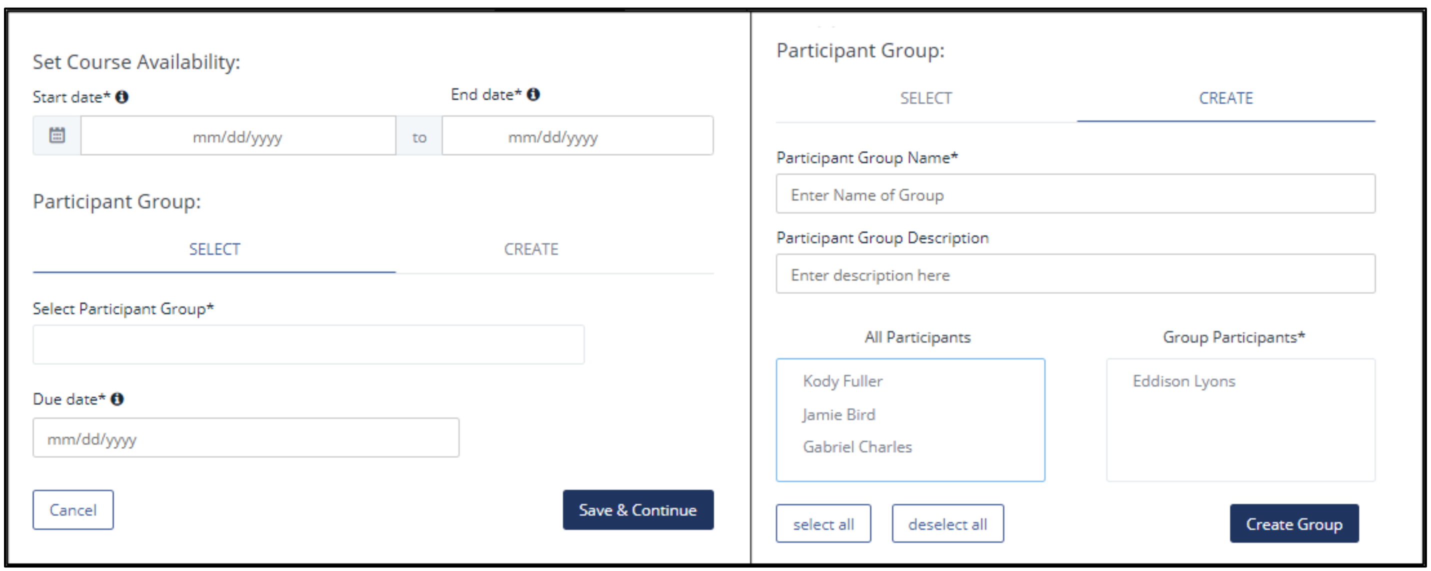
General Course Setup – Course Scheduling & Participant Groups

- **Course Availability** – the **Start Date** is the publish date of the course to the mobile application. The **End Date** is the date the course will no longer be available. **Note:** If the course has no expiration date, set a distant date (e.g., 1/1/3000).
- **Participant Group** – you can either click **SELECT** to choose an existing participant group or **CREATE** to add a new one. Enter the **Participant Group Name** and **Description**. All participants will automatically appear on the left. Select a participant to add them to your list. Select a participant from the right column to remove from the group. **Note:** Participant groups can also be created from the **User/Groups>Create Participant Group** menu option.
- **Due date** – this date will determine when the participant group must complete the course. This must be on or before the course end date.

Click **Save & Continue** to save your progress and continue to the next section. You may also cancel the course at this point.

Warning: Once Save & Continue is selected, the course will appear in the course list and can only be disabled. Courses cannot be deleted once created.

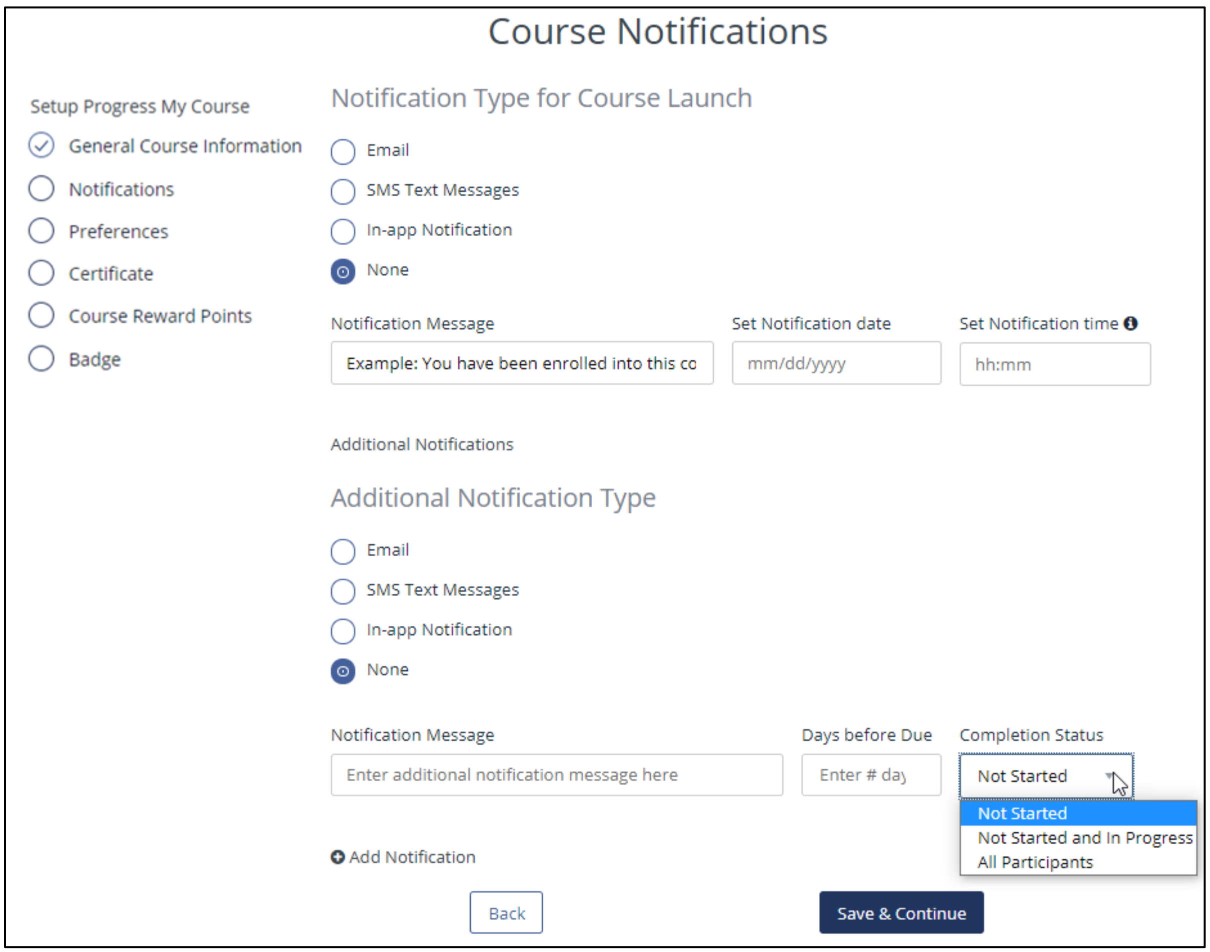


Best Practice Tip: Remember to add yourself and any assigned editor to the participant group to view courses in the mobile app.

General Course Setup - Notifications

- **Notification Type for Course Launch** – you can notify participants that the course has been launched. If a notification type is selected, you must enter a notification date and time. The time that you enter will be based on the organization's time zone.
- **Additional Notifications –** you can also schedule additional notifications if desired. You can specify when the notification will go out by entering the number of days before the due date and select Not Started, Not Started and In Progress, or All Participants to filter who receives the notification.

Note: Notifications can also be created from the **Notifications>Create Notification** menu option.

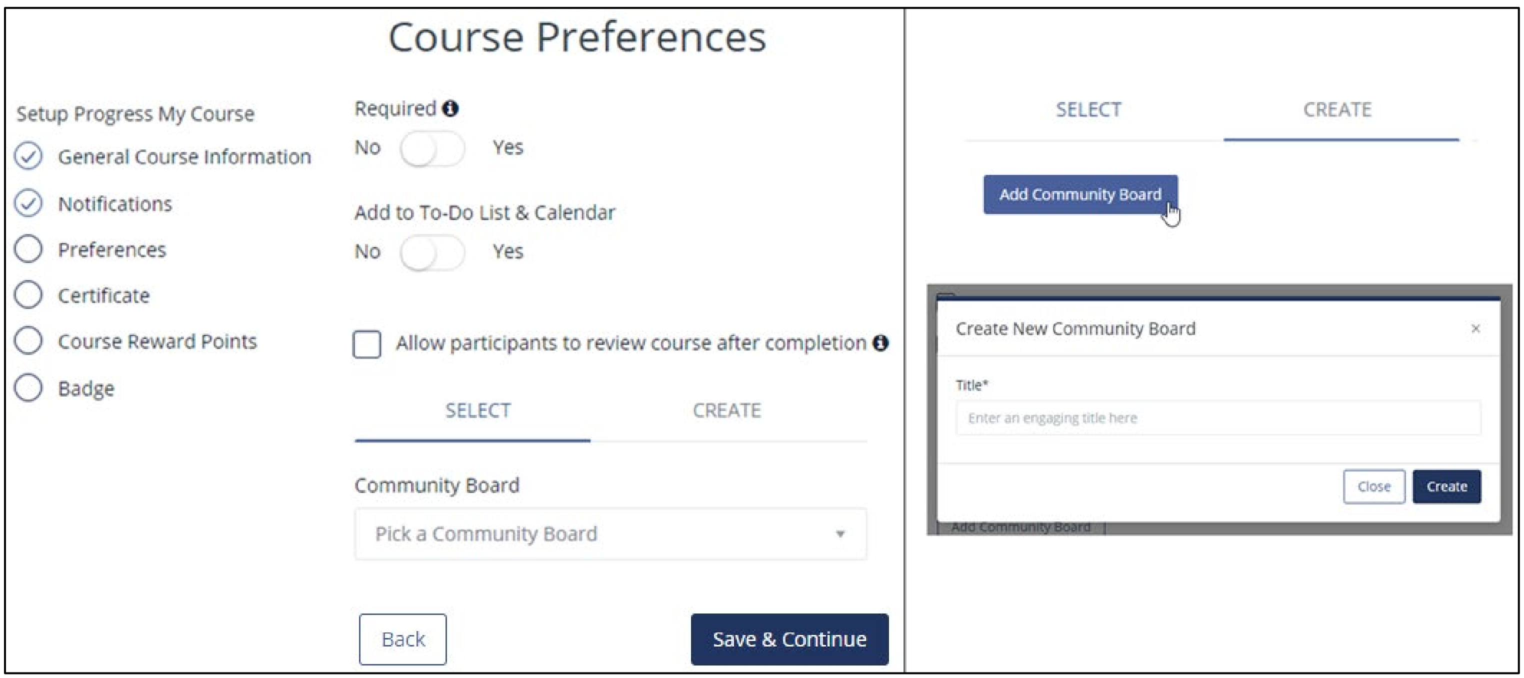


General Course Setup - Course Preferences & Community Boards

- **Required** – this indicates if the course is required. If required; this information will display on the course summary page on the mobile app.
- **Add to To-Do List & Calendar** – this will add the course to the participants' To-Do List and Calendar
- **Allow participants to review course after completion** – this option allows participants to view the course after they have already completed it. When this option is selected, participants cannot retake quizzes.

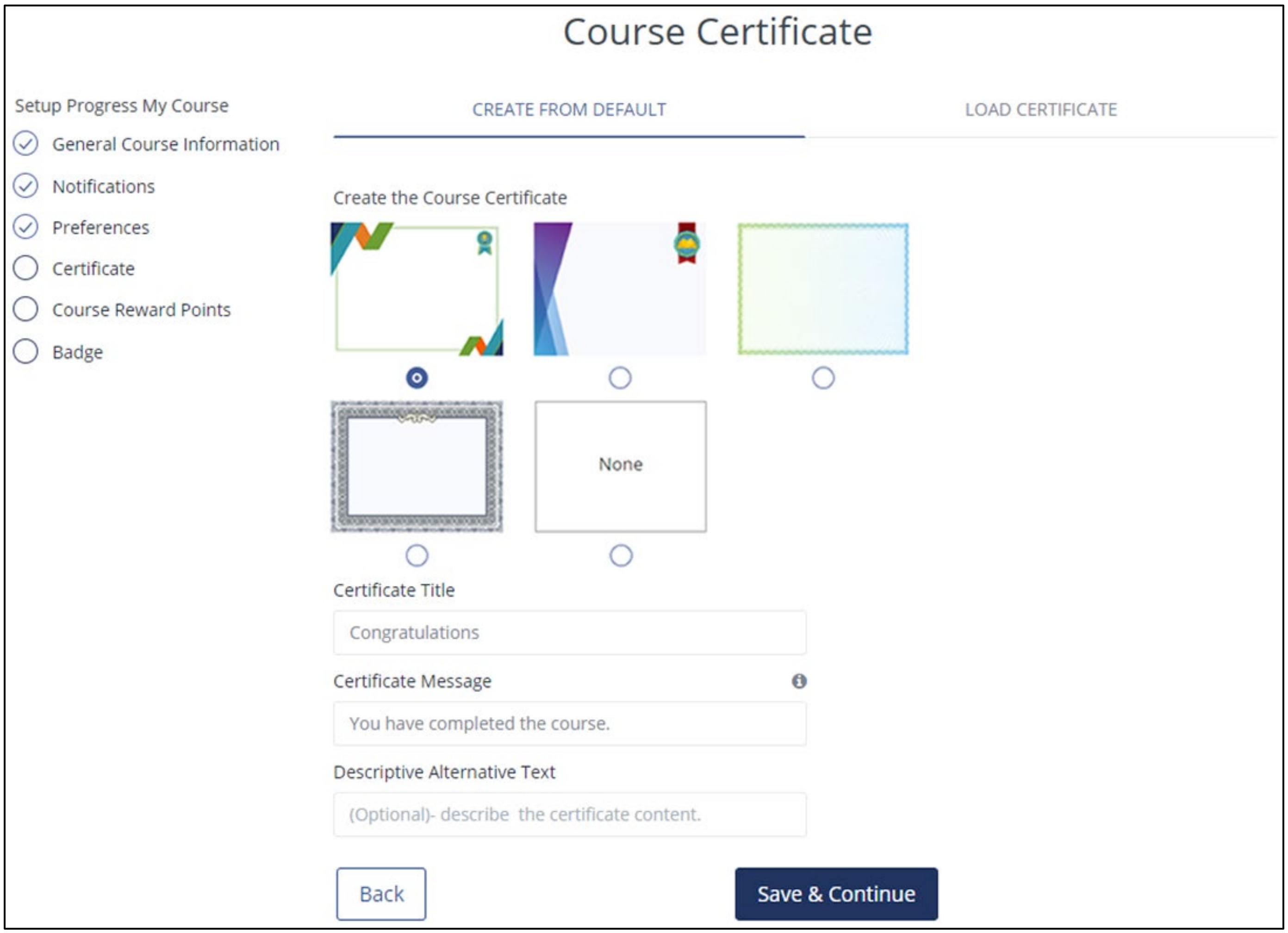
> **Best Practice Tip:** If you select this option, ensure that you add a note explaining this functionality in the **Course Description** in the **General Course Information** section.

- **Community Board –** under the **SELECT** tab, you can pick an existing community board or click on **CREATE** to add a new community board. **Note:** Community Boards can also be created and disabled from the **Community Boards** menu option – select **Add Community Board**.



General Course Setup - Certificates from Default

To add a course certificate that will be available upon course completion, select one of the templates under **CREATE FROM DEFAULT.** You can customize the Certificate Title and Certificate Message. **Note:** The date of completion and participant name will be added to the certificate automatically. You can add descriptive alternative text to images for users reading with assistive technology. If **None** is selected, the option for downloading/printing the certificate on the appliation will remain grayed out even when the course is complete.

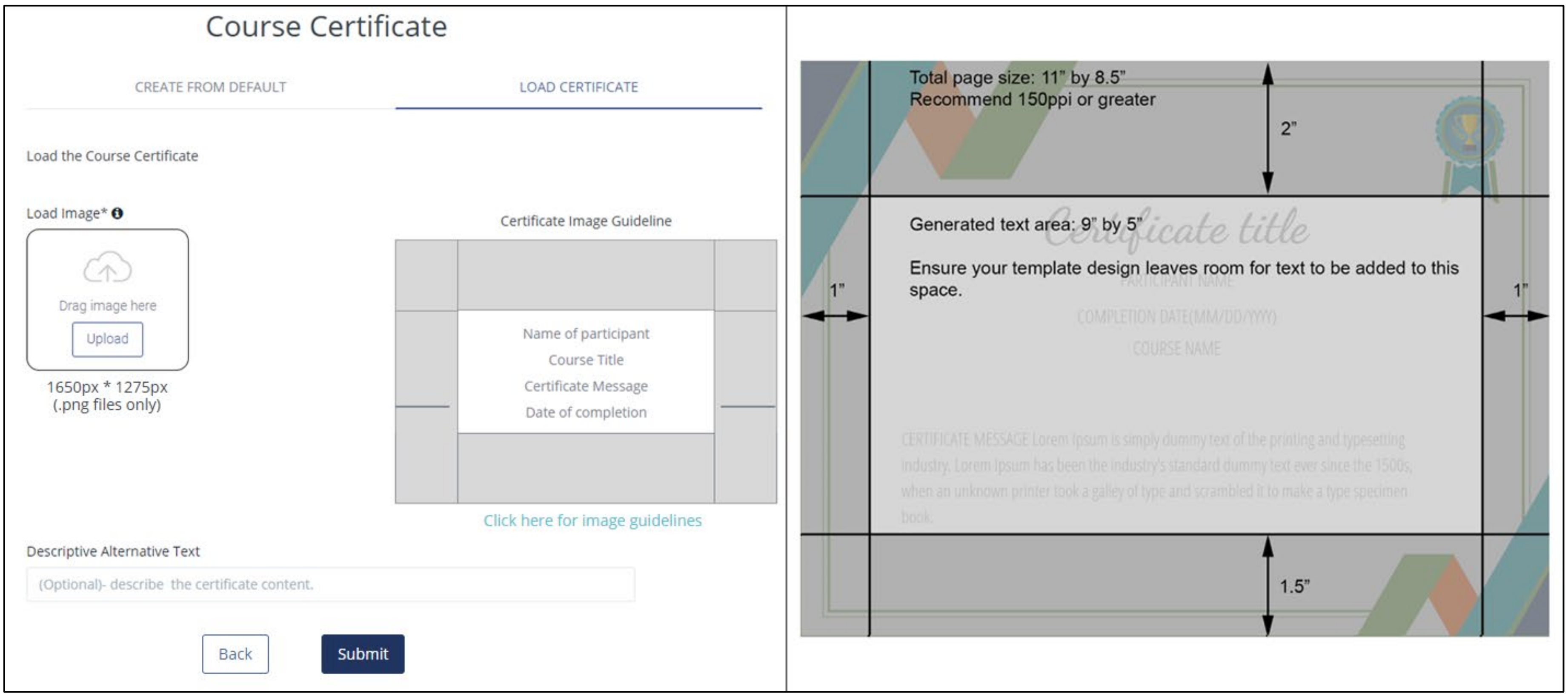


General Course Setup – Loading a Course Certificate

You may select **LOAD CERTIFICATE** to upload a custom image. To upload a file, select **Upload**, browse for the file and click on open, or, drag the file from its location to the portal. File formats that can be uploaded are **JPEG** and **PNG**.

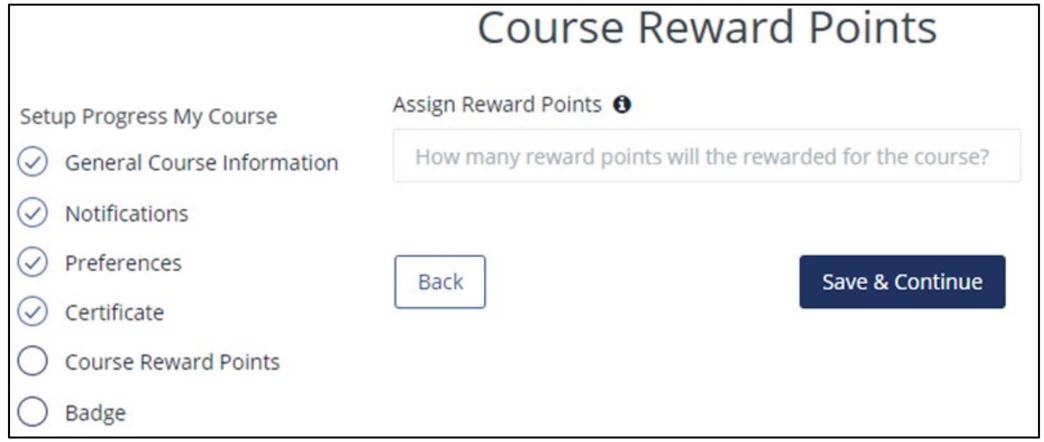
> **Warning:** Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.

For best results, ensure that the uploaded image is 1650 pixels x 1275 pixels. Certificate image guidelines are provided by clicking **Click here for image guidelines.** You can add descriptive alternative text to images for users reading with assistive technology. Once you click **Submit**, your image will be available to select from the default list where you can customize as described previously.



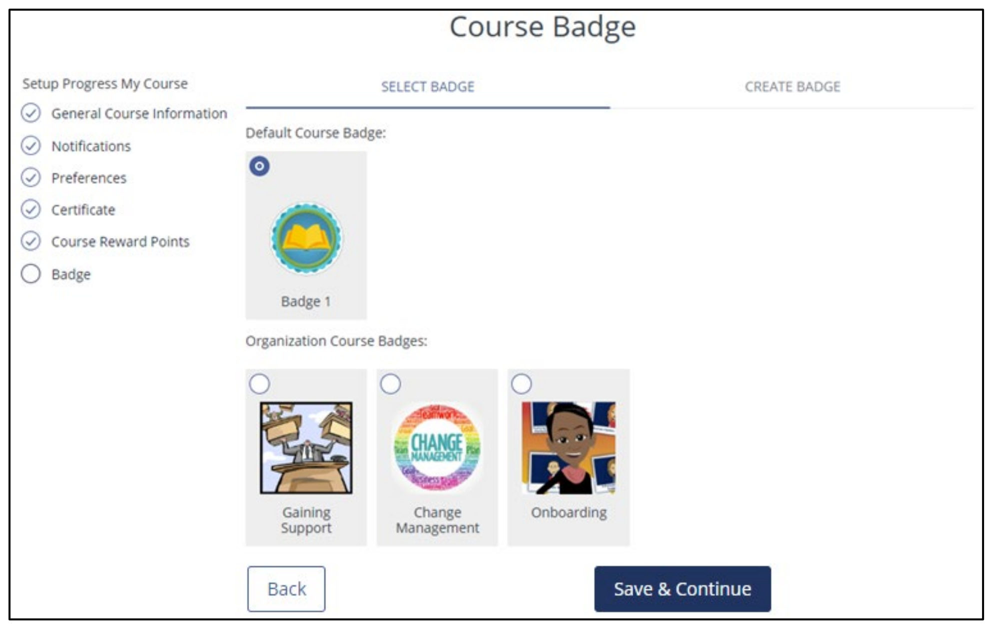
General Course Setup - Course Reward Points

As an achievement available upon course completion, you can assign reward points. Up to 150 points can be awarded per course.



General Course Setup - Badges

You can select the default badge or a badge that was created previously by an Administrator.

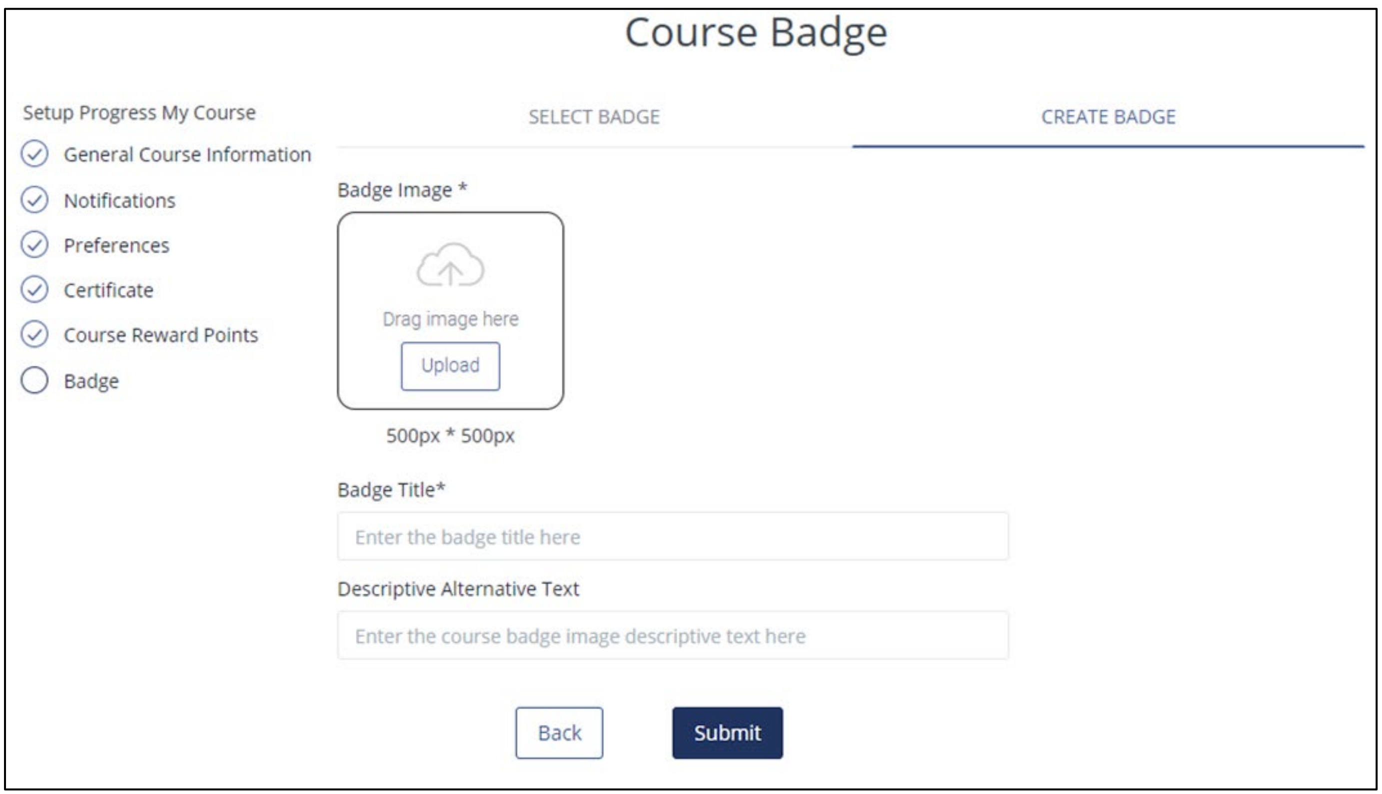


General Course Setup – Creating Badges

You may also select **CREATE BADGE** to upload a custom image. To upload a file, select Upload, browse for the file and click on open, or, drag the file from its location to the portal. File formats that can be uploaded are **JPEG** and **PNG**.

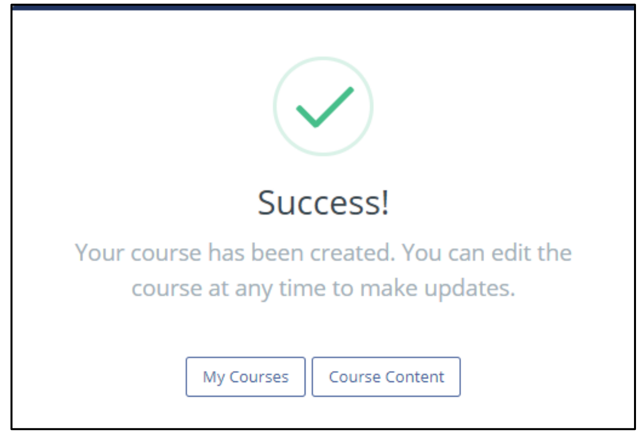
Warning: Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.

For best results, ensure that the uploaded image is 500 pixels x 500 pixels. You can add descriptive alternative text to images for users reading with assistive technology. Once you click **Submit**, your image will be available to select from the list of Organizational Course Badges for other Administrators and Trainers to use. **Note:** Badges can also be created, edited, and deleted from the **Badge Management>Organization Badge List** menu option.

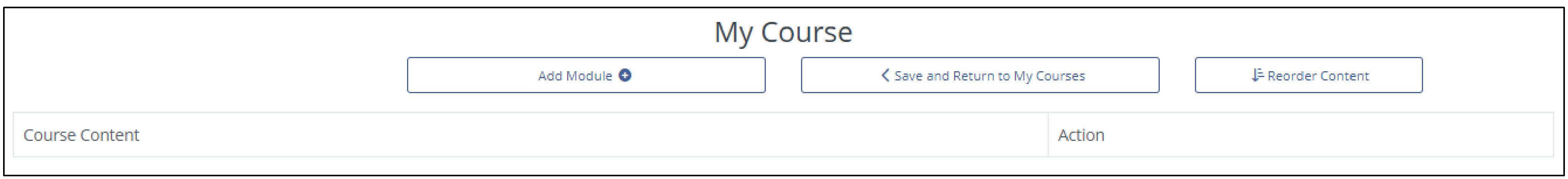


Adding Course Content

Once you have completed the Course Setup process, you can select **My Courses** to view your course list, or, **Course Content** to begin adding content to your course.



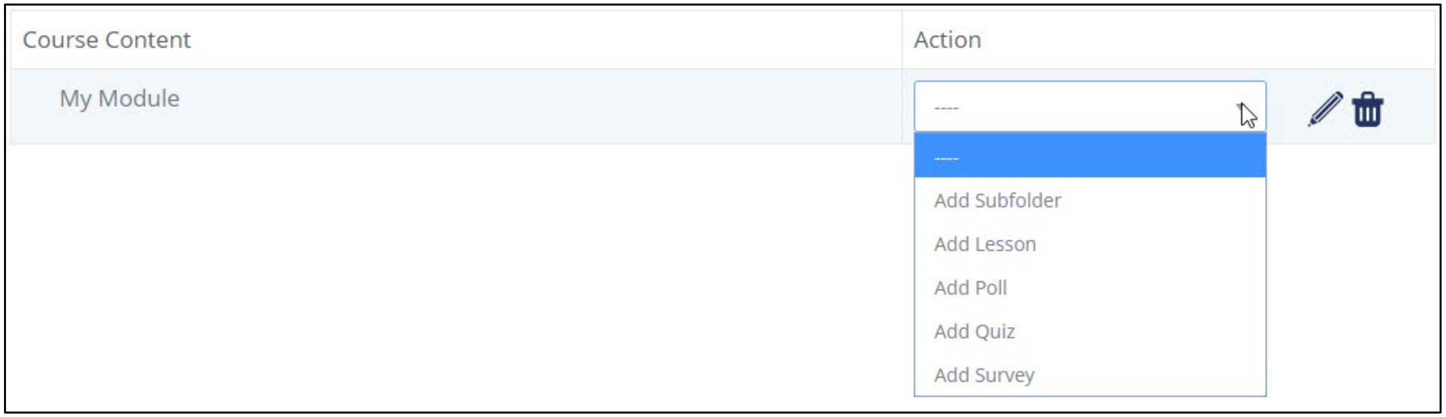
To begin adding course content, click **Add Module**, type in the Module Name, and click **Save**. **Notice:** At the top of the screen, you can go to select **Save and Return to My Courses** or **Reorder Content** to modify the sequencing of your course structure.



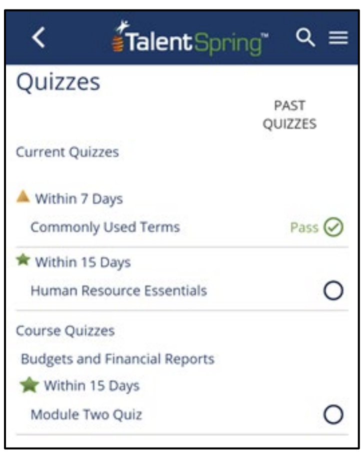
Web Portal Training Series – Reordering Course Content: Click here to see how to change the order of your course structure after it has been created. (video length – 2:15 minutes)

Course Content – Structure

Your new module will now have options listed to the right. You can select the icons to edit (pencil) or delete (trash can) the module. You can also add items such as Subfolder, Lesson, Poll, Quiz, or Survey to the module. Each item added will also have the option to edit, delete, or add items.



Any Polls, Quizzes, or Surveys added to a course will display in the course structure on the mobile application. They will also appear in the Quizzes, Polls & Surveys sections of the application listed under the course name.



Refer to the **Quizzes and Polls & Surveys** sections of this guide to see how to create these items.

Note: Course quizzes have an option to select **Must pass quiz to pass the course**. When this option is selected, if the user does not meet the pass criteria within the allotted attempts, the user will fail the course and no certificate, badge, or points will be awarded.

Best Practice Tip: If you would like to be able to track individual responses, we recommend that you build your quizzes in TalentSpring and we will be able to report that information back to you.

Course Content – Adding a Lesson

When you add an item, such as a lesson, the options for the lesson will display. There are several ways you can approach adding content.

If you want to have a lesson that serves as a container for your course structure, you can enter only a lesson name and add actual content to the substructure (subfolders, lessons, quizzes, polls, and surveys added to the lesson).

If you want to create content directly in the portal, you can use the **Lesson Content** text field to write your content. The toolbar provided will allow you to format your text and insert items such as images, videos, and links.

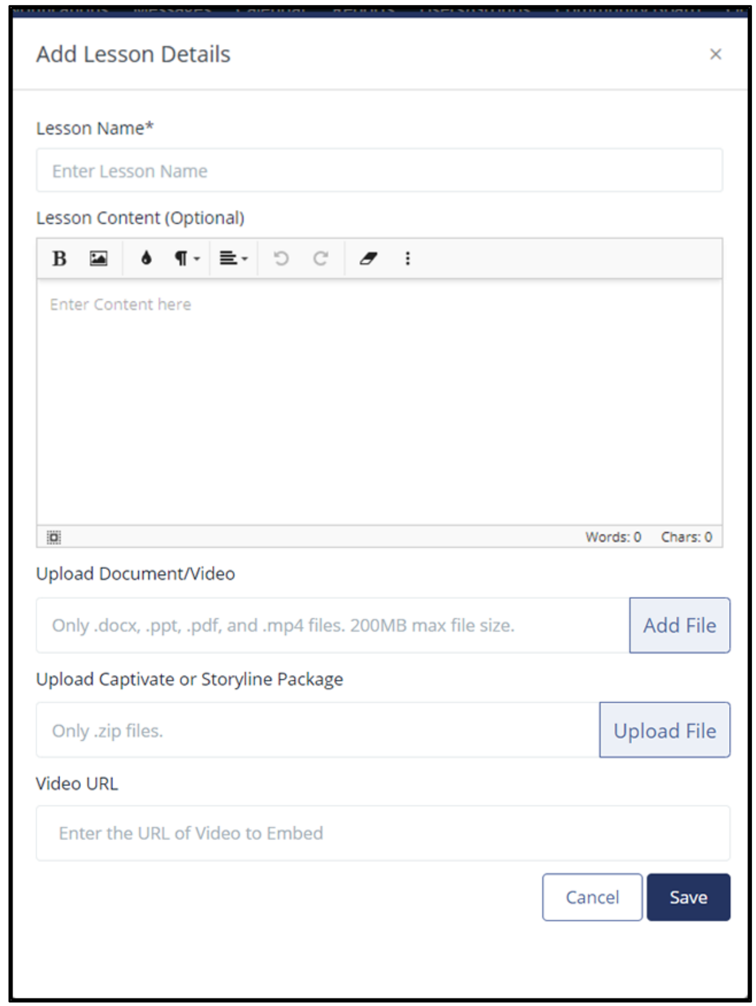
Best Practice Tip: When copying content into the text editor from a Word or PDF file, first paste it into Notepad (PC) or Notes (Mac) to remove any embedded html code.

If you have existing training, you can:

- Upload Document/Video
- Upload a Captivate or Storyline Package
- Or add a Video URL

You can only use **one** of these options. Any uploaded file will overwrite lesson content within the Lesson Content text field.

Best Practice Tip: Links to external websites should not be embedded in an Articulate or Captivate file. Instead, they should be added to a separate lesson as an individual link.



Course Content – Uploading Documents and Videos

- **Upload Document/Video** – Permitted file formats for upload are Word, PDF, PowerPoint, MOV (iOS only), MP3, and MP4.

Notice: The maximum file size is 200 MB.

Best Practice Tip: Because Word documents are not native to Android and iOS, some features may display improperly in the mobile application. We recommend converting these to PDF.

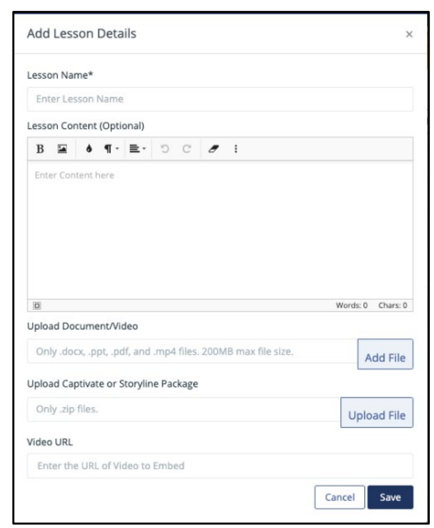
Warning: There are default radio buttons and pre-defined text on some pages of TalentSpring. If there are non-default radio buttons selected or non-default text appears, you will need to clear your browser cache. For more information on clearing your browser cache, please see the "Help" section of your browser.

- **Upload SCORM** – You can upload packaged .zip files that contain courseware created in Articulate Storyline or Adobe Captivate. Once you have uploaded the file, a drop-down will appear. Select the HTML file that should open when launched from the mobile application.

- **Video URL** – here you can add a link to a video or website that contains the content.

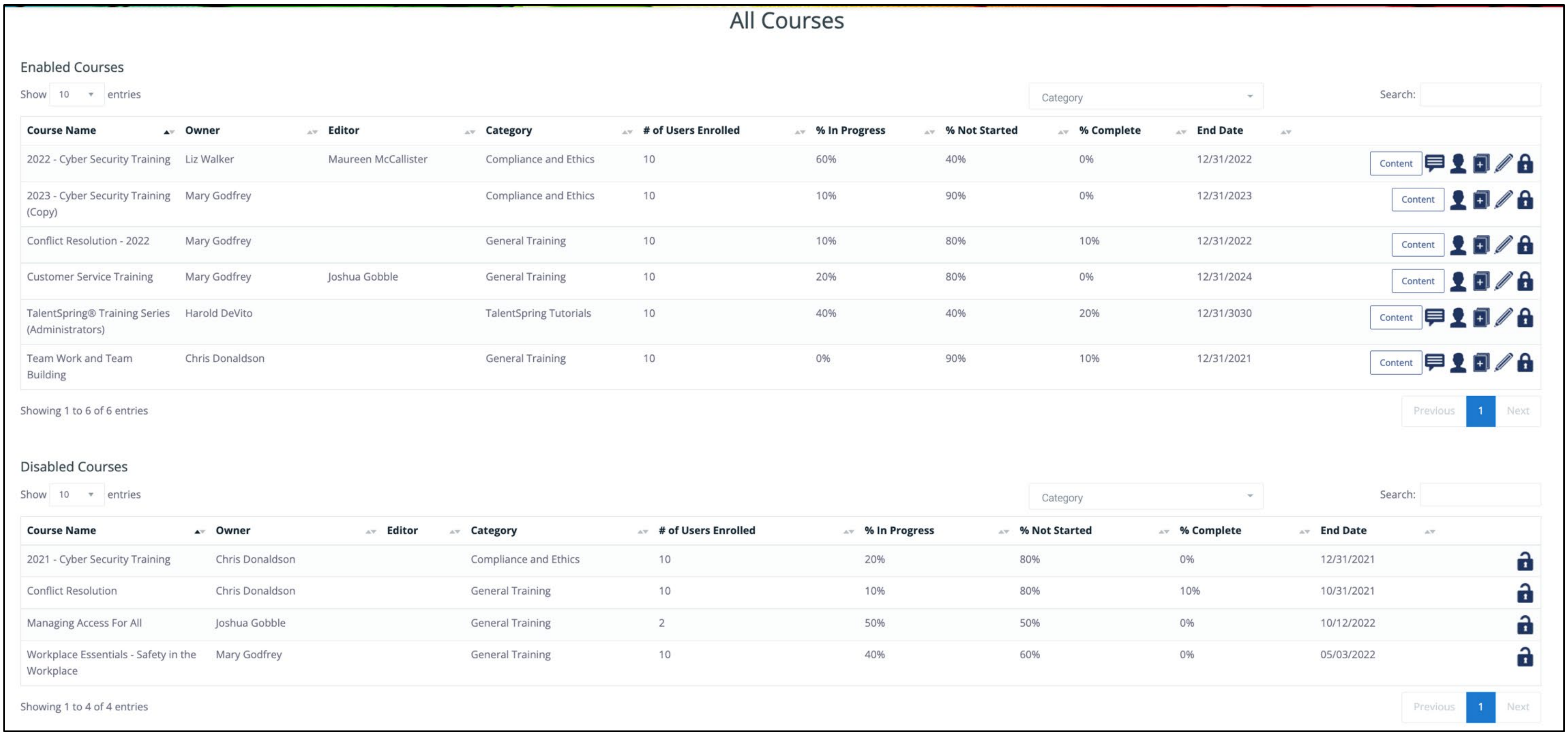
Best Practice Tip: Captivate or Articulate files work best on mobile devices if they are built responsive. Also, any embedded quizzes can be made as a standalone quiz within the course content page. This will allow for easier reporting and editing of the quiz.

Warning: Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.



All Courses Screen

To access a list of All Courses, select the **Courses>All Courses** menu option. Here you can view Enabled Courses and Disabled Courses for all trainers in the organization. The column headers include Course Name, Owner, Editor, # of Users Enrolled, % Complete, and End Date. Each icon on this screen identifies a control that will be discussed in detail later in the User Guide. **Notice:** You can filter by category by selecting a specific category from the drop-down. Only items associated with this category will display in the list.



All Courses

Enabled Courses

Show 10 entries | Category | Search:

Course Name	Owner	Editor	Category	# of Users Enrolled	% In Progress	% Not Started	% Complete	End Date	
2022 - Cyber Security Training	Liz Walker	Maureen McCallister	Compliance and Ethics	10	60%	40%	0%	12/31/2022	Content
2023 - Cyber Security Training (Copy)	Mary Godfrey		Compliance and Ethics	10	10%	90%	0%	12/31/2023	Content
Conflict Resolution - 2022	Mary Godfrey		General Training	10	10%	80%	10%	12/31/2022	Content
Customer Service Training	Mary Godfrey	Joshua Gobble	General Training	10	20%	80%	0%	12/31/2024	Content
TalentSpring® Training Series (Administrators)	Harold DeVito		TalentSpring Tutorials	10	40%	40%	20%	12/31/3030	Content
Team Work and Team Building	Chris Donaldson		General Training	10	0%	90%	10%	12/31/2021	Content

Showing 1 to 6 of 6 entries | Previous 1 Next

Disabled Courses

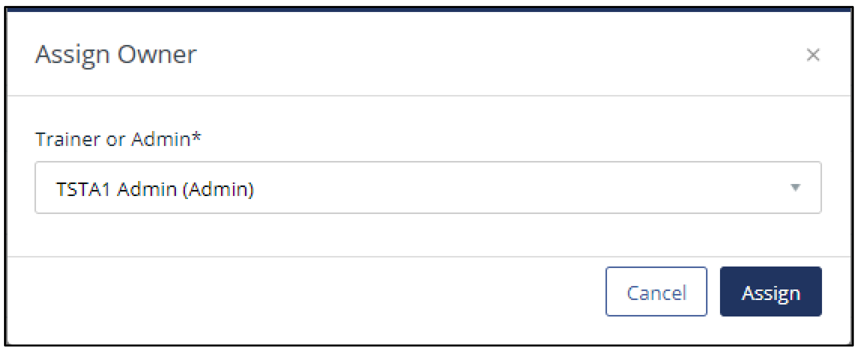
Show 10 entries | Category | Search:

Course Name	Owner	Editor	Category	# of Users Enrolled	% In Progress	% Not Started	% Complete	End Date
2021 - Cyber Security Training	Chris Donaldson		Compliance and Ethics	10	20%	80%	0%	12/31/2021
Conflict Resolution	Chris Donaldson		General Training	10	10%	80%	10%	10/31/2021
Managing Access For All	Joshua Gobble		General Training	2	50%	50%	0%	10/12/2022
Workplace Essentials - Safety in the Workplace	Mary Godfrey		General Training	10	40%	60%	0%	05/03/2022

Showing 1 to 4 of 4 entries | Previous 1 Next

All Courses – Icon Options

- **Content** – select **Content** to edit the content of the course.
- **Assign an owner** – select the person icon to assign a different owner to the course.

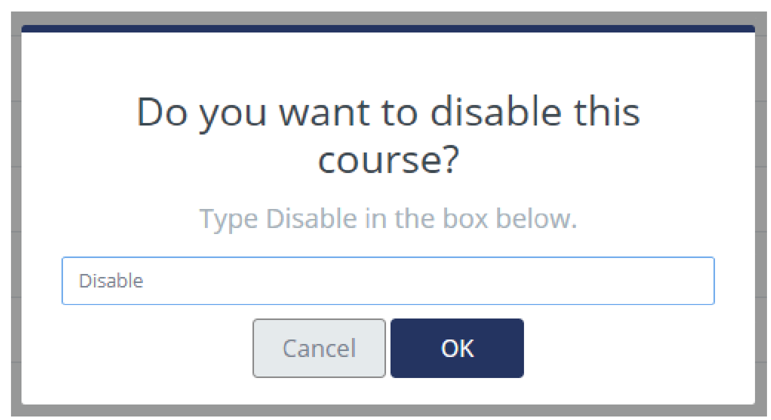


- **Message the owner** – select the speech icon, to message the ownerv. This option will not be available to courses assigned to you since you are the owner.
- **Duplicate course** – select the double page icon, to duplicate the course. The new course will appear as a copy. **Example:** Course Name (Copy).

Best Practice Tip: An example of when you might want to duplicate a course is when you need to add a one-off participant that requires a different end date than the participant groups(s) already assigned to the course.

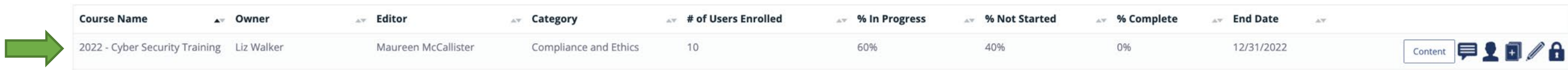
- **Edit course** – select the pencil icon to edit course properties. Options available here are the same as the Create Course section. **Remember:** You can select items from the Setup Progress list to jump to the area you need to edit.
- **Disable course** – this means that the course will no longer be available in the mobile application. To disable, select the lock icon to disable the course.
  - Type the word "Disable" into the text field.
  - Click OK.
  - Click OK again once the successful message appears.

The disable icon will change to the enable icon (open lock) and appear in the Disabled Courses table. Click the enable icon and follow the same process to Enable.

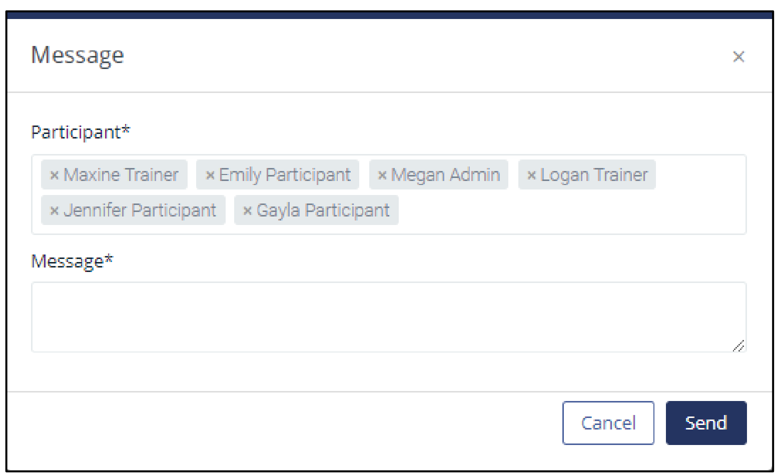


All Courses – Messaging & Progress Quick View

If you click on the Course Name within the table, you will be able to view additional information about the course.

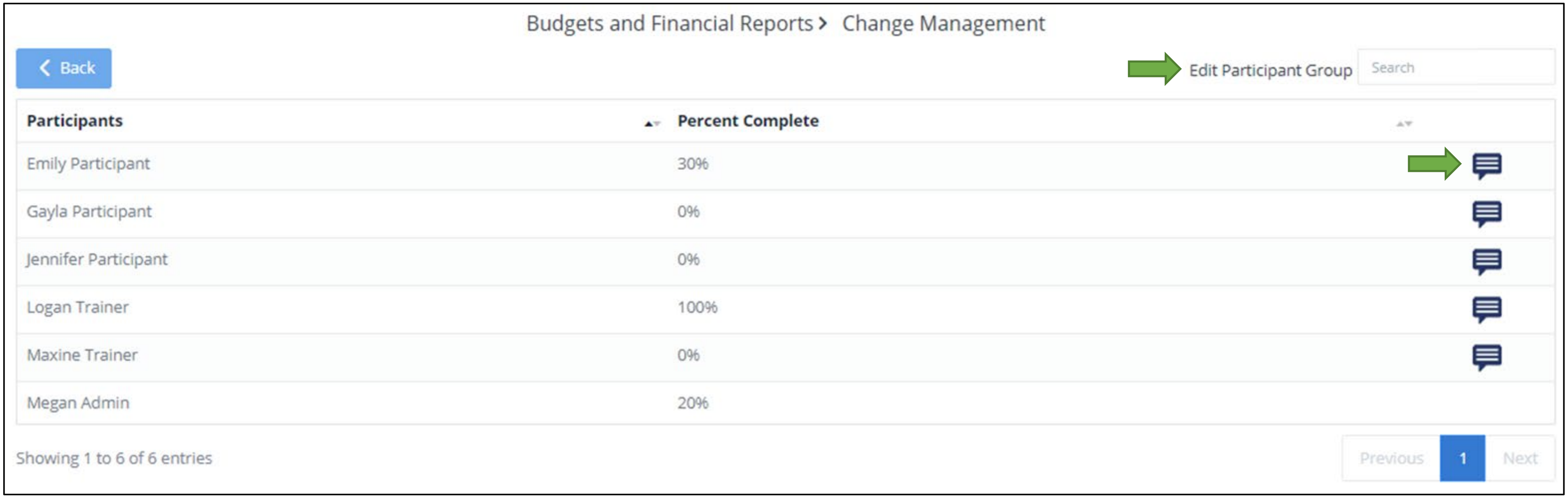


The screen will display additional data specific to the course, by participant group. The **Percent Rate** displays the average level of completion by participant, the **Due Date** reminds you when the course is due, and selecting the message icon allows you to message all participants in that group. Lastly, you have the option to **Add Participant Group** from this view.



All Courses – Participant Group Progress Quick View

Click on a participant group to drill down further and see specific data by participant. You can select **Edit Participant Group** to add or remove participants. Select the message icon to begin a message for the individual participant.



Use the **Back** buttons to return to the previous tables.

My Courses Screen

Select **Courses>My Courses** from the top navigation bar to access the My Courses screen. My Courses displays only the courses that you own. You will not have the message the trainer control option since you are the owner of the course.


Enable Courses

Show 10 entries Search:

Course Name	Editor	# of Users Enrolled	% In Progress	% Not Started	% Completed	End Date	
2023 - Cyber Security Training (Copy)		10	10%	90%	0%	12/31/2023	Content
Conflict Resolution - 2022		10	10%	80%	10%	12/31/2022	Content
Customer Service Training	Joshua Gobble	10	20%	80%	0%	12/31/2024	Content

Showing 1 to 3 of 3 entries Previous 1 Next

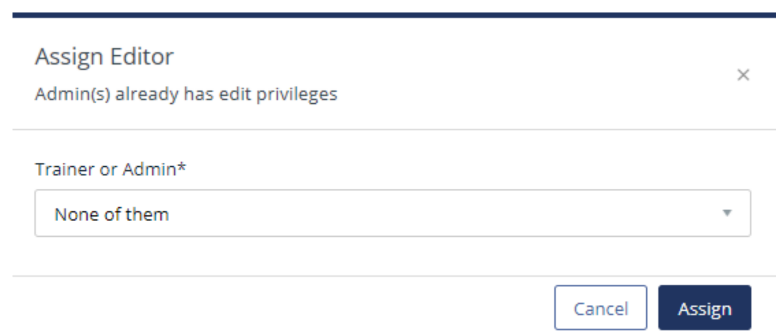
Disable Courses

Show 10 entries Search:

Course Name	Editor	# of Users Enrolled	% Not Started	% In Progress	% Completed	End Date	
Workplace Essentials - Safety in the Workplace		10	60%	40%	0%	05/03/2022	Content

Showing 1 to 1 of 1 entries Previous 1 Next

Notice: The double person icon represents the **Assign Editor** control. Here you can select another trainer or administrator who will have edit privileges to your course, but you will retain ownership. This is a great option if you will be unavailable for a period of time. However, keep in mind that only the owner will receive messages sent from participants in the mobile app when they select Contact Trainer. The Editor column will list any editors assigned to your courses. You can only have one editor per course.

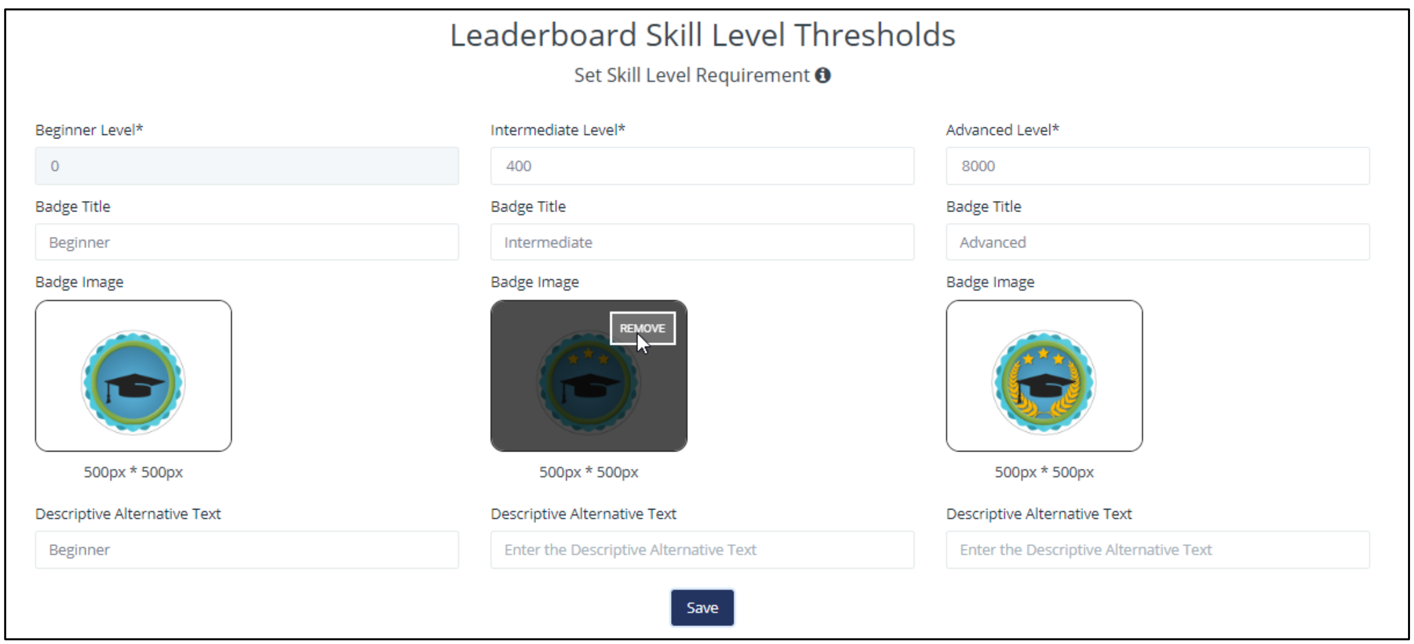


Leaderboard

Skill Level Requirement

Select **Leaderboard>Skill Level Requirement** from the top navigation bar to access Leaderboard Skill Level Thresholds. Here you can set the thresholds for the leaderboard skill levels – **Beginner**, **Intermediate**, and **Advanced**. Achieving a new skill level will allow participants to earn a new badge that will be displayed next to their name and point level on the leaderboard. Ensure that the Advanced point level is set higher than the Intermediate point level. The Beginner level will always be 0 since everyone starts with no points.

To replace the current badge image, hover over the item and select Remove. To upload a file, select Upload, browse for the file, and click on open, or, drag the file from its location to the portal. File formats that can be uploaded are **JPEG** and **PNG**. For best results, ensure that the uploaded image is 500 pixels x 500 pixels. You can add descriptive alternative text to images for users reading with assistive technology.

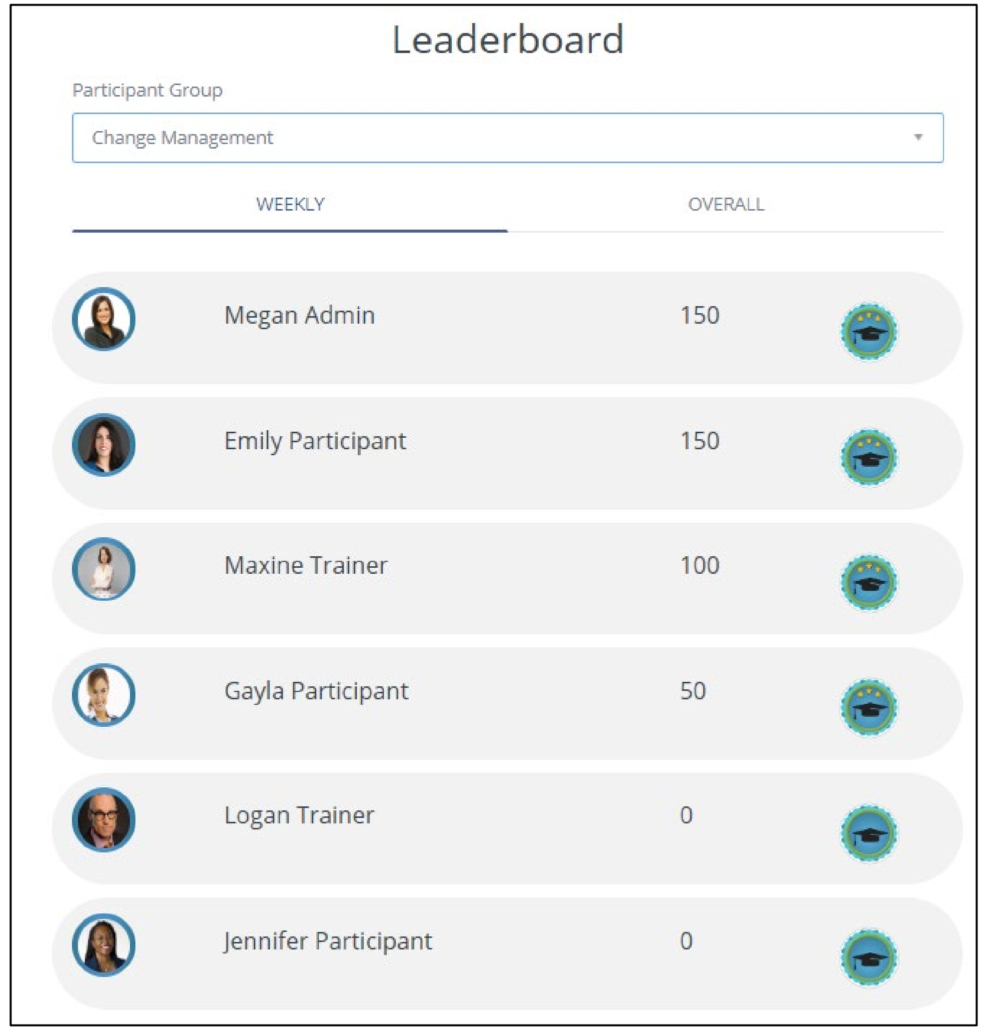


Warning: Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.

Leaderboard List

Select **Leaderboard>Leaderboard List** from the top navigation bar to access the Leaderboard. This screen allows you to view the points earned and skill level for participants. Use the **Participant Group** drop-down to see a specific participant group. There is also an option to view **Everyone**. You can filter the leaderboard by:

- **Weekly** – Standing based on only the current week (as of Sunday).
- **Overall** – Standing based on overall scores.

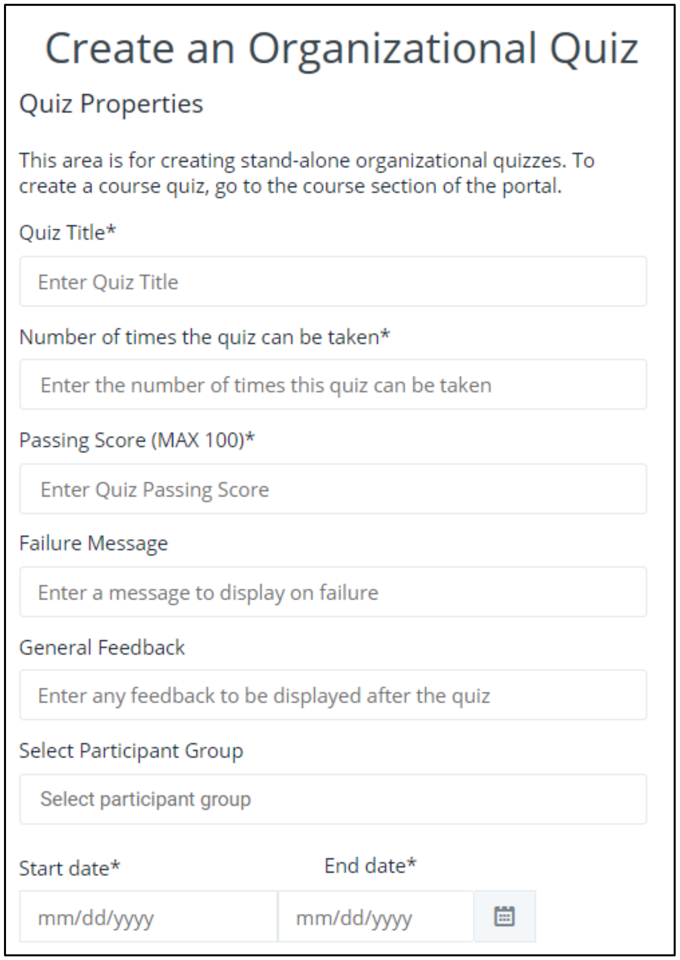


Quizzes, Polls, & Surveys

Create Quiz

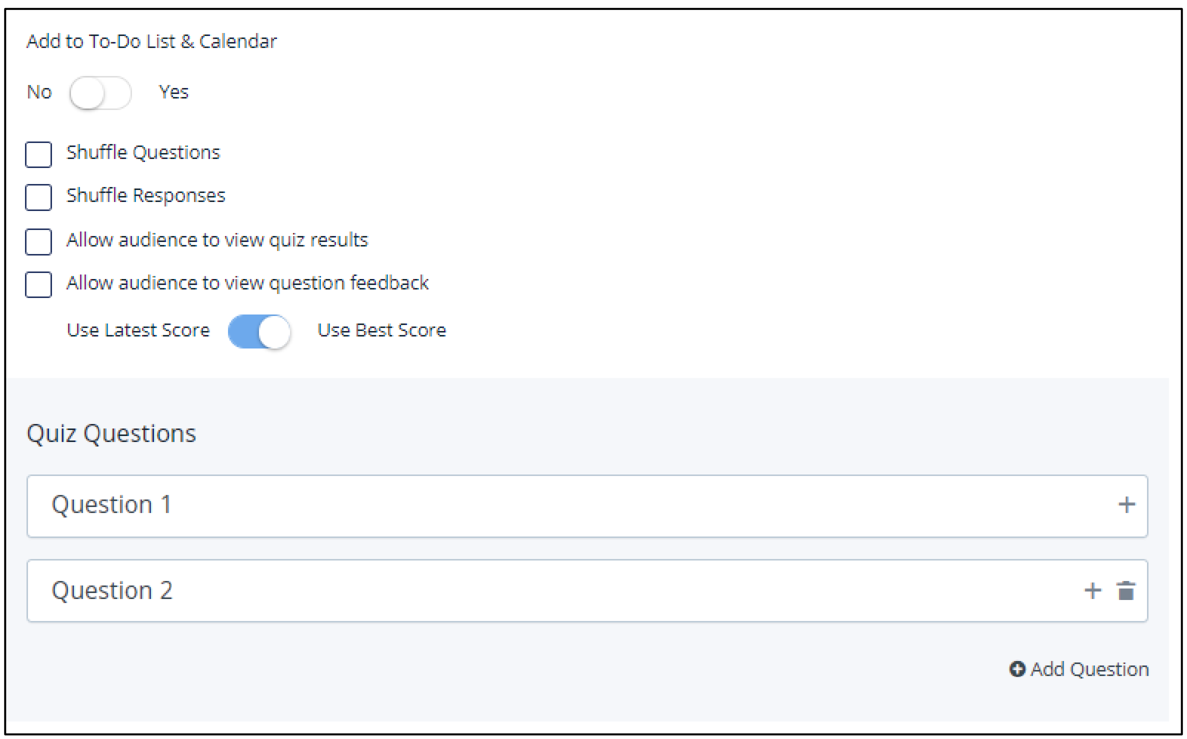
To create an organizational quiz, select **Quizzes, Polls & Surveys>Create Quiz** from the top navigation bar. Quizzes can be embedded in a course, and the same options discussed here will be available. However, a course quiz will inherit the start date, end date, and participant group of the course. There is also an additional option explained on the following page. **Note:** All items with an asterisk are required**.**

- **Quiz Title** - this is the title of the quiz as it will appear in the mobile application.
- **Number of times the quiz can be taken** – this can be any amount.
- **Passing Score** – enter a score between 0 and 100.
- **Failure Message** - this message will display if the participant fails the quiz.
- **General Feedback** - this message will display if the participant passes the quiz.
- **Select Participant Group** – here, you must enter one or more participant groups. To remove a participant group, click the (x). **Note:** Participant groups can be created from the **User/Groups>Create Participant Group** menu option.
- **Start Date** – this is when the quiz will be available for all users.
- **End Date** – this is the date the quiz will no longer be available for access. **Note:** If this will not expire, set a distant date.

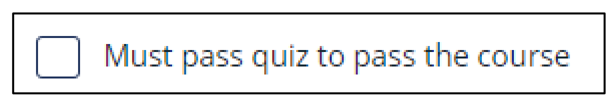


Create Quiz – Quiz Options

- **Add to To-Do List & Calendar** – selecting **Yes** will add the quiz to the participants' To-Do List and Calendar.
- **Shuffle Questions** – if selected, all questions will be shuffled.
- **Shuffle Responses** – if selected, all responses will be shuffled.
- **Allow audience to view quiz results** – once the participant has completed the maximum number of quiz attempts, they can view the results.
- **Allow audience to view question feedback** – this will allow you to provide specific feedback for each question.
- **Quiz Questions** – at least one quiz question must be populated.
  - Click the plus symbol to expand the question properties.
  - Click the delete symbol to delete the question.
  - Click **Add Question** to add another question. You can add as many questions as you like.



Note: Course quizzes have an option to select **Must pass quiz to pass the course**. When this option is selected, if the user does not meet the pass criteria within the allotted attempts, the user will fail the course and no certificate, badge, or points will be awarded.



Create Quiz – How to add a Question

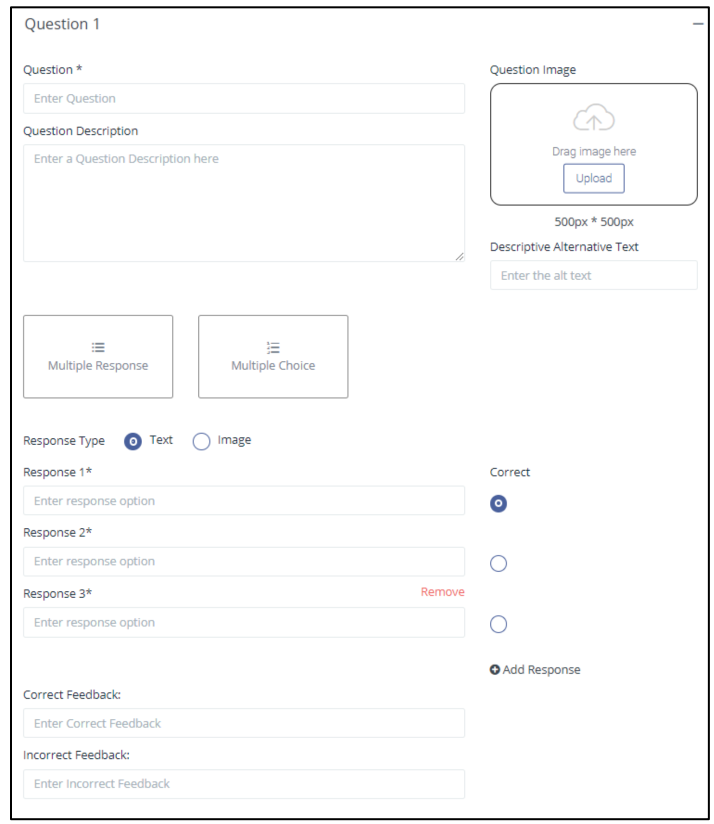
- **Question** – the question as it will appear in the mobile application.
- **Question Description** – optional description for clarification. **Note:** This does not appear in the mobile application.
- **Question Image** – to upload a file, select Upload, browse for the file, and click on open, or, drag the file from its location to the portal. File formats that can be uploaded are **JPEG** and **PNG**. For best results, ensure that the uploaded image is 500 pixels x 500 pixels. You can add descriptive alternative text to images for users reading with assistive technology.

> **Warning:** There are default radio buttons and pre-defined text on some pages of TalentSpring. If there are non-default radio buttons selected or non-default text appears, you will need to clear your browser cache. For more information on clearing your browser cache, please see the "Help" section of your browser.

The types of questions you can add are Multiple Choice and Multiple Response. You can select a response type of either text or image (at least two are required). Click on **Add Response** or **Remove** to add or remove additional responses.

Multiple Choice will allow the participant to select only one response while multiple response allows all to be selected. The item(s) marked as correct will determine how the question is judged. **Note:** For Multiple Response, no partial credit is given.

If **Allow audience to view question feedback** is selected in the quiz properties, you can insert custom **Correct** and **Incorrect Feedback** that will appear in the mobile application.



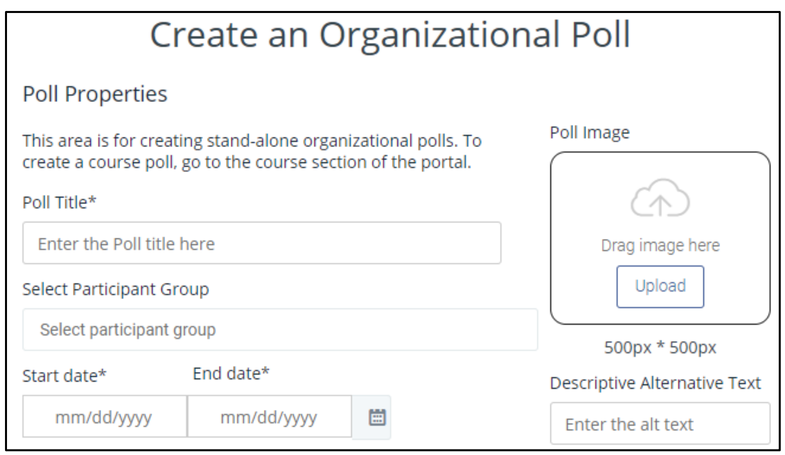
Create Poll

To create an organizational poll, select **Quizzes, Polls & Surveys>Create Poll** from the top navigation bar. Polls can also be embedded in a course, and the same options discussed here will be available. However, a course poll will inherit the start date, end date, and participant group of the course. **Note:** All items with an asterisk are required**.**

- **Poll Title** - this is the title of the poll as it will appear in the mobile application.
- **Select Participant Group** – here, you must enter one or more participant groups. To remove a participant group, click the (x). **Note:** Participant groups can be created from the **User/Groups>Create Participant Group** menu option.
- **Start Date** – this is when the poll will be available for all users.
- **End Date** – this is the date the poll will no longer be available for access. **Note:** If this will not expire, set a distant date.
- **Poll Image** – to upload a file, select Upload, browse for the file, and click on open, or, drag the file from its location to the portal. File formats that can be uploaded are **JPEG** and **PNG**.

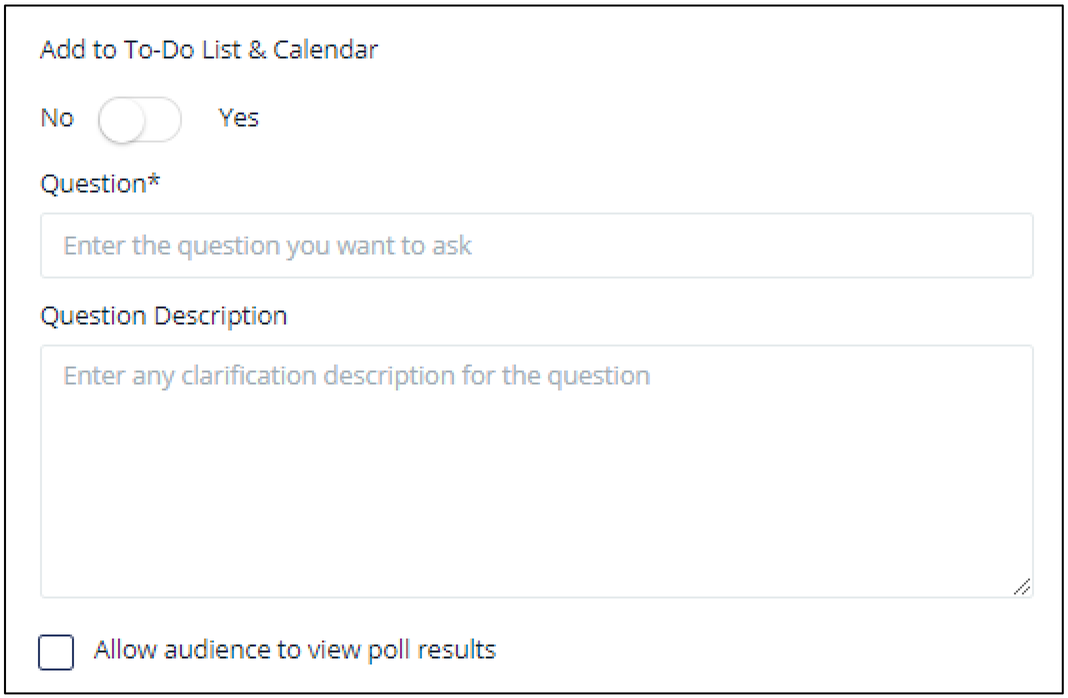
> **Warning:** Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.

For best results, ensure that the uploaded image is 500 pixels x 500 pixels. You can add descriptive alternative text to images for users reading with assistive technology.



Create Poll – Poll Options

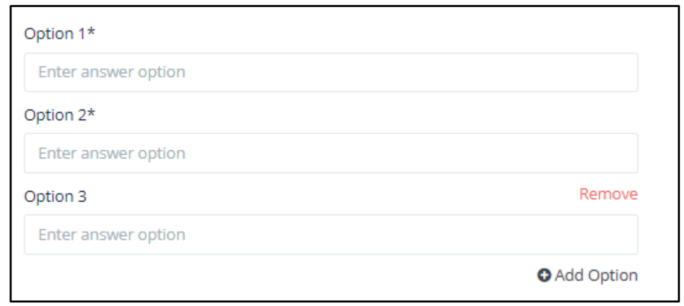
- **Add to To-Do List & Calendar** – selecting **Yes** will add the poll to the participants' To-Do List and Calendar.
- **Question** – the question as it will appear in the mobile application.
- **Question Description** – optional description for clarification.
- **Allow audience to view poll results** – if selected the participant can see the results for all participants' responses. **Note:** The participant will only see the poll results, not participant names.



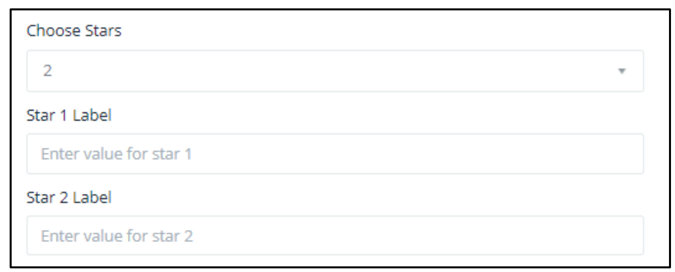
Create Poll – How to add a Poll Question

The types of questions you can add are Multiple Choice, Multiple Response, Star Rating, and Textbox.

- **Multiple Choice and Multiple Response** – this question type allows you to provide up to 10 response options (at least two are required). Click on **Add Option** or **Remove** to add or remove an option**.** Multiple Choice will allow the participant to select only one response while multiple response allows all to be selected.



- **Star Rating** – this question type allows you to ask a question in a Likert-scale format. You can use up to 5 stars and enter a label for each.



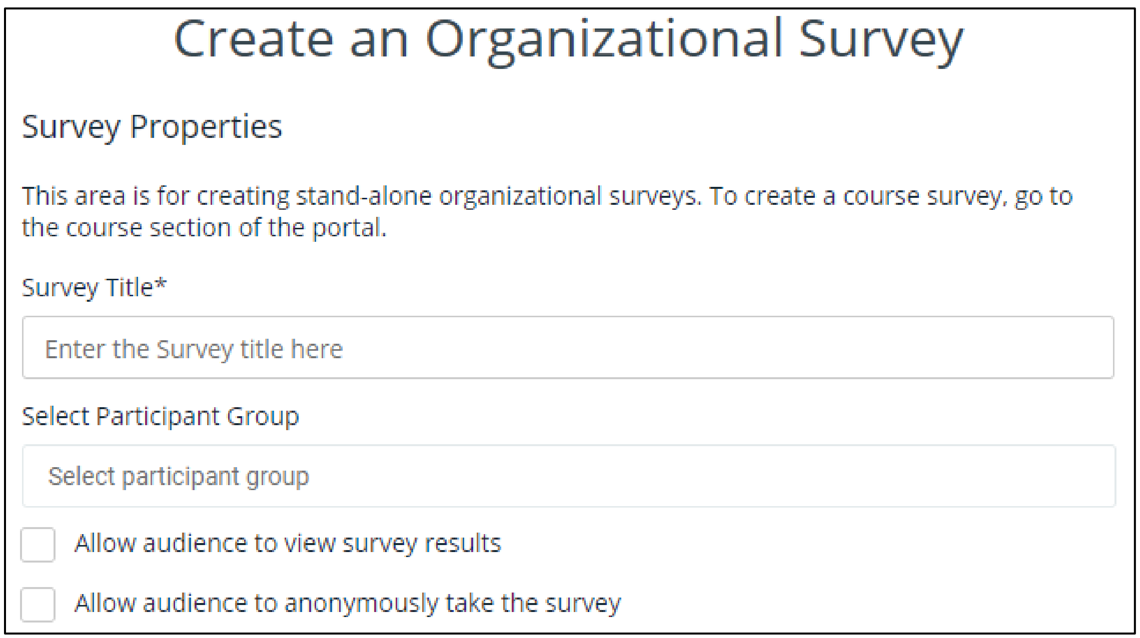
- **Textbox** – this question type allows the participant to compose their response in an open-text field. You can determine the character limit for this question type.

When you have added all your poll questions and responses, click on **Save** to save your poll. **Note:** If you want to include multiple questions, see **Create Survey**.

Create Survey

To create an organizational survey, select **Quizzes, Polls & Surveys>Create Survey** from the top navigation bar. Surveys can also be embedded in a course, and the same options discussed here will be available. However, a course survey will inherit the start date, end date, and participant group of the course. **Note:** All items with an asterisk are required**.**

- **Survey Title** - this is the title of the survey as it will appear in the mobile application.
- **Select Participant Group** – here, you must enter one or more participant groups. To remove a participant group, click the (x). **Note:** Participant groups can be created from the **User/Groups>Create Participant Group** menu option.
- **Allow audience to view survey results** – once completed, the participant will view only their own results.
- **Allow audience to anonymously take the survey** – when Administrator/Trainers view results in the portal or run a Survey report, participants' names will not appear with the responses.



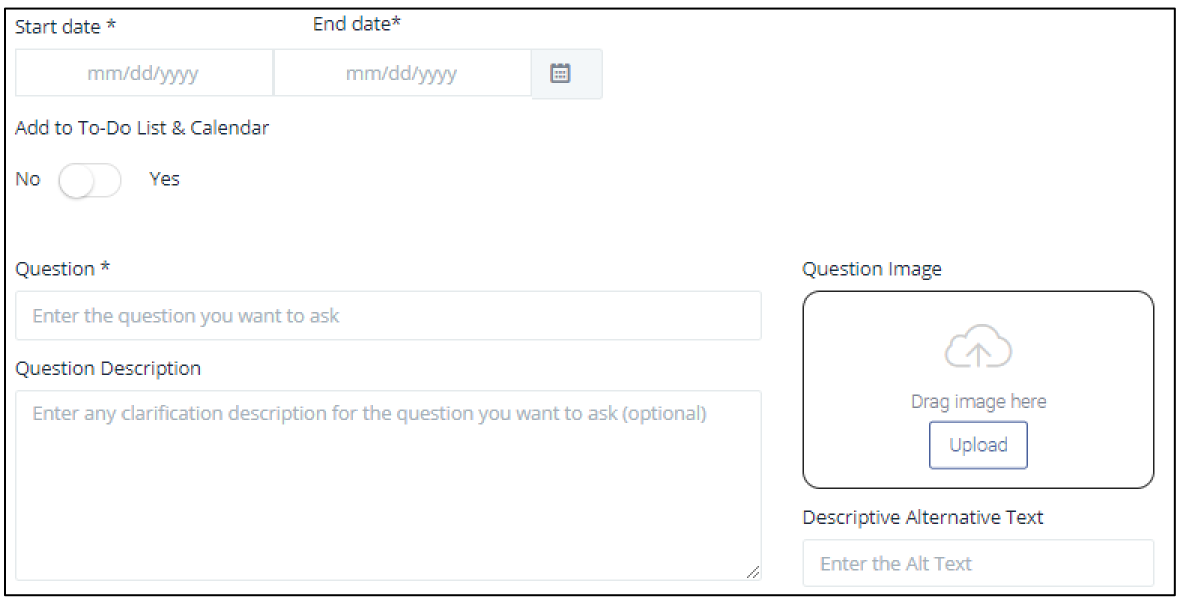
Best Practice Tip: Add "anonymous" at the end of the survey title if this option is checked. Example: My Survey (anonymous).

Create Survey – Survey Options

- **Start Date** – this is when the survey will be available for all users.
- **End Date** – this is the date the survey will no longer be available for access. **Note:** If this will not expire, set a distant date.
- **Add to To-Do List & Calendar** – selecting **Yes** will add the survey to the participants' To-Do List and Calendar.
- **Question** – the question as it will appear in the mobile application.
- **Question Description** – optional description for clarification.
- **Question Image** – to upload a file, select Upload, browse to the file, and open, or, drag the file from an open file explorer window. File formats that can be uploaded are **JPEG** and **PNG**.

Warning: Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.

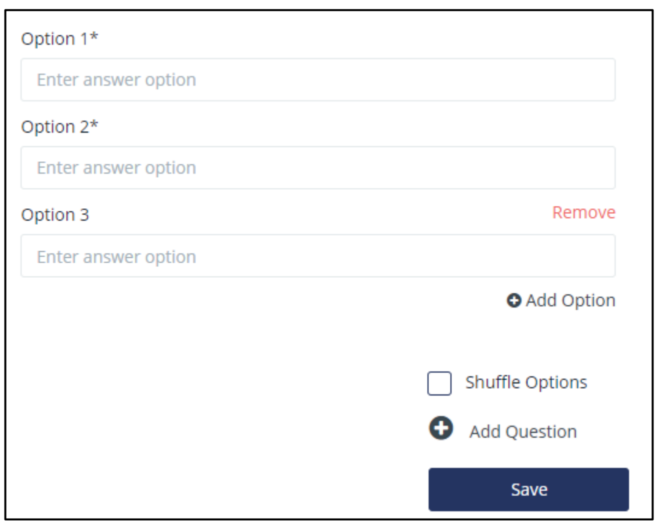
For best results, ensure that the uploaded image is 500 pixels x 500 pixels. You can add descriptive alternative text to images for users reading with assistive technology.



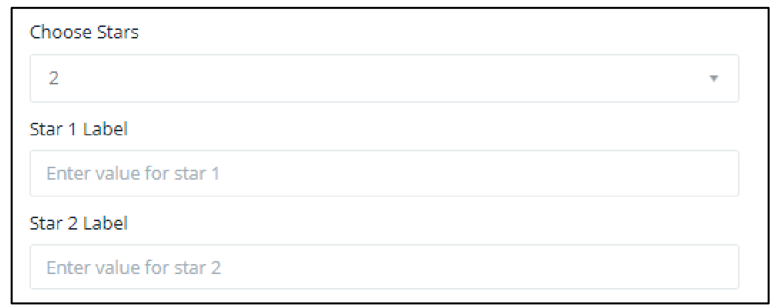
Create Survey- How to add a Survey Question

The types of questions you can add are Multiple Choice, Multiple Response, Star Rating, and Textbox.

- **Multiple Choice and Multiple Response** – this question type allows you to provide up to 10 response options (at least two are required). Click on **Add Option** or **Remove** to add or remove an option. Multiple Choice will allow the participant to select only one response while multiple response allows all to be selected. For both, you can elect to **Shuffle Options**.



- **Star Rating** – this question type allows you to ask a question in a Likert-scale format. You can use up to 5 stars and enter a label for each.



- **Textbox** – this question type allows the participant to compose their response in an open-text field. You can determine the character limit for this question type.

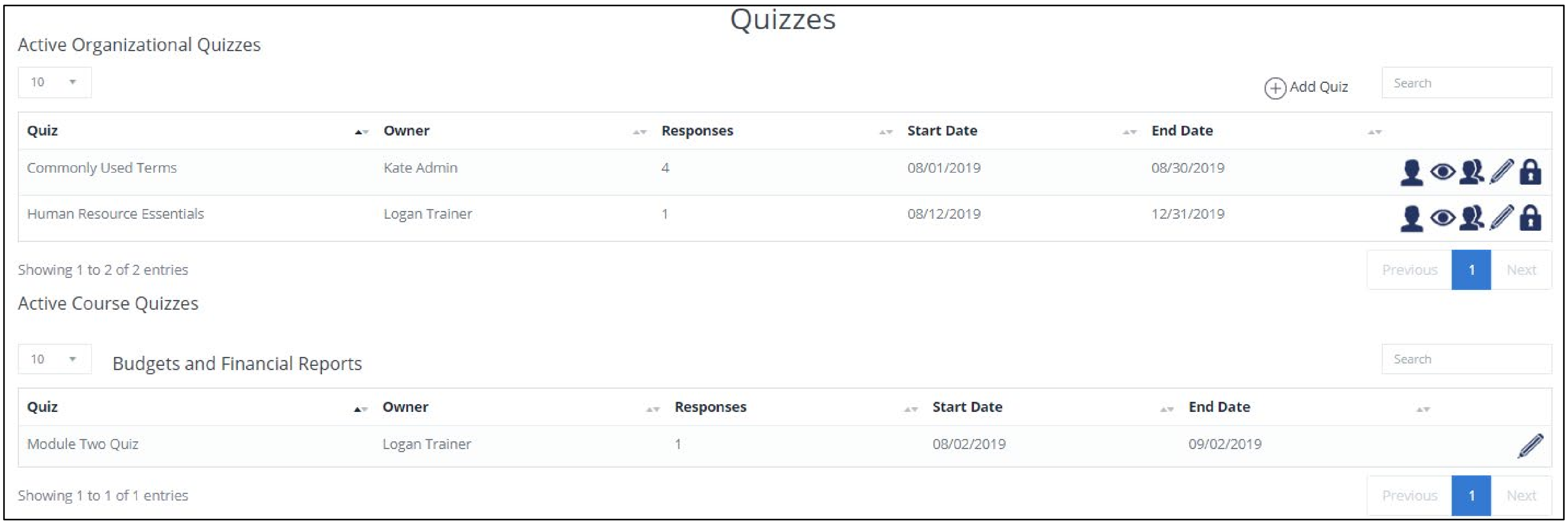
When you have added all your questions and responses, click on **Save** to save your survey.

All Quizzes Screen

Select **Quizzes, Polls & Surveys>All Quizzes** from the top navigation bar to view all Organizational and Course quizzes. Column headings are:

- **Quiz** – the title given when the quiz was created.
- **Owner** – the name of the Administrator/Trainer that created the quiz.
- **Responses** – the number of participants who have responded to the quiz.
- **Start Date** – the date the quiz will be available on the mobile application.
- **End Date** – the date the quiz will expire and no longer be available on the mobile application.

Note: You also have the option to add an organizational quiz from this screen.



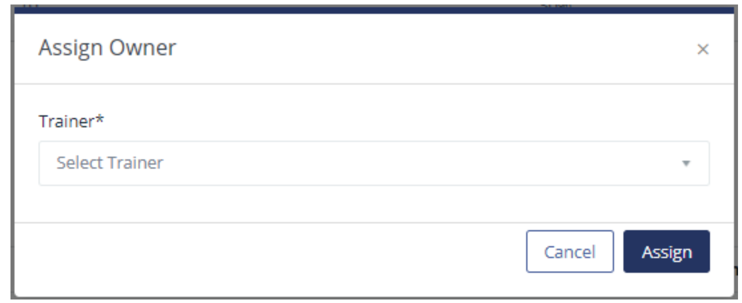
Quiz	Owner	Responses	Start Date	End Date	
Commonly Used Terms	Kate Admin	4	08/01/2019	08/30/2019	
Human Resource Essentials	Logan Trainer	1	08/12/2019	12/31/2019	

Quiz	Owner	Responses	Start Date	End Date	
Module Two Quiz	Logan Trainer	1	08/02/2019	09/02/2019	

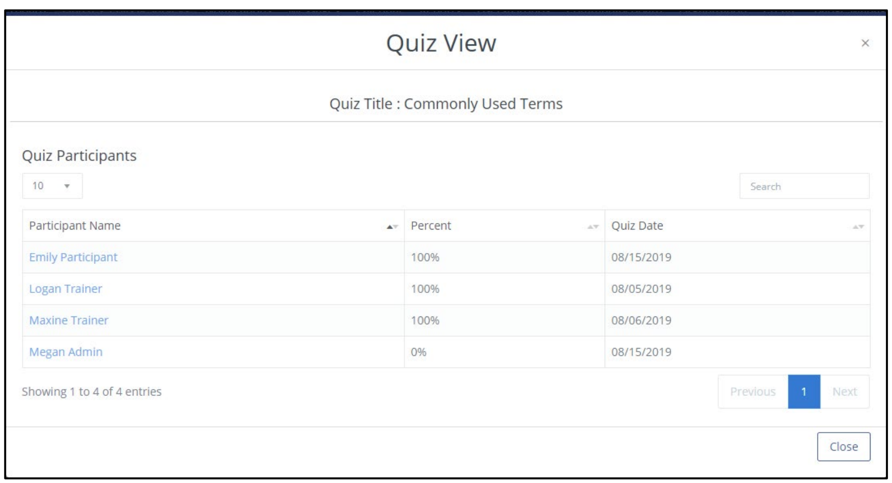
All Quizzes – Assigning an Owner and Quiz Data Quick View

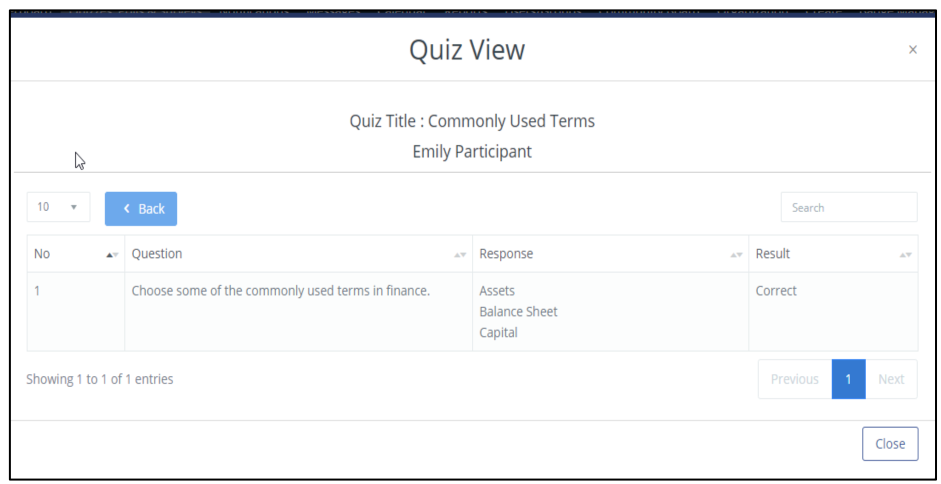
For Active Organizational Quizzes, you have the following controls:

- **Assign an owner** – select the person icon to assign a different trainer to the quiz.



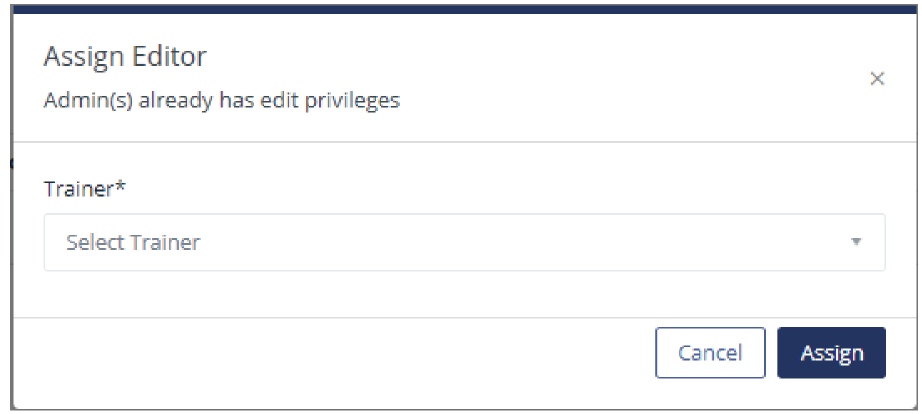
- **View the quiz data** – select the eye icon to view the Participants, Percent complete, and Quiz Date (the most recent date the quiz was taken). Select an individual Participant to drill-down and see individual responses.





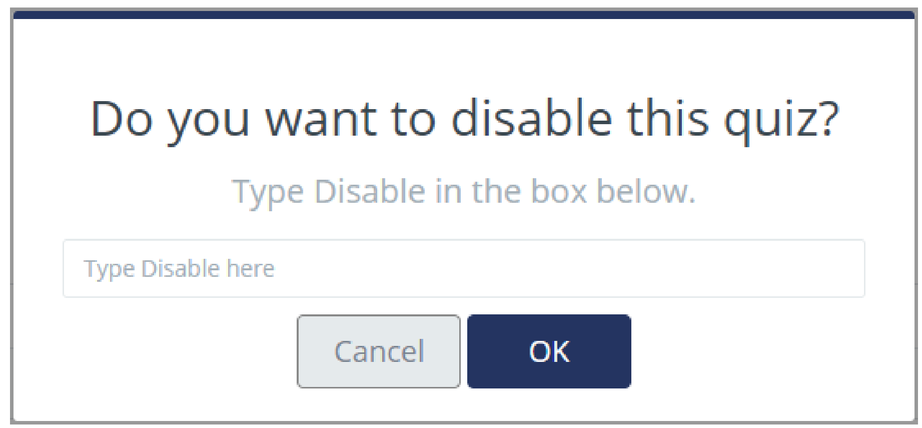
All Quizzes - Assigning an Editor, Editing, and Disabling Quizzes

- **Assign Editor** – select another trainer who will have edit privileges to your quiz, but you will retain ownership. Assign Editor is a great option if you will be unavailable for a period of time.



- **Edit quiz** – select the pencil icon to edit quiz properties and content. You will have the same options available as when you created the quiz.

- **Disable quiz** – this means that the quiz will no longer be available in the mobile application. To disable, select the lock icon to disable the course.
  - Type the word "Disable" into the text field.
  - Click OK.
  - Click OK again once the successful message appears.



The disable icon will change to the enable icon (open lock). Click the enable icon and follow the same process to Enable.

All Quizzes – Active and Disabled Screens

For **Active Course Quizzes**, you have the option to edit the quiz properties and content from this screen.

Active Course Quizzes

10 Budgets and Financial Reports Search

Quiz	Owner	Responses	Start Date	End Date
Module Two Quiz	Logan Trainer	1	08/02/2019	09/02/2019

Showing 1 to 1 of 1 entries Previous 1 Next

When you scroll down to the bottom of the screen, you can view **Past Organizational Quizzes**. Select the eye icon to view the quiz data.

10 Past Organizational Quizzes Search

Quiz	Owner	Responses	Start Date	End Date
Change Management Pre-Test	Megan Admin	1	08/05/2019	08/12/2019

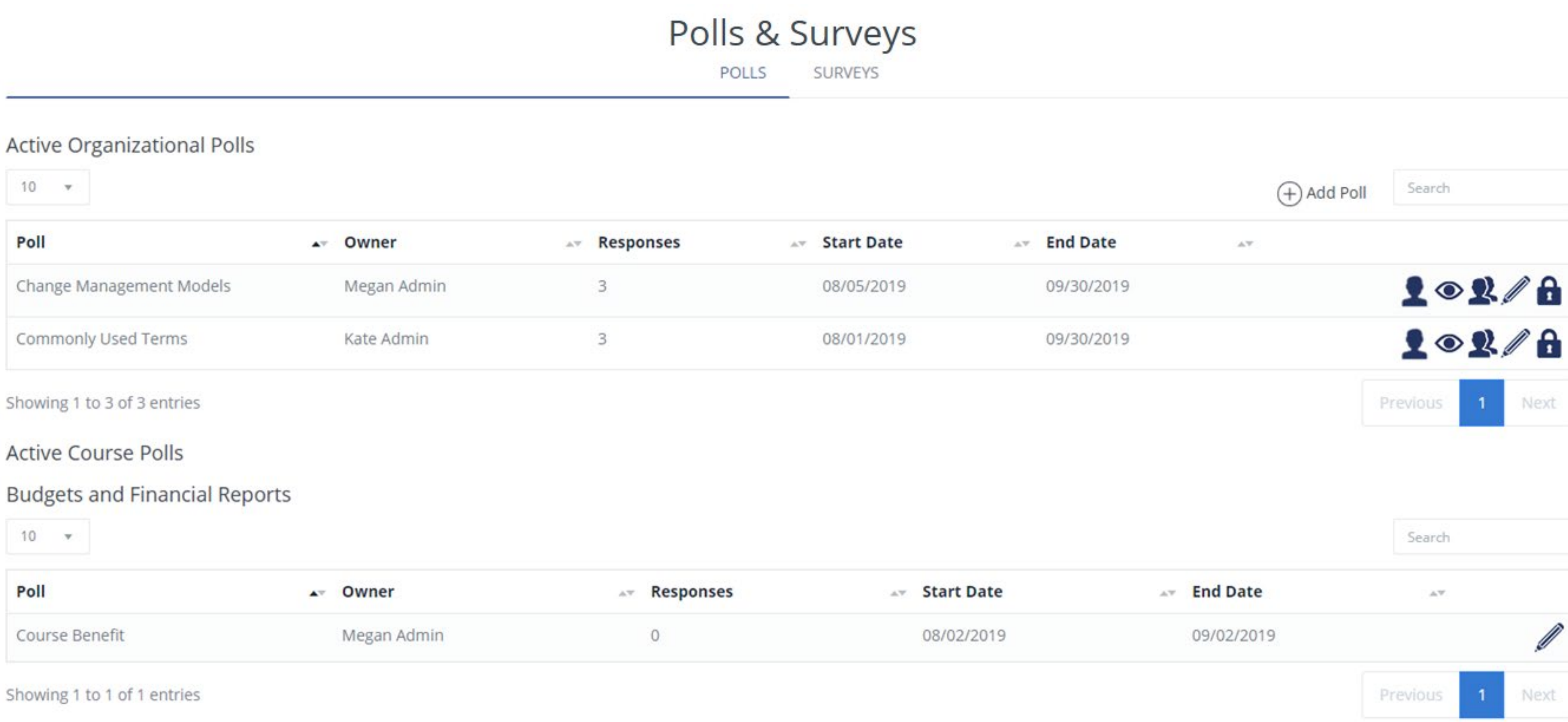
Showing 1 to 1 of 1 entries Previous 1 Next

All Polls/Surveys Screen

Select **Quizzes, Polls & Surveys>All Polls/Surveys** from the top navigation bar to view all Organizational and Course polls and surveys. **Notice:** You can navigate by selecting **POLLS** and **SURVEYS** at the top. Column headings are:

- **Poll/Survey** – the title given when the poll/survey was created.
- **Owner** – the name of the Administrator/Trainer that created the poll/survey.
- **Responses** – the number of participants who have responded to the poll/survey.
- **Start Date** – the date the poll/survey will be available on the mobile application.
- **End Date** – the date the poll/survey will expire and no longer be available on the mobile application.

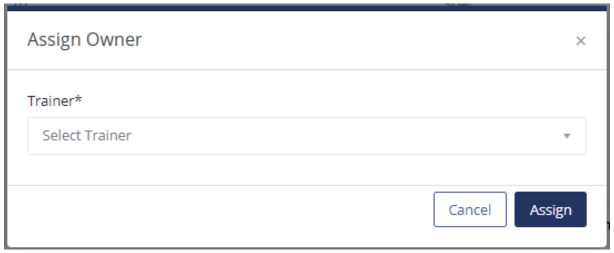
Note: You also have the option to add an organizational poll/survey from this screen.



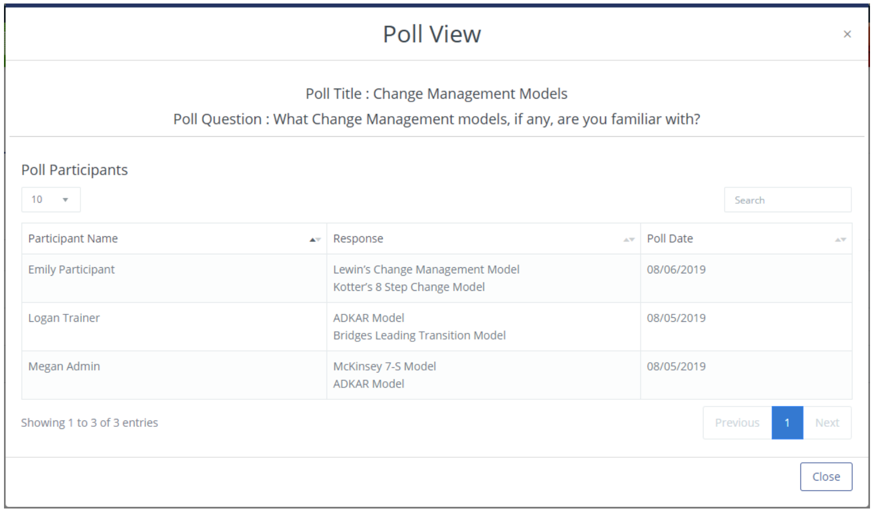
All Polls/Survey – Assigning an Owner and Poll/Survey Data Quick View

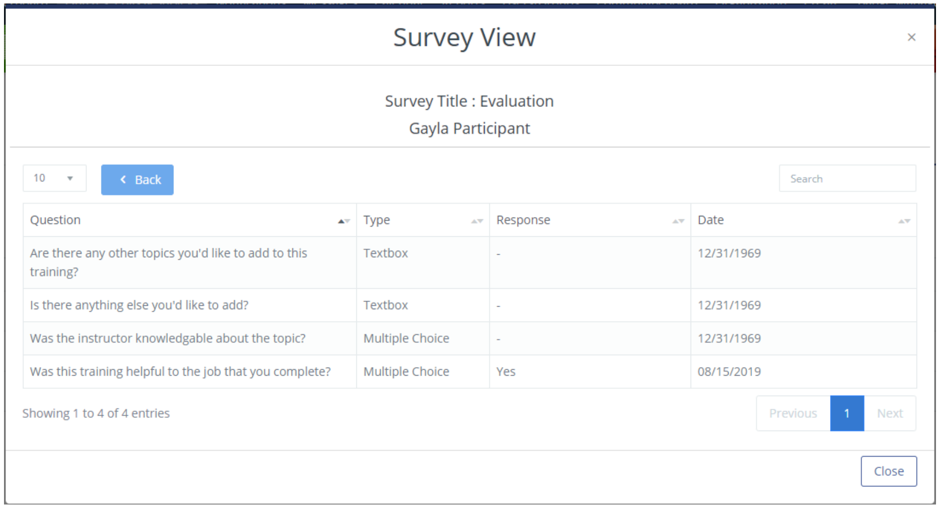
For Active Organizational Polls/Surveys, you have the following controls:

- **Assign an owner** – select the person icon to assign a different trainer to the poll/survey.

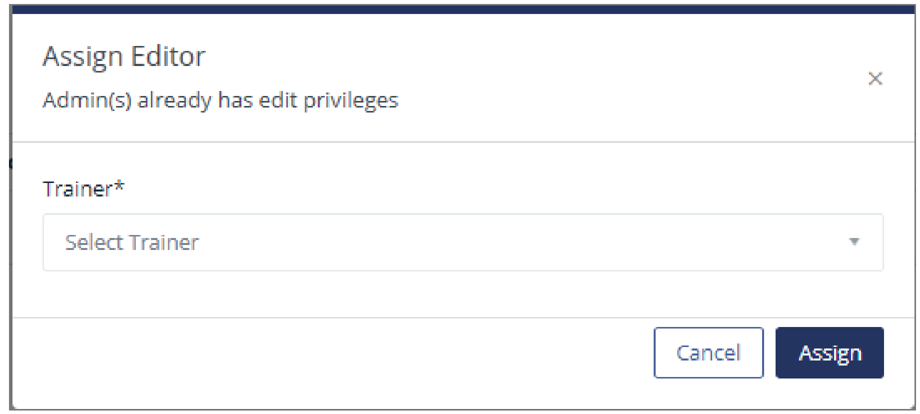


- **View the poll/survey data** –
  - For polls, select the eye icon to view the Participant Name, Response, and Poll Date (this is the date the poll was taken).
  - For surveys, select the eye icon to view the Participant Name and Survey Date (this is the date the survey was taken). Select an individual Participant to drill-down and see individual responses. **Note:** For anonymous surveys, the Participant Name will say anonymous.



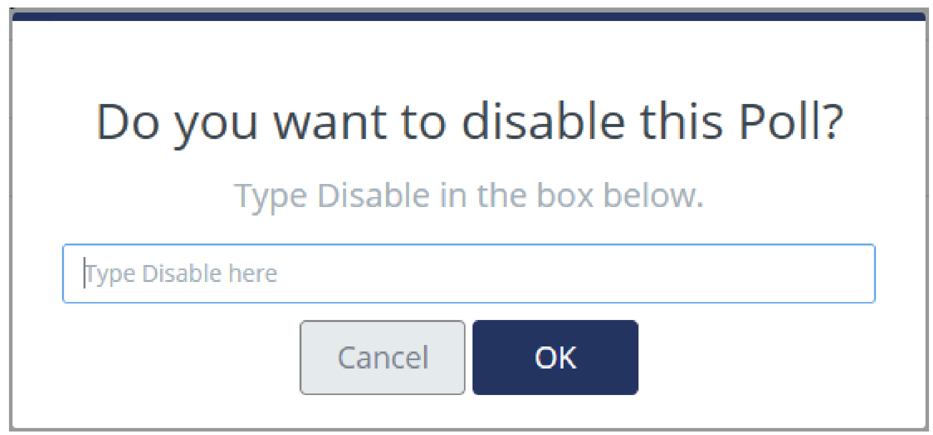


All Polls/Surveys – Assigning an Editor, Editing, & Disabling Polls/Surveys



- **Assign Editor** – select another trainer who will have edit privileges to your poll/survey, but you will retain ownership. Assign Editor is a great option if you will be unavailable for a while.

- **Edit poll/survey** – select the pencil icon to edit poll/survey properties and content. You will have the same options available as when you created the poll/survey.



- **Disable poll/survey** – this means that the poll/survey will no longer be available in the mobile application. To disable, select the lock icon to disable the course.
  - Type the word "Disable" into the text field.
  - Click OK.
  - Click OK again once the successful message appears.

  The disable icon will change to the enable icon (open lock). Click the enable icon and follow the same process to Enable.

All Polls/Surveys – Active & Disabled Screens

For Active Course Polls/Surveys, you have the option to edit the poll/survey properties and content from this screen.

Active Course Polls

Budgets and Financial Reports

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Search

Poll	Owner	Responses	Start Date	End Date
Course Benefit	Megan Admin	0	08/02/2019	09/02/2019

Showing 1 to 1 of 1 entries

Previous 1 Next

When you scroll down to the bottom of the screen, you can view Past Organizational Polls/Surveys. Select the eye icon to view the poll/survey data.

Past Organizational Polls

10

Search

Poll	Owner	Responses	Start Date	End Date
Change Management Models	Megan Admin	1	08/27/2019	08/27/2019

Showing 1 to 1 of 1 entries

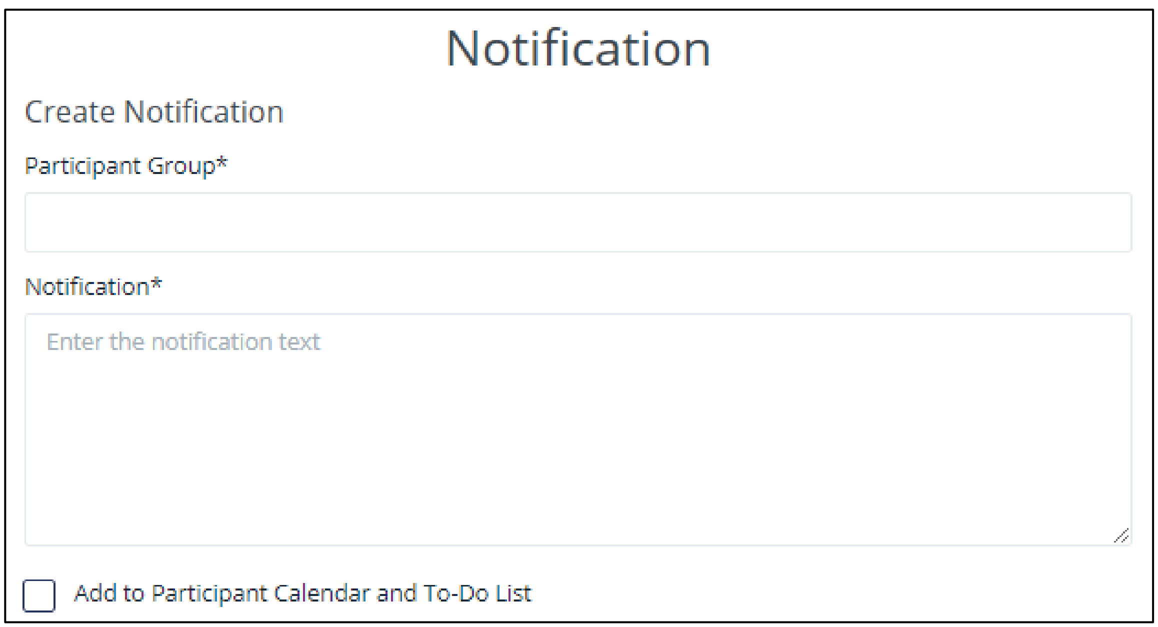
Previous 1 Next

Notifications

Create Notification

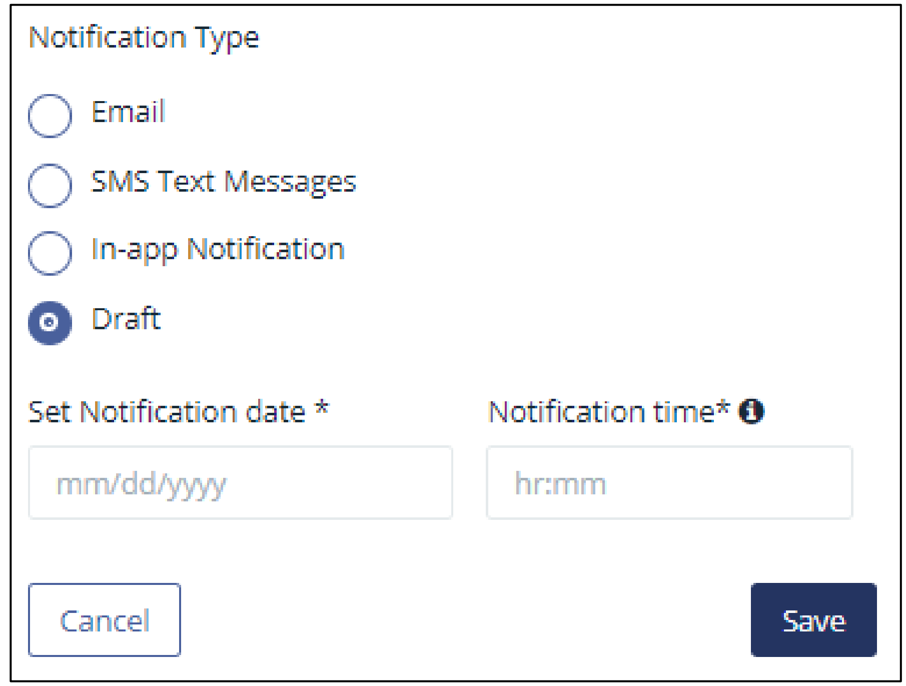
Select **Notification>Create Notification** from the top navigation bar to create a new notification. This feature allows Administrators/Trainers to create custom notifications.

- **Participant Group** – Select the Participant Group(s) you want to receive the notification. **Note:** If needed, you can create a participant group from the **User/Groups>Create Participant Group** menu option.
- **Notification** – Enter the notification text you would like to send. If it is related to a course, you can include that information here. **Note:** When composing your notification, keep in mind the notification type you are selecting. For example, a text message or in-app notification should be brief; an email would be better suited for a longer message.
- **Add to Participant Calendar and To-Do List** – Selecting this option will display the notification on the users' Calendar and To-Do list. Keep in mind that the To-Do will automatically be set to complete since there is no systematic action to complete.



Create Notification – Type & Scheduling

- **Notification Type** – You can select one of four options.
    - **Email** – This option will send the notification to the email associated with the user. This is the most reliable option as it uses the official email on file.
    - **SMS Text Message** – This option will send the notification as an SMS text message. The user will receive the text even if they are logged out or the application is closed. Keep in mind that they could have their text message notifications turned off locally on the mobile device.
    - **In-app Notification** – This option will send the notification as an in-app notification. It will display as a banner on the top of the mobile device if the user is logged in, even when the mobile application is not open. Keep in mind that, if the user has Notifications for this application turned off from the settings of their mobile device, they will not receive a banner. The notification will also display under the menu option **Notifications** within the mobile application.
    - **Draft** – This option will allow you to create your notification, to send later.

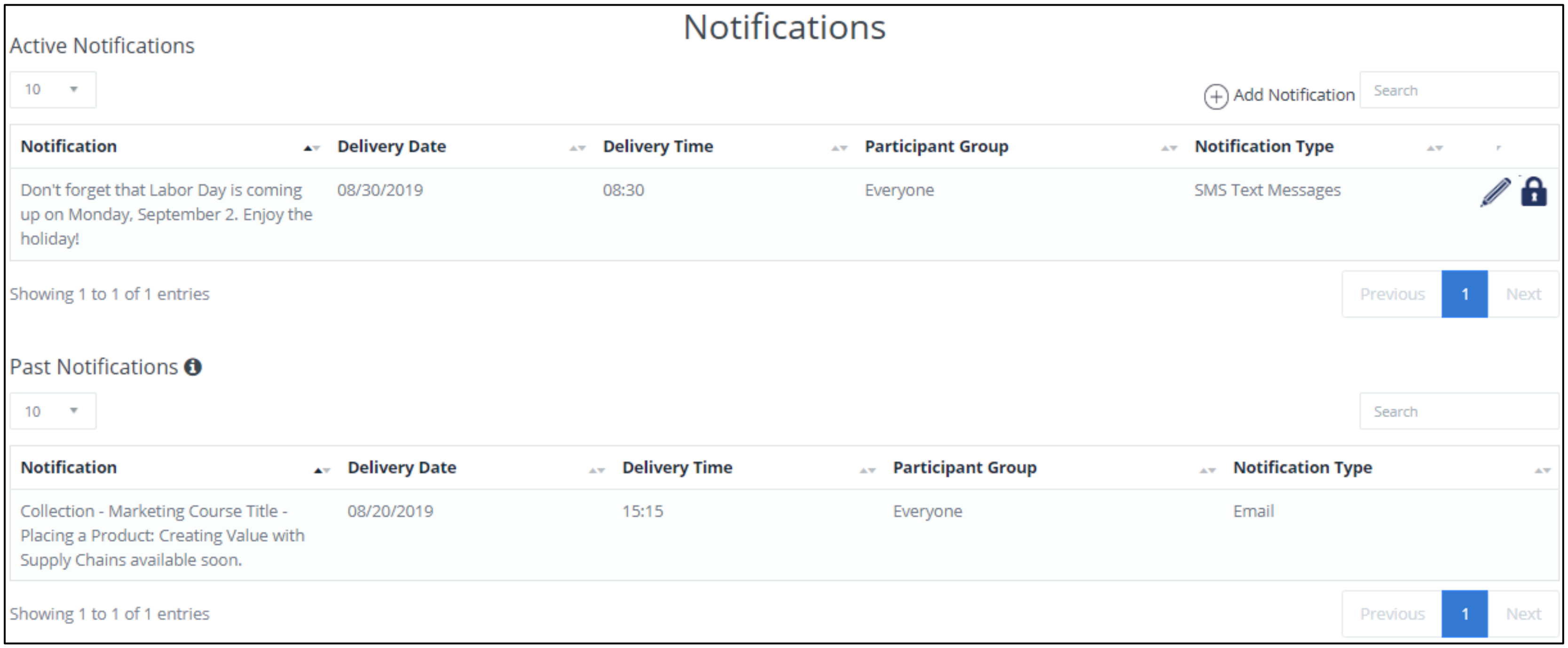


- **Notification Date** – This will set the date the notification is to be sent. **Note:** Once the notification is sent, the notification date cannot be edited.
- **Notification Time** – This will set the time the notification is sent. The hour options are displayed in 24-hour format. **Note:** This time is based on the organization’s time zone. Notifications are sent in 15-minute increments.

Click **Save** to complete your notification.

All Notification Screen

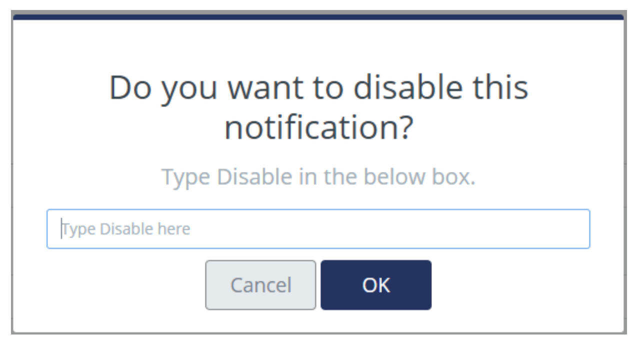
Select **Notification>All Notification** from the top navigation bar to view **Active** and **Past** notifications. The column headers include Notification, Delivery Date, Delivery Time, Participant Group, and Notification Type. **Note:** You can select **Add Notification** to create a new notification. For Active Notifications, you have controls to edit or disable. Notifications expire after three months.



To disable a notification, select the lock icon.

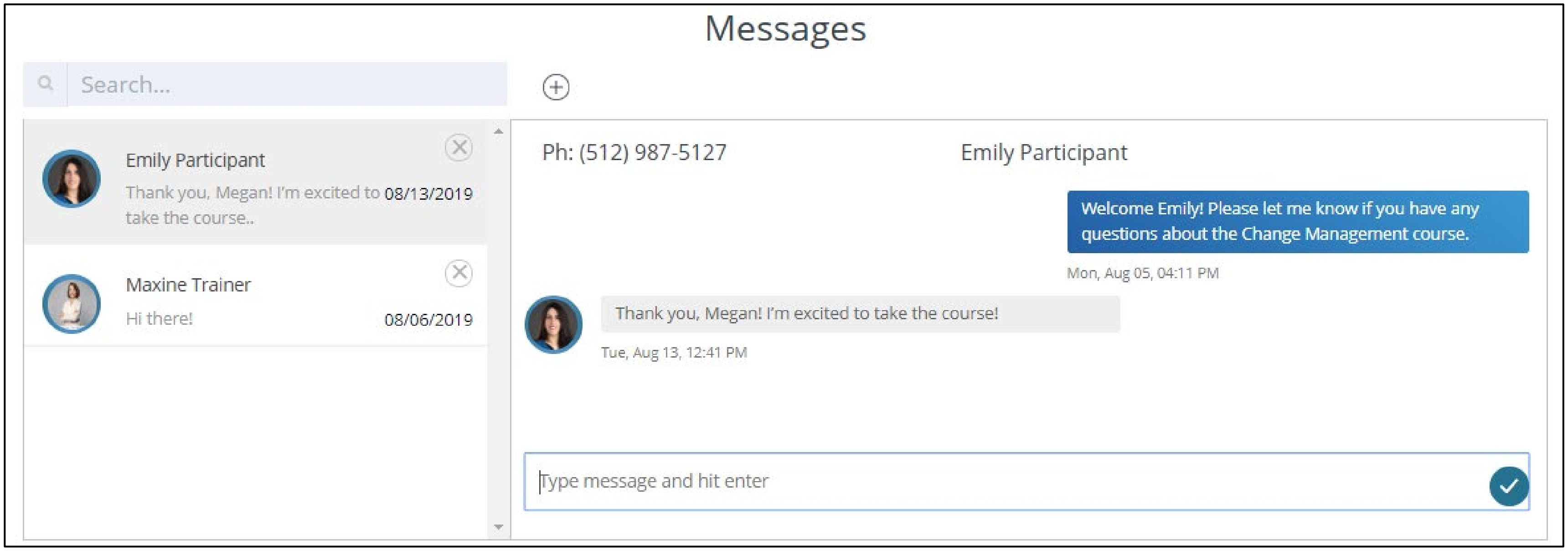
- Type the word "Disable" into the text field.
- Click OK.
- Click OK again once the successful message appears.

The disable icon will change to the enable icon (open lock). Click the enable icon and follow the same process to Enable a notification.



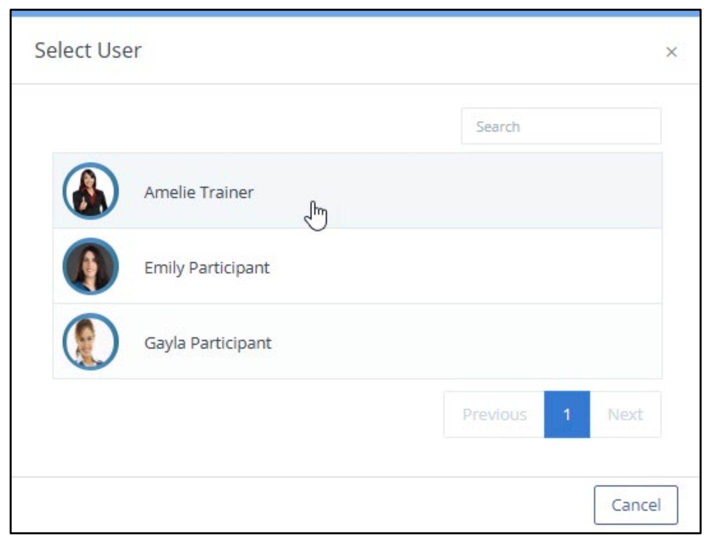
Messages

Select **Messages** from the top navigation bar to view your in-app message correspondence with Participants and Trainers. Select an ongoing conversation on the left and compose messages on the right. You can also type in keywords to Search your conversations.



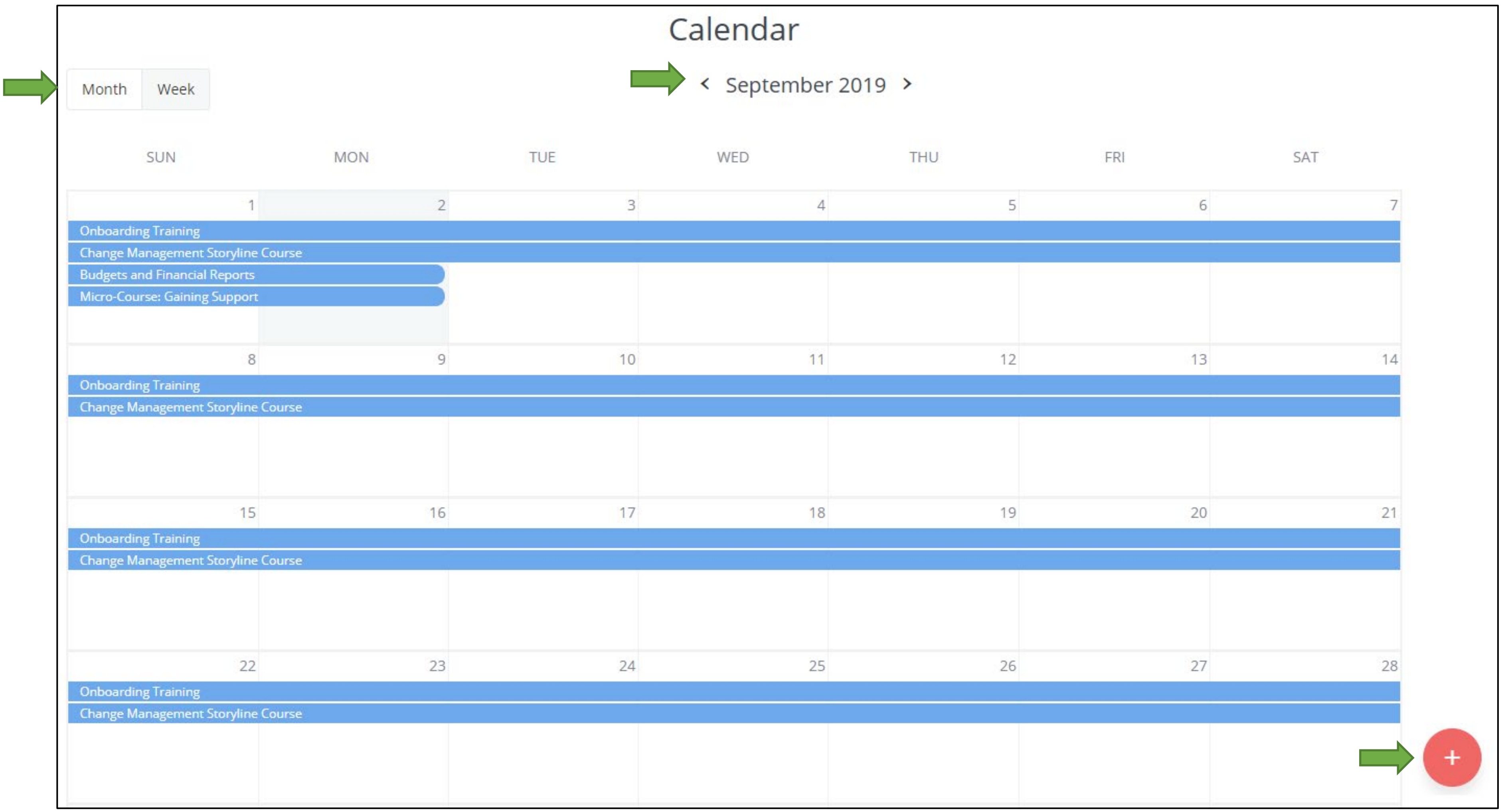
To start a new conversation, click the plus icon. A dialog box will display, allowing you to select any user in the organization. You can also type in keywords to Search users.

Note: When a participant contacts you using the Contact Trainer option from within a course on the mobile application, the course will automatically be referenced in the message. If you initiate contact with a participant, they can view and respond to the message in the **Messages** section of the mobile application.



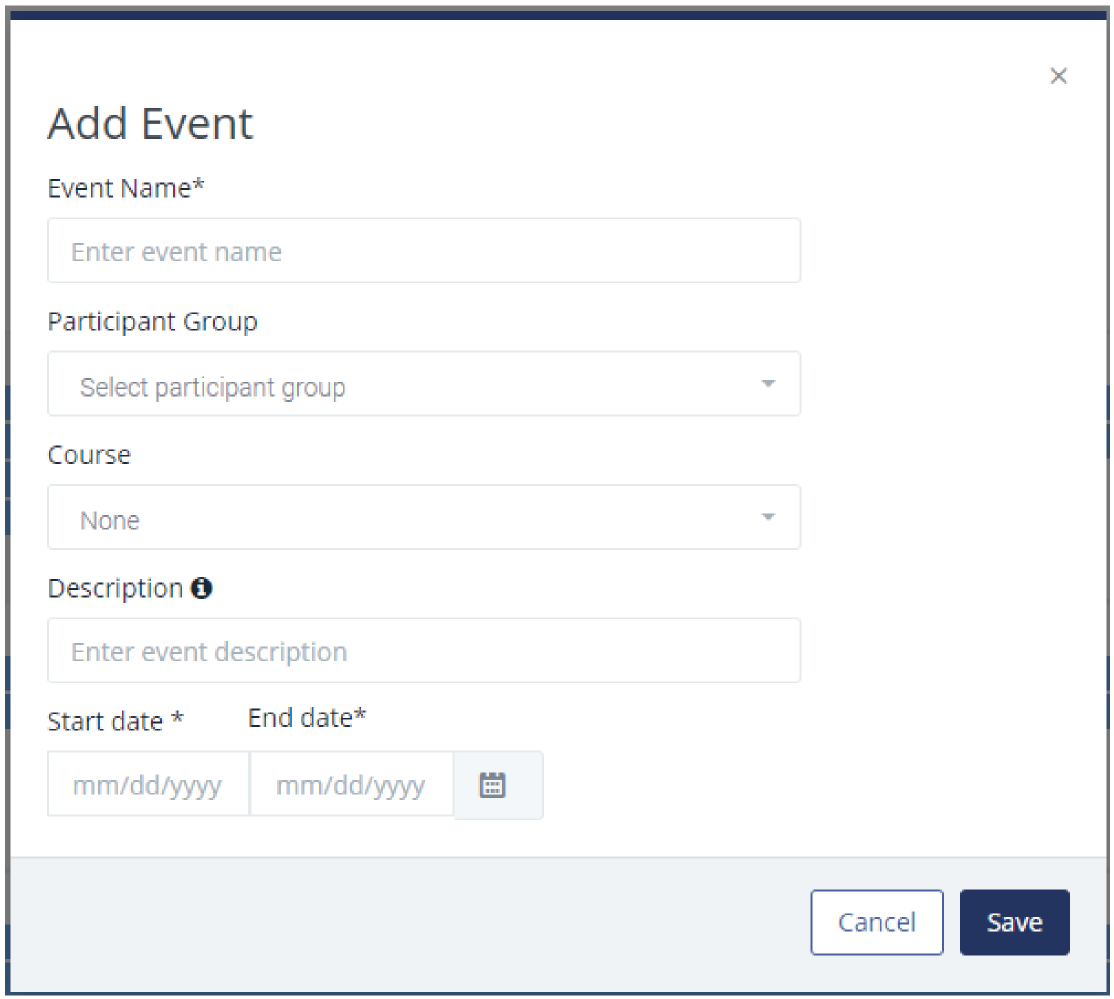
Calendar

Select **Calendar** from the top navigation bar to view your events either in a monthly or weekly view. Select the arrows to move from month to month (or week to week). You can select any item on the calendar to view, edit, or delete the event. Click the plus sign to add a new event.



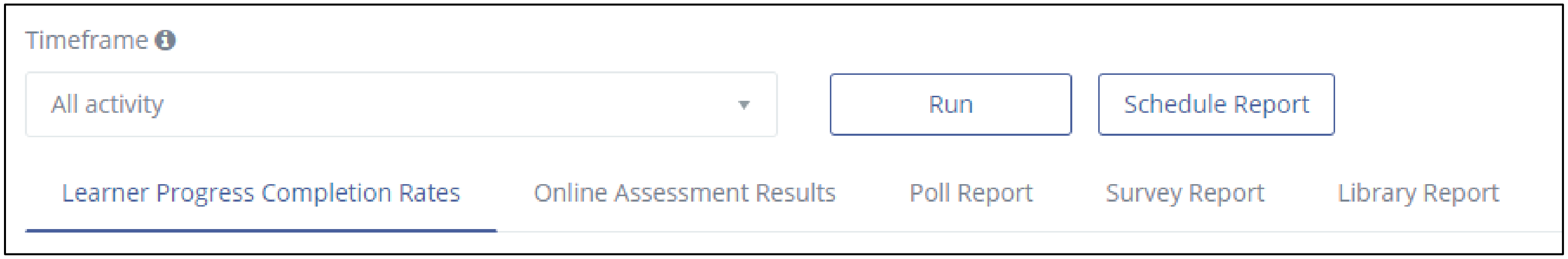
Calendar – Creating an Event

When creating a new event, enter the Event Name, Participant Group(s), and the associated Course (if applicable). Times associated with this event should be included in the Description. Select a Start and End date and then **Save** your event. When editing an event, you will have the same fields with the added option to delete the event.

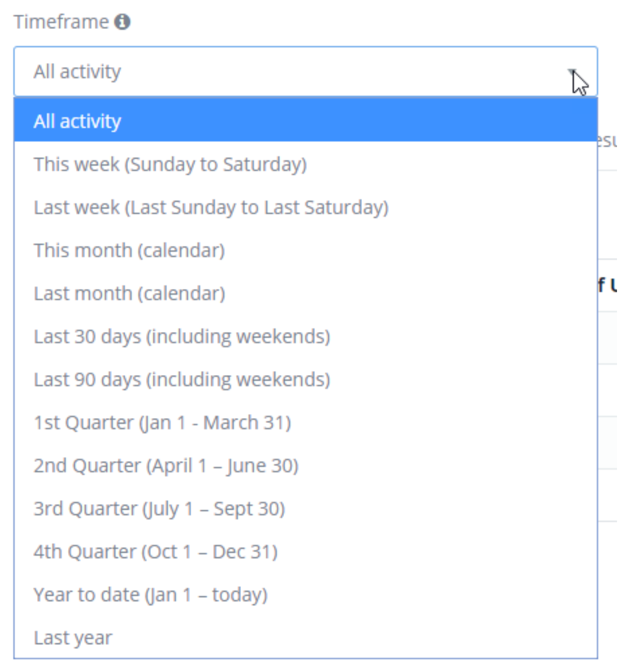


Reports

Select **Reports** from the top navigation bar to view Learner Progress & Completion Rates, Online Assessment Results, Poll Results, Survey Results, and Library Results.



Each report will allow you to view data for a timeframe you specify. Select the desired timeframe and click **Run**. A table with the data will populate for the report selected.

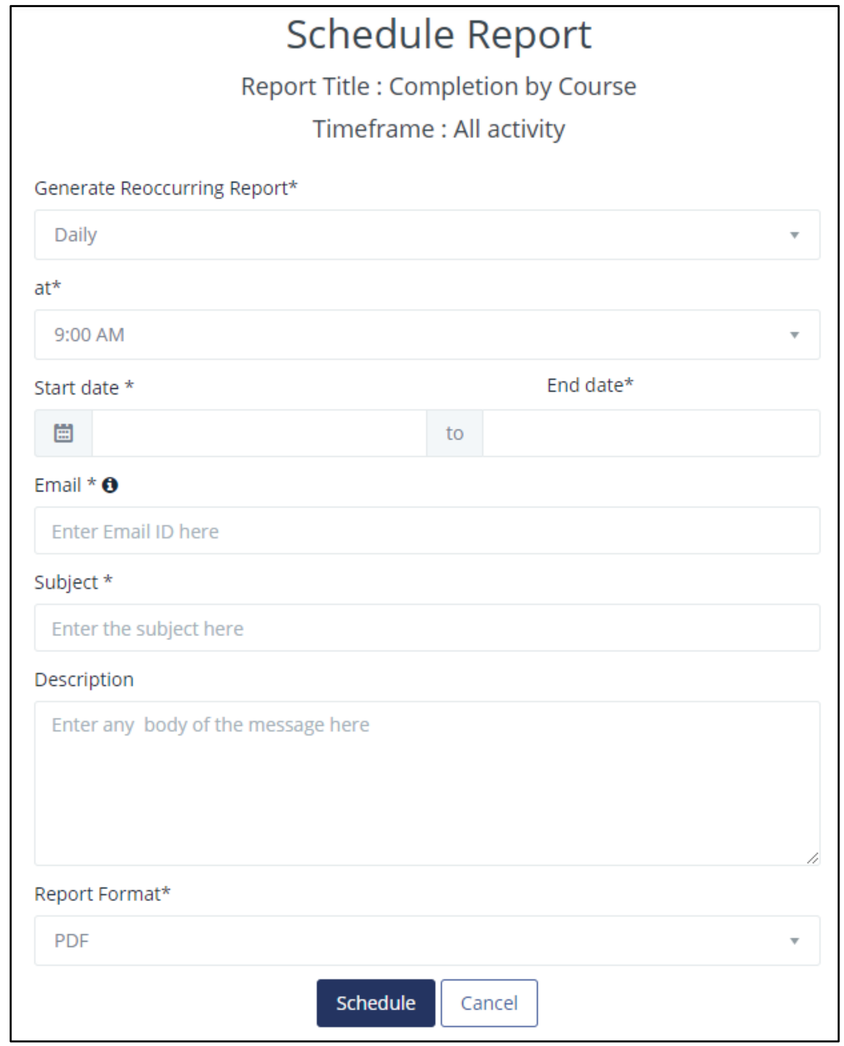


You have the option to export each report as an Excel, CSV, or PDF file.

Reports – Scheduled Reports

For any report, you have the option to schedule a report. Once you have selected the report and timeframe from the main screen, select **Schedule Report**.

- **Generate Reoccurring Report** – options are Daily, Weekly, Monthly, and Yearly. Based on the option you select, you can enter the day of the week, day of the month, month of the year, and time the report will be sent out via email.
- **Start and End Date** – these dates will determine the timeframe to send emailed reports.
- **Email** – here you can list the email address(es) for the recipients of the report. **Note:** Use a comma to separate multiple email addresses. Example: You@outlook.com, Me@outlook.com)
- **Subject** – Enter a subject for the email.
- **Description** – Enter a description for the email.
- **Report Format** – Select the format for the report. (PDF, CSV, XLS, or XLSX)



Click **Schedule** to save your selections.

Learner Progress & Completion Rates

This table displays the Course Name, Editor, # of Users Enrolled, % Completed (Percentage of participants who have completed the course), End Date, and Owner. When you export or schedule a report from this view, it will be titled **Completion by Course**.

Course Name	# of Users Enrolled	% of Users Not Started	% of Users In Progress	% Completed	End Date	Owner
2022 - Cyber Security Training	10	40%	60%	0%	12/31/2022	Liz Walker
2023 - Cyber Security Training (Copy)	10	90%	10%	0%	12/31/2023	Mary Godfrey
Conflict Resolution - 2022	10	80%	10%	10%	12/31/2022	Mary Godfrey

You can select a specific course to drill down to data specific to the participant group. This table displays the Participant Group(s), Percent Rate (Average level of completion by participant group), and Due Date. When you export or schedule a report from this view, it will be titled **Course Completion by Participant Group**.

Back

Budgets and Financial Reports

Search

Participant Groups	Percent Rate	Due Date
August Orientation	0%	09/02/2019
Change Management	17%	09/02/2019
Logan's Group	33%	09/02/2019

Previous 1 Next

You can select a specific participant group to drill down to view Participant Name(s), % Completed, Last Accessed, and Email. When you export or schedule a report from this view, it will be titled **Course Completion by Participant**.

Back

Participant Name	% Completed	Last Accessed	Email
Emily Participant	30%	08/28/2019	ts_p1@mailinator.com
Gayla Participant	0%	08/13/2019	ts_p2@mailinator.com
Jennifer Participant	0%		ts_p4@mailinator.com
Victory Participant	0%		ts_p3@mailinator.com

Previous 1 Next

Online Assessment Results

This table displays the Course Name, Quiz Name, Quiz Type, Quiz Average, and Owner. You have the option to filter by Quiz Type to view **Course** Quizzes, **Organizational** Quizzes, or **All**. When you export or schedule a report from this view, it will be titled **Average Grade by Quiz**.

Quiz Type: All | Search

Course Name	Quiz Name	Quiz Type	Quiz Average	Owner
Budgets and Financial Reports	Module Two Quiz	Course	100%	Logan Trainer
Budgets and Financial Reports (Copy)	Module Two Quiz	Course	0%	Megan Admin
N/A	Commonly Used Terms	Organizational	75%	Kate Admin

Previous 1 Next

You can select a specific quiz to drill down to data specific to the participant group. This table displays the Participant Name, Participant Group, Quiz Score (This score reflects the "Best Score" or "Last Score" based on the criteria set when the quiz was created. The "Taken On" date is associated with the recorded score.), Attempts, and Taken On. When you export or schedule a report from this view, it will be titled **Quiz Score by Participant Group**.

Search

Participant Name	Participant Group	Quiz Score	Attempts	Taken on
Emily Participant	Everyone	100	1	08/15/2019
Logan Trainer	Everyone	100	1	08/05/2019
Maxine Trainer	Everyone	100	1	08/06/2019
Megan Admin	Everyone	0	1	08/15/2019

Previous 1 Next

Poll Report

This table displays the Course Name (if applicable), Poll Name, Poll Type, # of Responses, and Owner. You have the option to filter by Poll Type to view only **Course** polls, **Organizational** polls, or **All**. When you export or schedule a report from this view, it will be titled **Polls**.

Poll Type All Search

Course Name	Poll Name	Poll Type	# of Responses	Owner
Budgets and Financial Reports	Course Benefit	Course	0	Megan Admin
N/A	Commonly Used Terms	Organizational	3	Kate Admin
N/A	Change Management Models	Organizational	3	Megan Admin
N/A	Lunch and Learn Menu	Organizational	1	Megan Admin
N/A	Change Management Models	Organizational	1	Megan Admin

Previous 1 Next

You can select a specific poll to drill down to data specific to the participant group. This table displays the Participant Name, Response, and Poll Date. When you export or schedule a report from this view, it will be titled **Poll Responses.**

Search

Participant Name	Response	Poll Date
Emily Participant	Comfortable	08/14/2019
Gayla Participant	Uncomfortable	08/15/2019
Logan Trainer	Comfortable	08/05/2019

Previous 1 Next

Survey Report

This table displays the Course Name (if applicable), Survey Name, Survey Type, # of Responses, and Owner. You have the option to filter by Survey Type to view only **Course** surveys, **Organizational** surveys, or **All**. When you export or schedule a report from this view, it will be titled **Surveys**.

Survey Type: All | Search

Course Name	Survey Name	Survey Type	# of Responses	Owner
Micro-Course: Gaining Support	Pre-Test	Course	0	Megan Admin
N/A	Key Players	Organizational	2	Kate Admin

Previous 1 Next

You can select a specific survey to drill down to data specific to the participant group. This table displays the Participant Name, Response, and Survey Date. When you export or schedule a report from this view, it will be titled **Survey Responses.**

Participant Name	Survey Date
Emily Participant	08/14/2019
Logan Trainer	08/05/2019

You can select a specific participant to drill down to data specific to the participant. This table displays the Participant Name, Response, and Survey Date. When you export or schedule a report from this view, it will be titled **Survey Responses.**

Question	Type	Response	Date
Choose three key players you feel use financial data in the organization.	Multiple Response	1 - CFO 2 - Senior Leadership 3 - HR Department	08/14/2019

Library Report

This table displays the Category, Library Doc Name, Date Added, Date Updated, Last Accessed, Expiration Date, and Access Attempts. When you export or schedule a report from this view, it will be titled **Access Library Document**.

Search

Category	Library Doc Name	Date Added	Date Updated	Last Accessed	Expiration Date	Access Attempts
Change Management Facilitator Materials	Before We Get Started	08/05/2019	08/13/2019	08/05/2019	12/31/2019	11
Change Management Facilitator Materials	Action Plan	08/05/2019	08/26/2019	08/05/2019	12/31/2019	13
Change Management Facilitator Materials	Change Management Audio Book	08/05/2019	08/13/2019	08/05/2019	12/31/2019	19
Change Management Facilitator Materials	Training Manual	08/05/2019	08/05/2019	08/05/2019	08/12/2019	5
Change Management Facilitator Materials	Facilitator Guide	08/05/2019	08/13/2019	08/05/2019	12/31/2019	18
Change Management Facilitator Materials	Change Management Models	08/05/2019	08/13/2019	08/05/2019	12/31/2019	6
Change Management Facilitator Materials	Change Management Infographic	08/05/2019	08/13/2019	08/05/2019	12/31/2019	14
Course 1	Special Character	08/20/2019	08/20/2019	08/20/2019	08/27/2019	2

Previous 1 2 Next

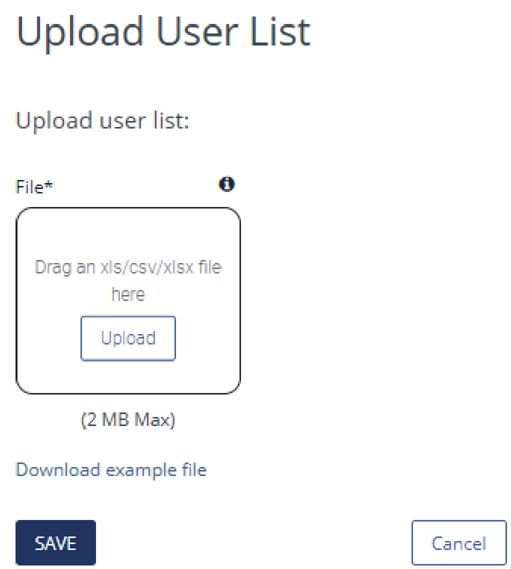
Users/Groups

User List Upload

Select **User/Groups>User List Upload** from the top navigation bar to load numerous users at one time. For this process, you will upload an **XSLX** or **CSV** that is populated with the users' First Name, Last Name, Email, Phone, and Role. The user Role should be either **Admin**, **Trainer**, or **Participant**. You can add a Job Title, Manager, Department, or Region for each participant.

	A	B	C	D	E	F	G	H	I	J	K	L
1	First Name*	Last Name*	Email*	Phone	Role*	Job Title	Manager	Department	Region			
2												

Once users are successfully uploaded, they will receive an automatic welcome email that will contain their Username and Password for the portal and/or mobile application. If the user does not receive the email within a few minutes, please have them check their Spam or Junk folders.



Warning: If you need to add an additional group of users, create a new spreadsheet with only new users. Editing a previously uploaded spreadsheet will not overwrite data that has already been added to the system.

Web Portal Training Series – Upload a User List: Click here to watch a video on how to create and upload a user list. (video length – 3:08 minutes)

User List Upload - Requirements

Warning: If the user list upload fails, ensure:

There are no special characters as part of the file name.

The file type is XLSX or CSV.

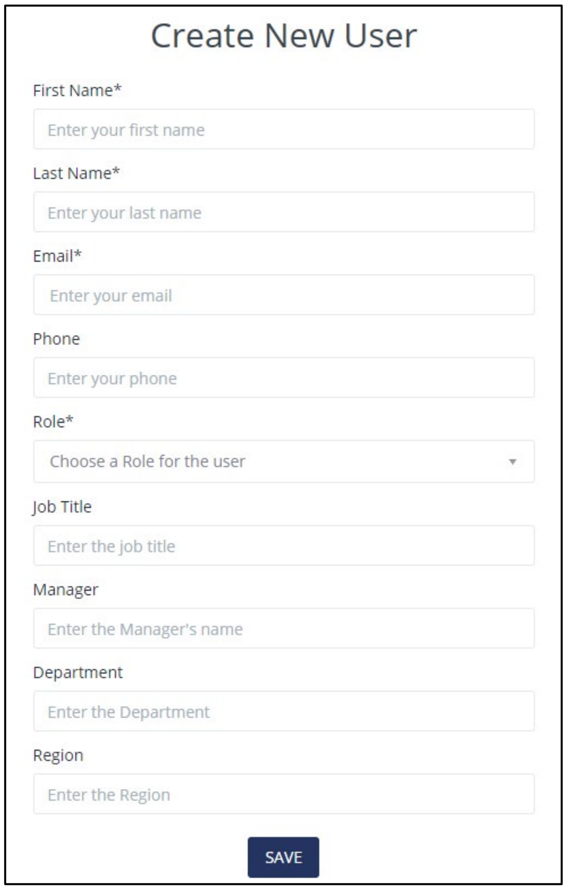
There are no duplicate emails or emails for users that already exist in the system.

No required fields are missing.

The role is assigned as either Admin (not Administrator), Trainer, or Participant.

Creating a User

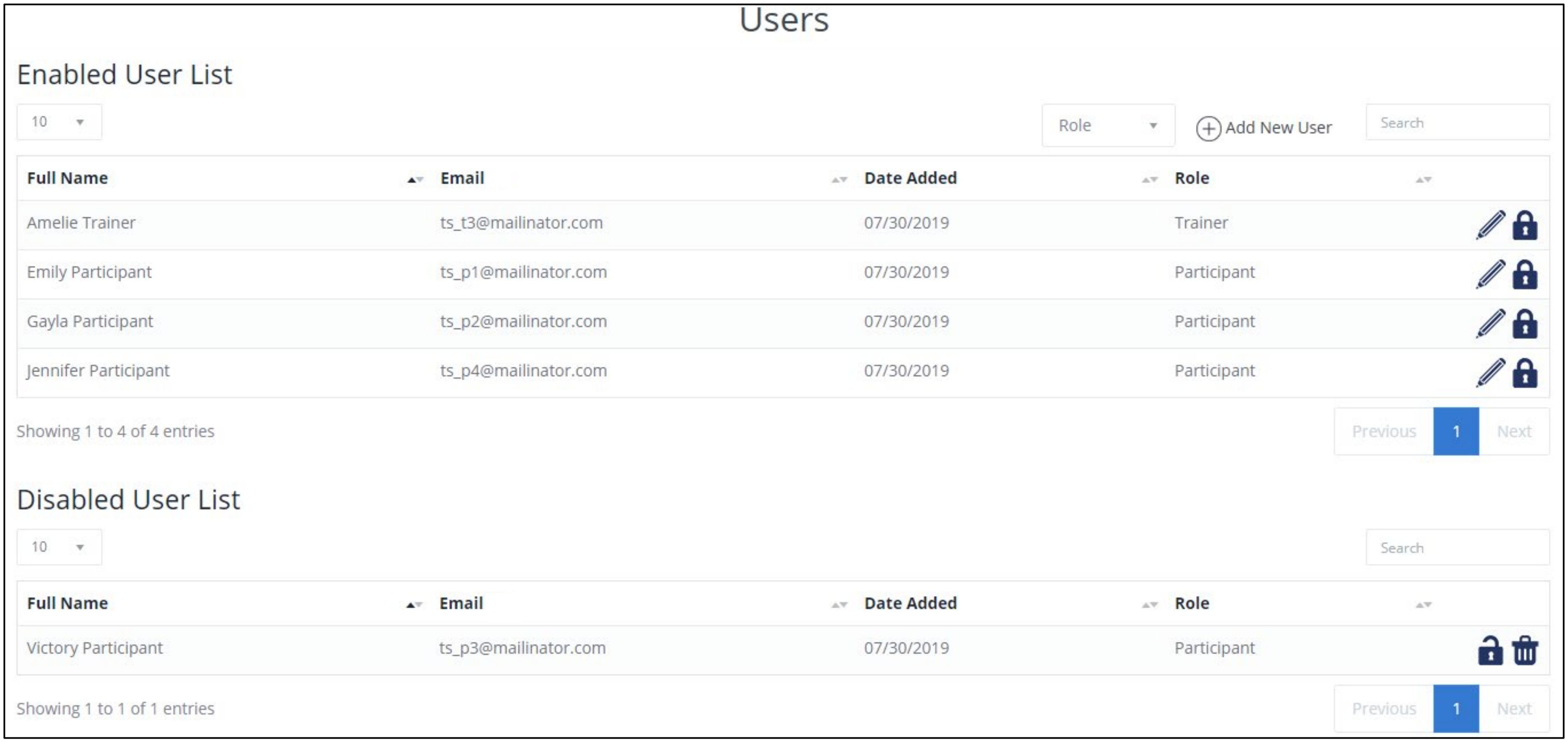
Select **User/Groups>Create a User** from the top navigation bar to add an individual user. You will have the same options as found on the basic user upload form. Remember, Role should be either **Admin**, **Trainer**, or **Participant**. **Note:** All items with an asterisk are required**.** Click **Save** to save the new user. **Note:** Once the user is successfully uploaded, they will receive an automatic welcome email that will contain their Username and Password for the portal and/or mobile application. If the user does not receive the email within a few minutes, please have them check their Spam or Junk folders.



Web Portal Training Series – Create a User: Click here to watch a video on how to create a new user.
(video length – 2:48 minutes)

User List Screen

To access a list of users, select the **User/Groups>User List** menu option. Here you can view all Enabled and Disabled users in the organization. The column headers include the Full Name, Email, Date Added, and Role. You have the option to filter by Role to view **Participants**, **Trainers, Admins,** or **All**. From this screen, you can also **Add New User** by clicking on the plus sign.

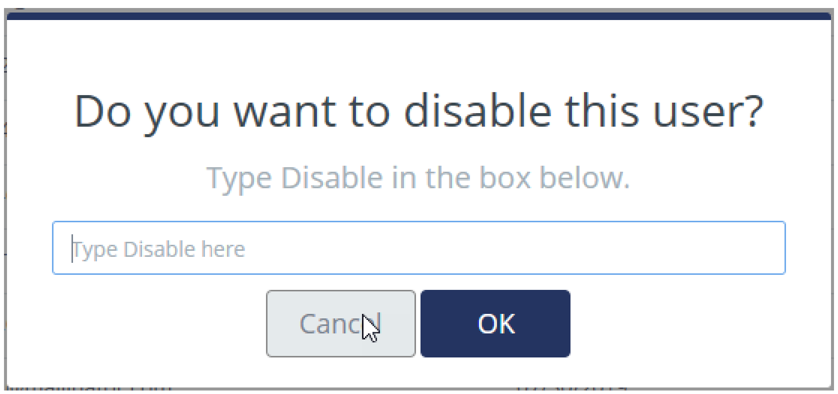


User List - Enabled & Disabled List

For Enabled users, you have the option to:

- **Edit user** - select the pencil icon to edit user properties.
- **Disable user** - select the lock icon to disable the user.
  - Type the word "Disable" into the text field.
  - Click OK.
  - Click OK again when the success message appears.

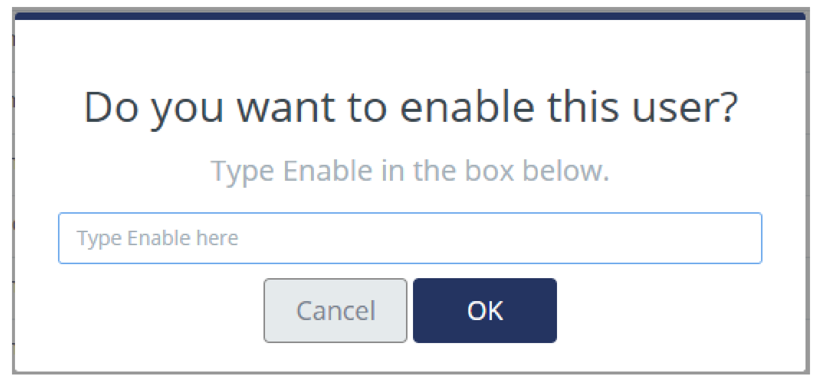
The disable icon will change to the enable icon (open lock) and appear in the Disabled Users table.



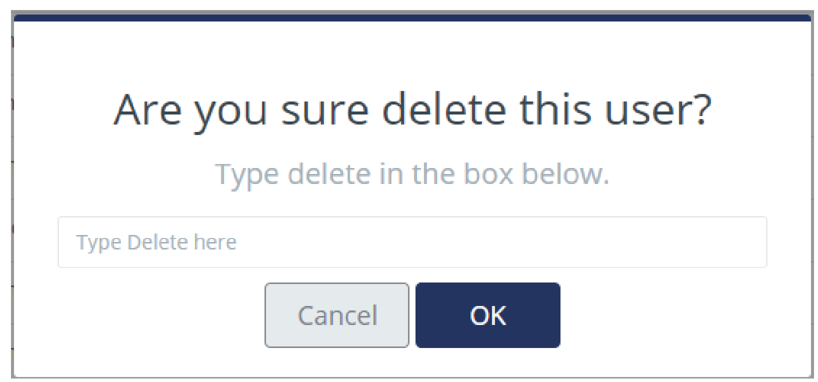
- **Resend Email** - select this option to send a new welcome email to a user. This email will contain a new auto-generated password.

For Disabled users, you have the option to:

- **Enable user** – select the enable icon and follow the same process to Enable.



- **Delete user** - select the trash icon and follow the same process to Delete.

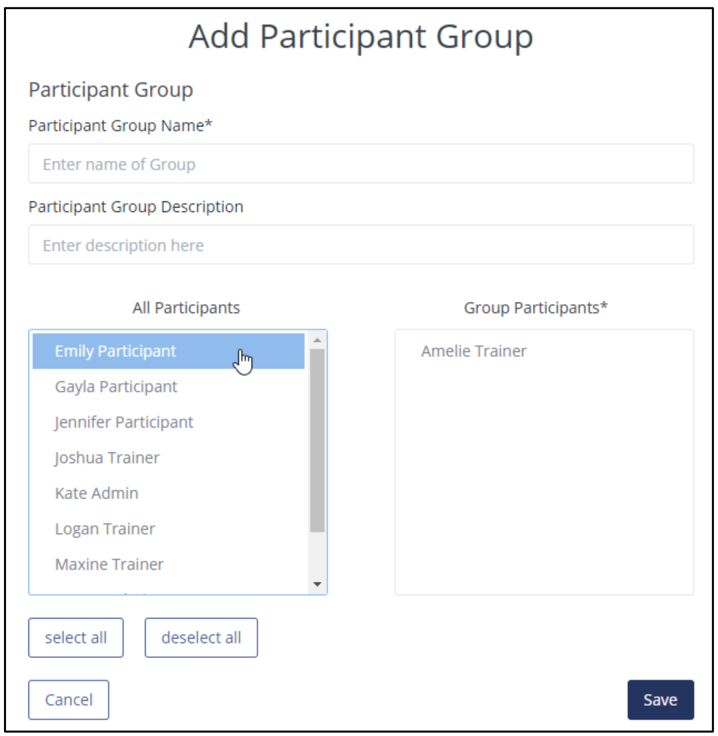


Creating a Participant Group

Select **User/Groups>Create Participant Group** from the top navigation bar to create a new participant group. Creating participant groups allows the Administrator to set-up group-based security for courses, library items, quizzes and polls/surveys. This ensures that one participant group cannot access or view documents from other participant groups.

Enter the **Participant Group Name** and **Description**. **Note:** The Participant Group Description will not show up in the mobile application. All participants appear on the left. Select a participant to add them to the **Group Participants** column. Select a participant from the **Group Participants** column to remove from the group. Click **Save** to save your choices.

Best Practice Tip: Remember to add yourself and any assigned editor to the participant group to view materials in the mobile app.

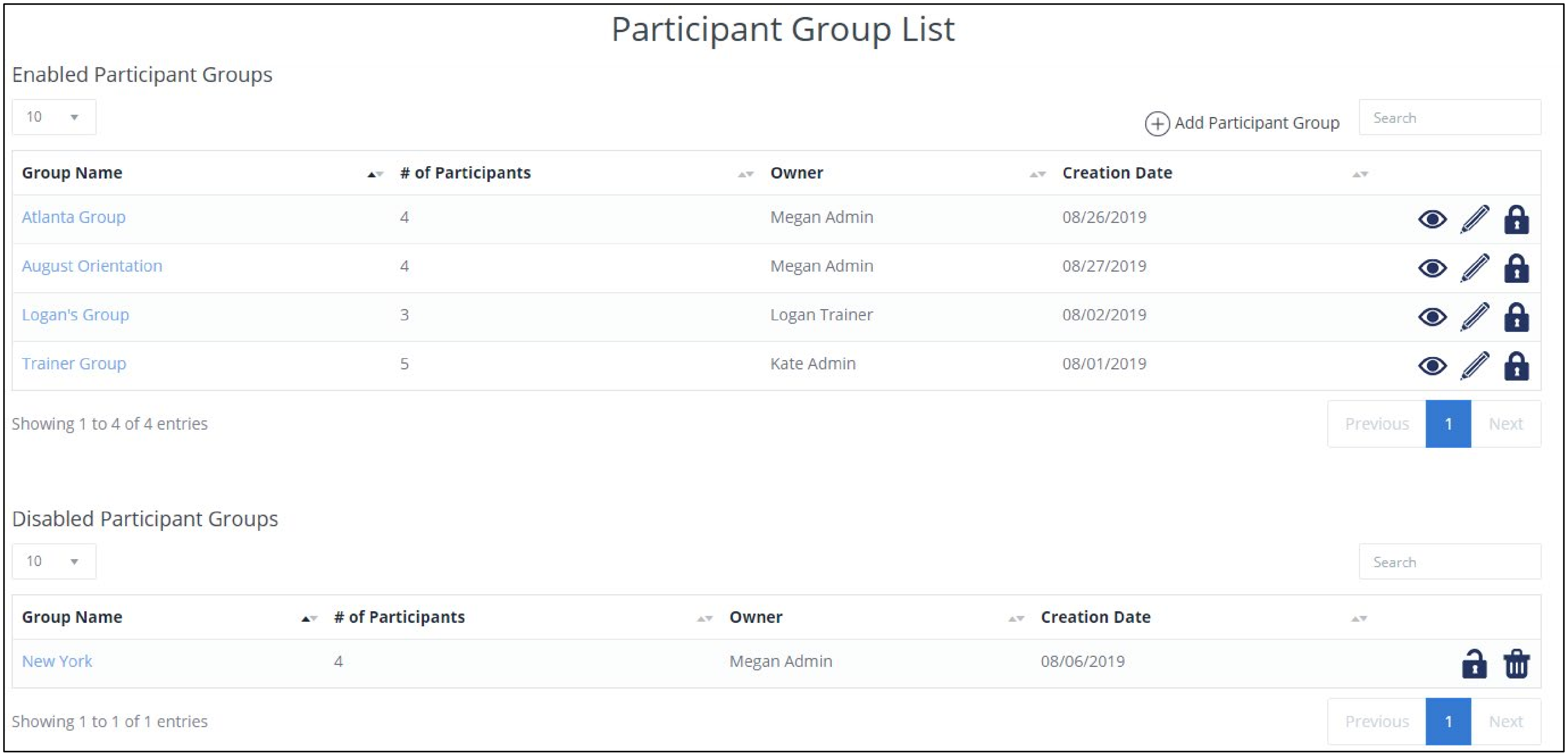


Web Portal Training Series – Create a Participant Group: Click here to watch a video on how to create a participant group.

(video length – 3:33 minutes)

Participant Group List

To access a list of all participant groups, select the **User/Groups>Participant Groups** menu option. Here you can view all Enabled and Disabled participant groups in the organization. The column headers include the Group Name, # of Participants, Owner, and Creation Date. From this screen, you can also **Add Participant Group**.



Participant Group List

Enabled Participant Groups

10 | Add Participant Group | Search

Group Name	# of Participants	Owner	Creation Date
Atlanta Group	4	Megan Admin	08/26/2019
August Orientation	4	Megan Admin	08/27/2019
Logan's Group	3	Logan Trainer	08/02/2019
Trainer Group	5	Kate Admin	08/01/2019

Showing 1 to 4 of 4 entries | Previous 1 Next

Disabled Participant Groups

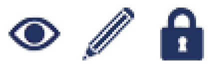
10 | Search

Group Name	# of Participants	Owner	Creation Date
New York	4	Megan Admin	08/06/2019

Showing 1 to 1 of 1 entries | Previous 1 Next

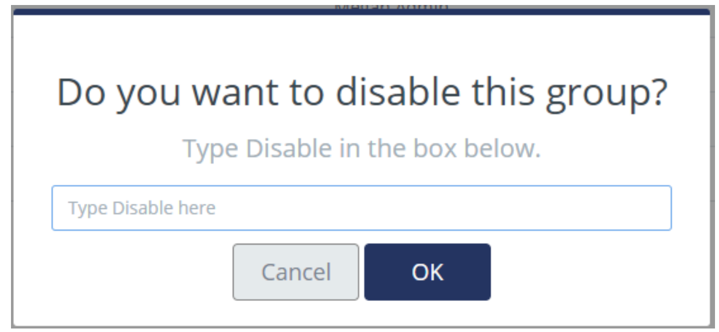
Participant Groups – View, Edit, & Disable

For Enabled participant groups, you have the option to:



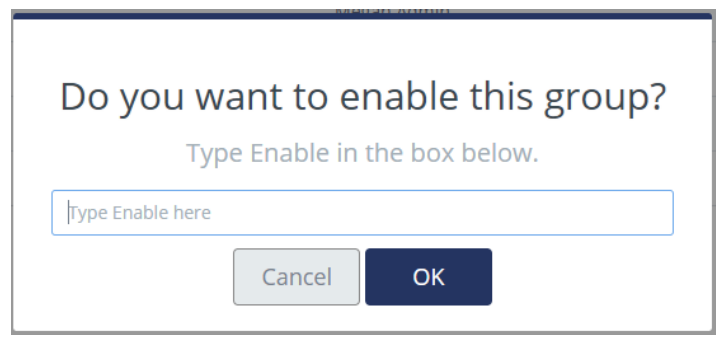
- **View –** select the eye icon to see the participants in the group. Here you can also remove participants by clicking on the trash icon.
- **Edit**– select the pencil icon to edit participant group properties.
- **Disable**– select the lock icon to disable the participant group.
    - Type the word “Disable” into the text field.
    - Click OK.
    - Click OK again when the success message appears.

The disable icon will change to the enable icon (open lock) and appear in the Disabled Users table. **Note:** Data for this user will not show up in reports while disabled.



For Disabled participant groups, you have the option to:

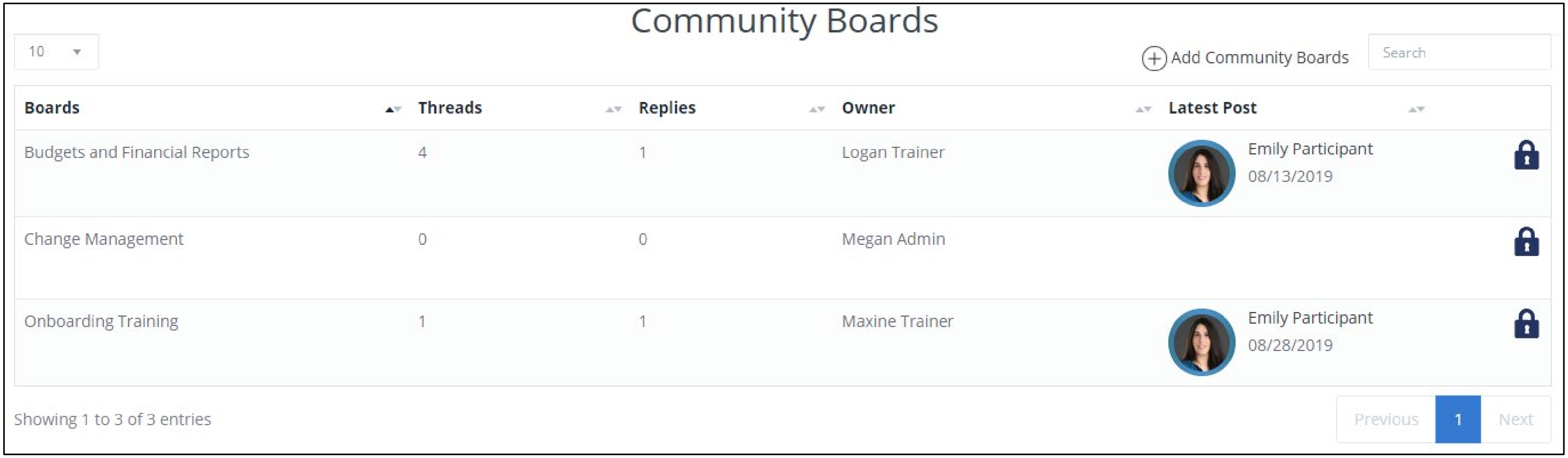
- **Enable** – select enable icon and follow the same process to Enable.



Note: Participant Groups cannot be deleted.

Community Board

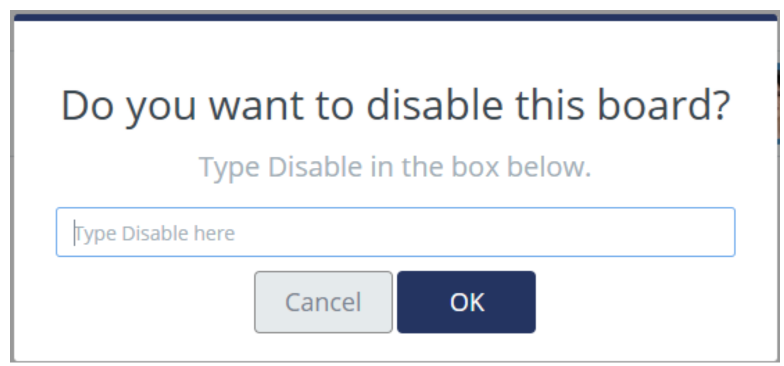
To access a list of all community boards, select the **Community Board** menu option. Here you can view all Enabled and Disabled community boards in the organization. The column headers include the Boards, Threads, Replies, Owner, and Latest Post. From this screen, you can also **Add Community Boards**.



Select the lock icon to disable a community board.

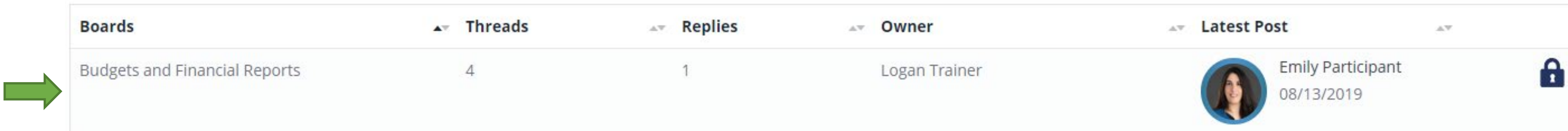
- Type the word "Disable" into the text field.
- Click OK.
- Click OK again when the success message appears.

The disable icon will change to the enable icon (open lock). Click the enable icon and follow the same process to Enable.

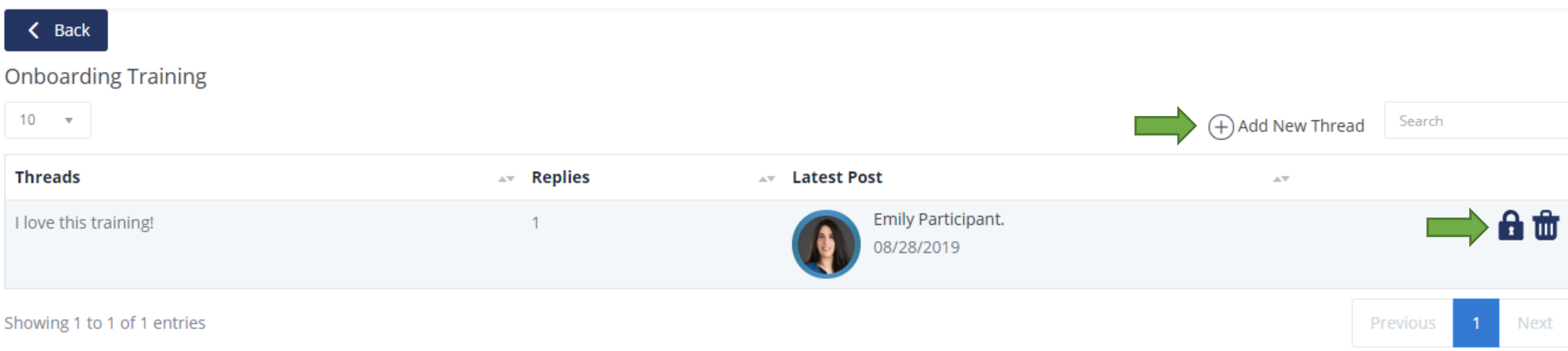


Community Board – Management of Threads and Posts

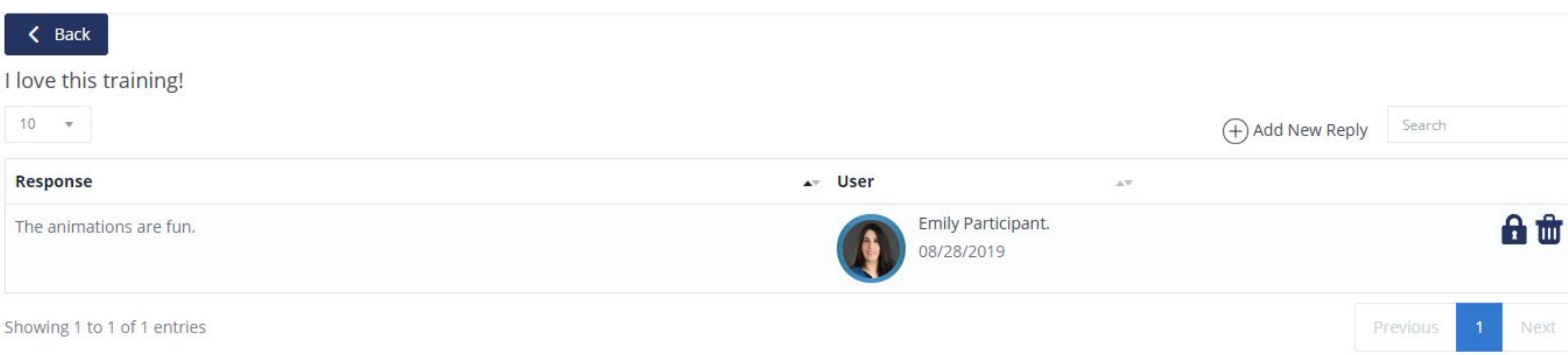
Click on the community board title for which you need to manage.



Clicking on the community board name will drill down to display details about individual threads. You have the option to **Add New Thread** from this view. Here you can delete or disable a specific thread.



Clicking a thread title will drill down further to display details about individual posts. You have the option to **Add New Reply** from this view. Here you can delete or disable a specific reply.



Organization

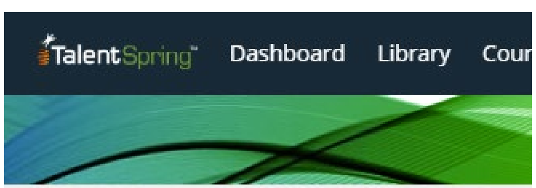
Organizational Setup

Select **Organization>Organization Setup** from the top navigation bar to edit your organization details, including the Organization Name, Address, Phone, and Email. You can **Add Point of Contact** or edit the Name, Phone, or Email of any existing point of contact.

You can select Off next to **Allow Gamification**, to remove the Leaderboard and Badges and Points options from the web portal and mobile application. If gamification is turned off, this featurewill also be omitted from the course setup process. Turning it back to on will restore any points assigned. **Note:** Gamification is only available for Spring Above and Beyond subscription plans.

You can select the **Organization Time Zone**.

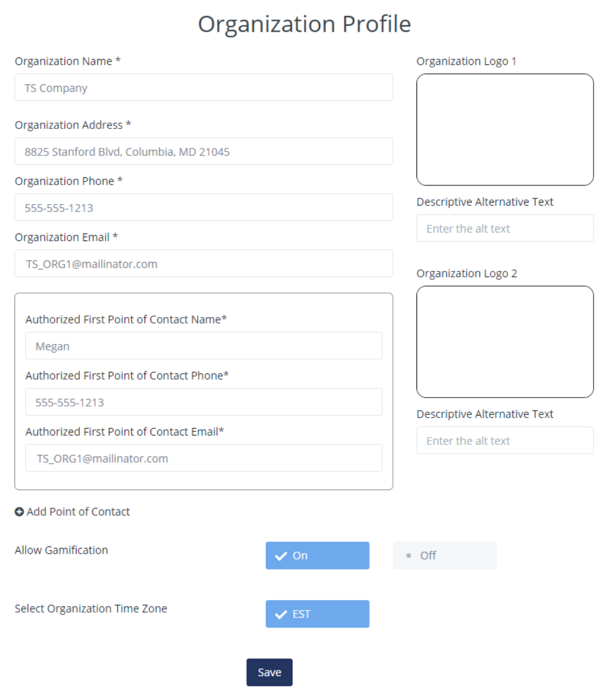
You can upload your company logo in the Organization Logo 1 section to appear in the top left of the web portal. **Note:** This is only available for the Spring Above and Spring Beyond subscription plans.



To upload your logo files, select Upload, browse for the file and click on open, or, drag the file from its location to the portal. File formats that can be uploaded are **JPEG** and **PNG**.

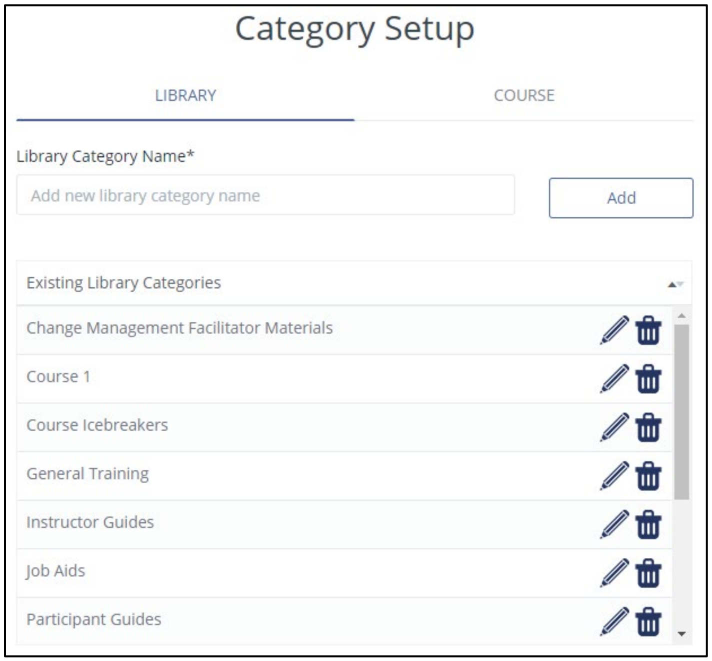
Follow the same steps for adding an Organization Logo 2. This logo will appear on the autogenerated emails from TalentSpring™

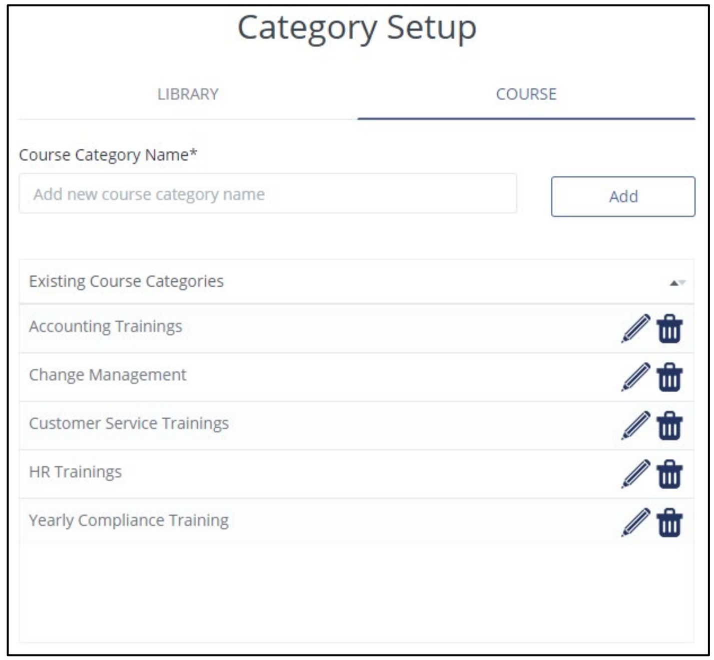
Click **Save** to update your changes.



Category Setup

Categories are used to organize library and course documents and files. Select **Organization>Category Setup** from the top navigation bar to create a new Library or Course category. Enter a unique library/course category name and click **Add**. Your new category will appear in the list. You have the option to Edit or Delete existing library/course categories.





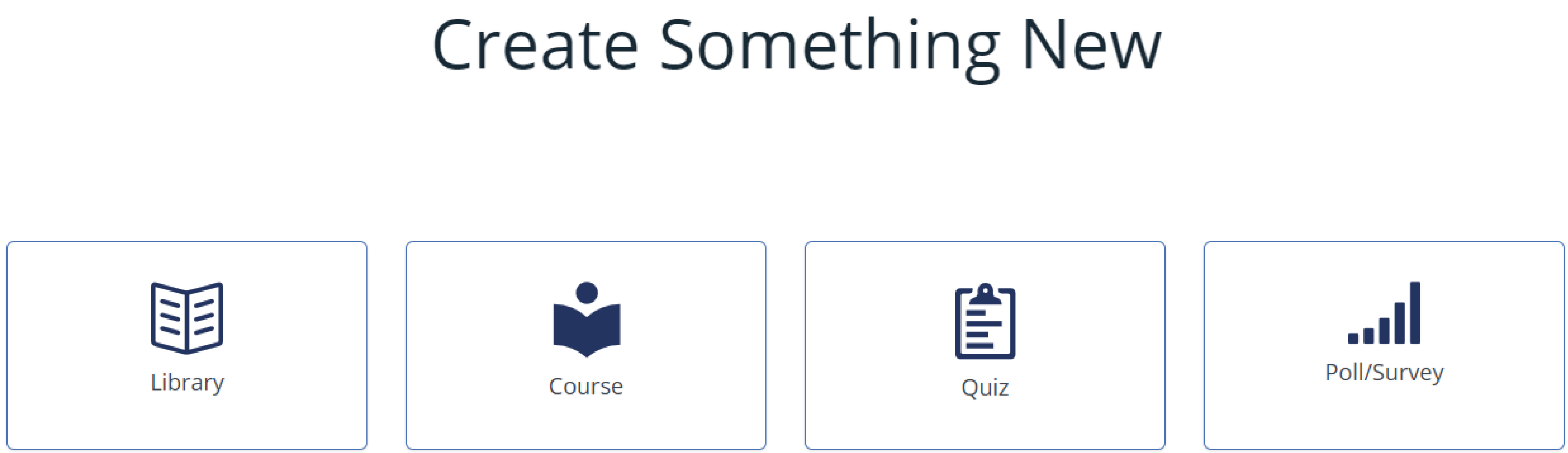
Warning: Use caution when deleting library/course categories as they are available to other Trainers/Admins in the organization and may be in use.

If a category is deleted, any courses or library items will be listed as Uncategorized. To update the category, simply select the edit icon and choose a category from the drop-down. (See **Creating a Course – General Course Information** or **Creating a Library Item**.)

Web Portal Training Series – Create a Category: Click here to watch a video on how to create a participant group. (video length – 1:48 minutes)

Create

Select **Create** from the top navigation bar to create a new Library item, Course, Quiz, Poll, or Survey.



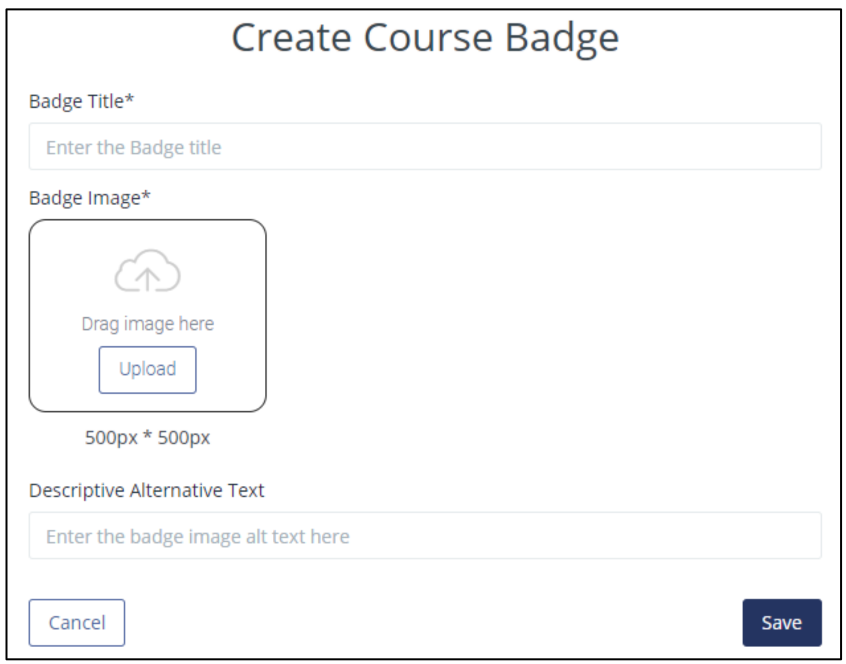
Badge Management

Create New Badge

This section of the Administrator portal allows you to create custom course badges for your Organization. To start, select **Badge Management>Create New Badge** from the top navigation bar to create a new course badge. Enter a badge title. To upload a file, select Upload, browse for the file and click on open, or, drag the file from its location to the portal. File formats that can be uploaded are **JPEG** and **PNG**.

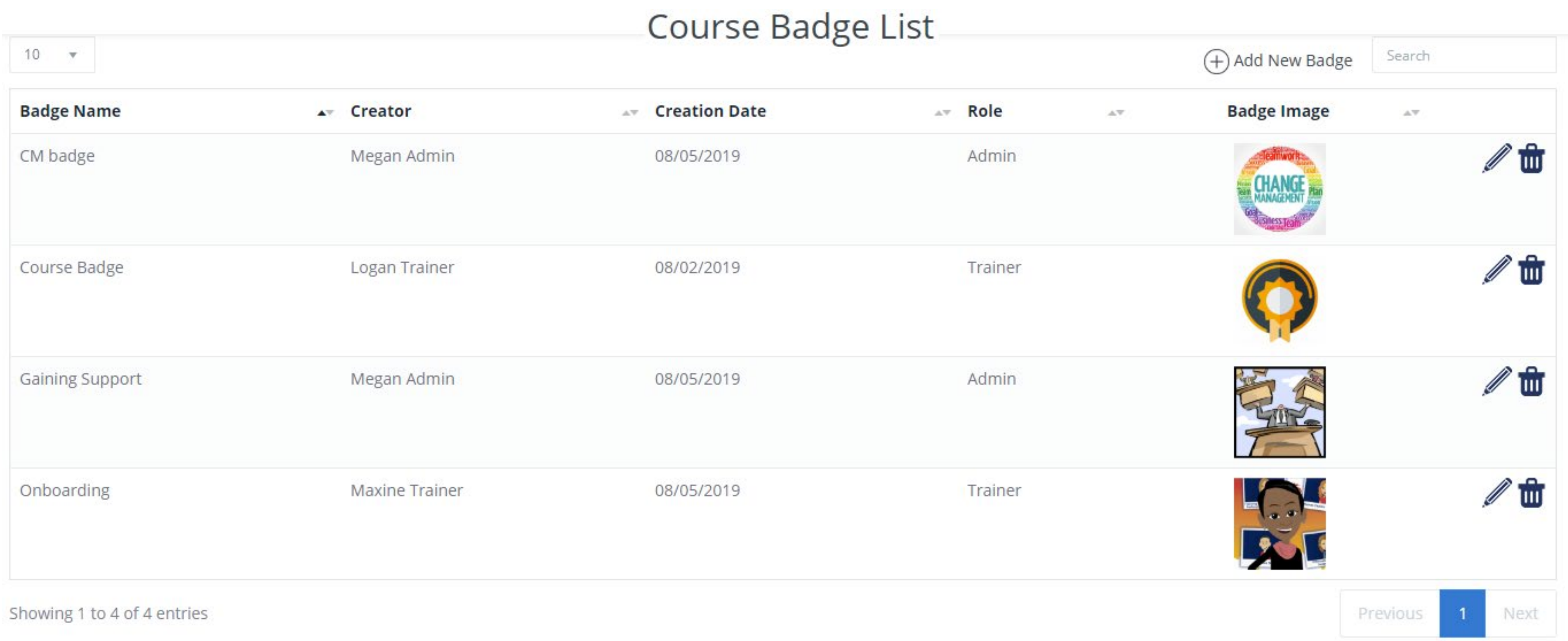
Warning: Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.

For best results, ensure that the uploaded image is 500 pixels x 500 pixels. You can add descriptive alternative text to images for users reading with assistive technology. Once you click **Save**, your image will be available to select from the list of Organizational Course Badges for other Administrators and Trainers to use.

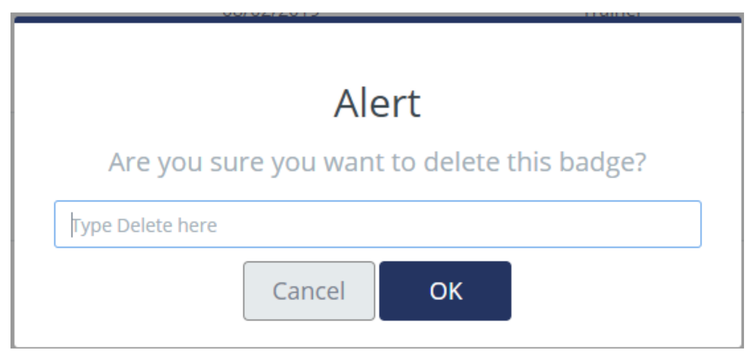


Organizational Badge List

To access a list of all organizational course badges, select the **Badge Management>Organization Badge List** menu option. Here you can view all course badges created by Administrators and Trainers. The column headers include the Badge Name, Creator, Creation Date, Role, and Badge Image. From this screen, you can also **Add New Badge**. You have the option to Edit (pencil icon) or Delete (trash icon) existing course badges.

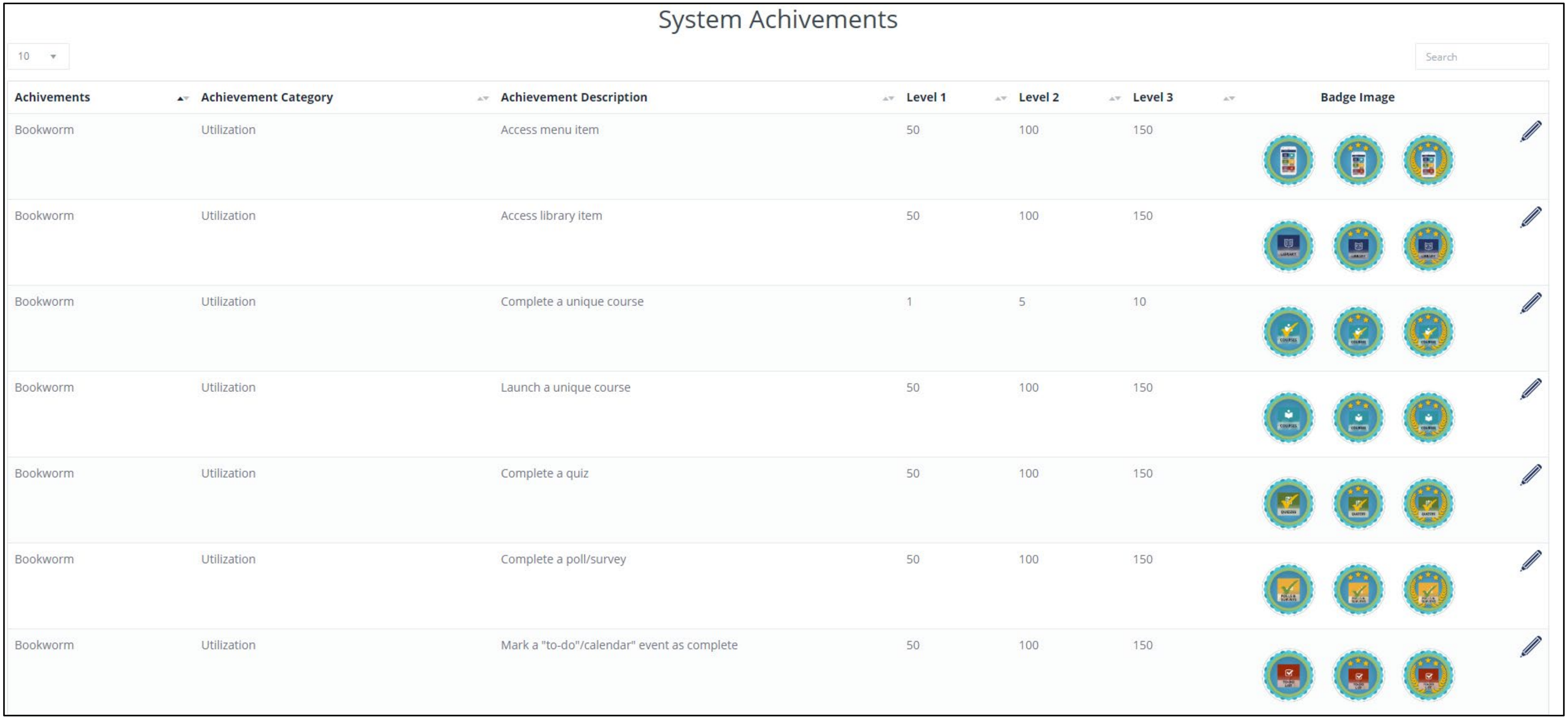


Warning: Use caution when deleting badges as they are available to other Trainers/Administrators in the organization and may be in use.



System Achievements

System badges are preset within TalentSpring. To access a list of all system badges, select the **Badge Management>System Achievements** menu option. Here, you can view all badges that are awarded by the system when functional achievements are met by the participant. The column headers include the Achievements (nickname), Achievement Category, Achievement Description, Levels, and Badge Image. You have the option to Edit system badges.



System Achivements

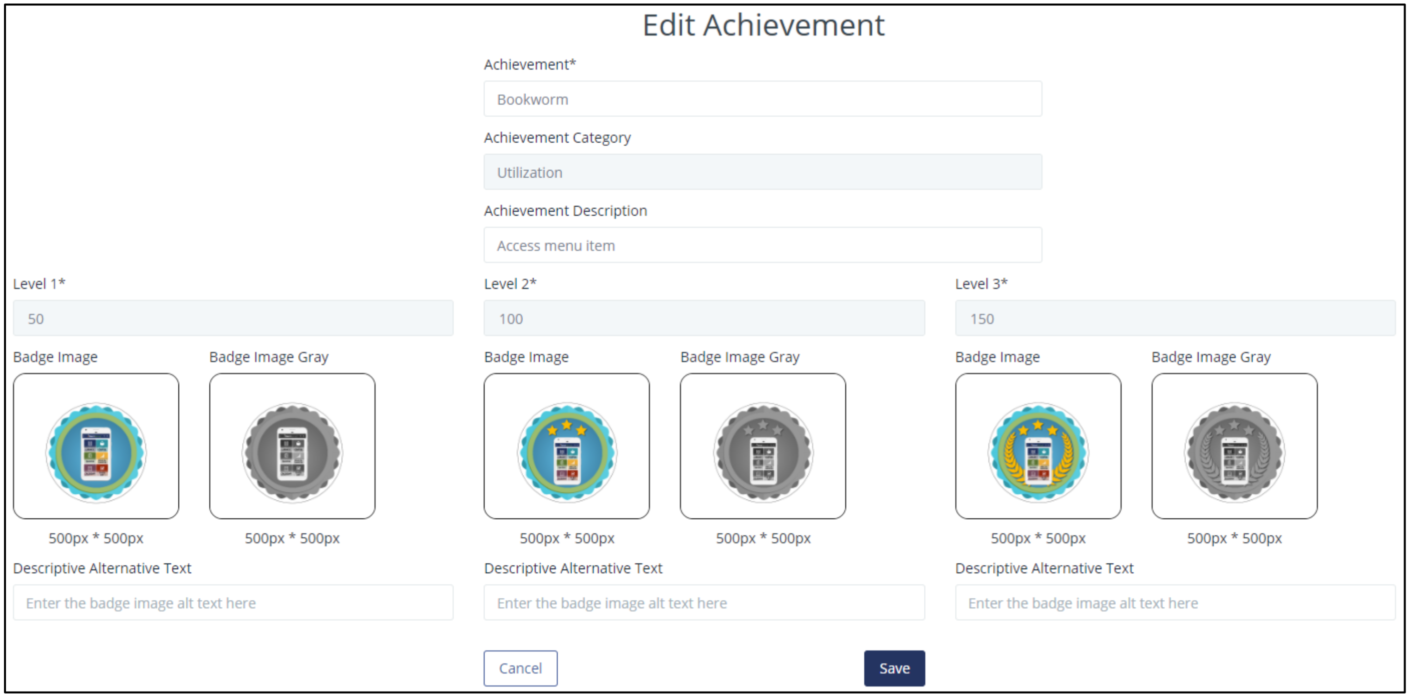
10

Search

Achivements	Achievement Category	Achievement Description	Level 1	Level 2	Level 3	Badge Image
Bookworm	Utilization	Access menu item	50	100	150	
Bookworm	Utilization	Access library item	50	100	150	
Bookworm	Utilization	Complete a unique course	1	5	10	
Bookworm	Utilization	Launch a unique course	50	100	150	
Bookworm	Utilization	Complete a quiz	50	100	150	
Bookworm	Utilization	Complete a poll/survey	50	100	150	
Bookworm	Utilization	Mark a "to-do"/calendar" event as complete	50	100	150	

System Achievements - Editing

Once you click the Edit (pencil) icon, you can provide a new name and update the description for the achievement. **Note:** Changing the description will not change the system functionality, only the way it is described in the system badge list on the administrator portal/mobile application.



To change a badge image, select the image, browse for the file, and click on open, or, drag the file from its location to the portal. File formats that can be uploaded are **JPEG** and **PNG**.

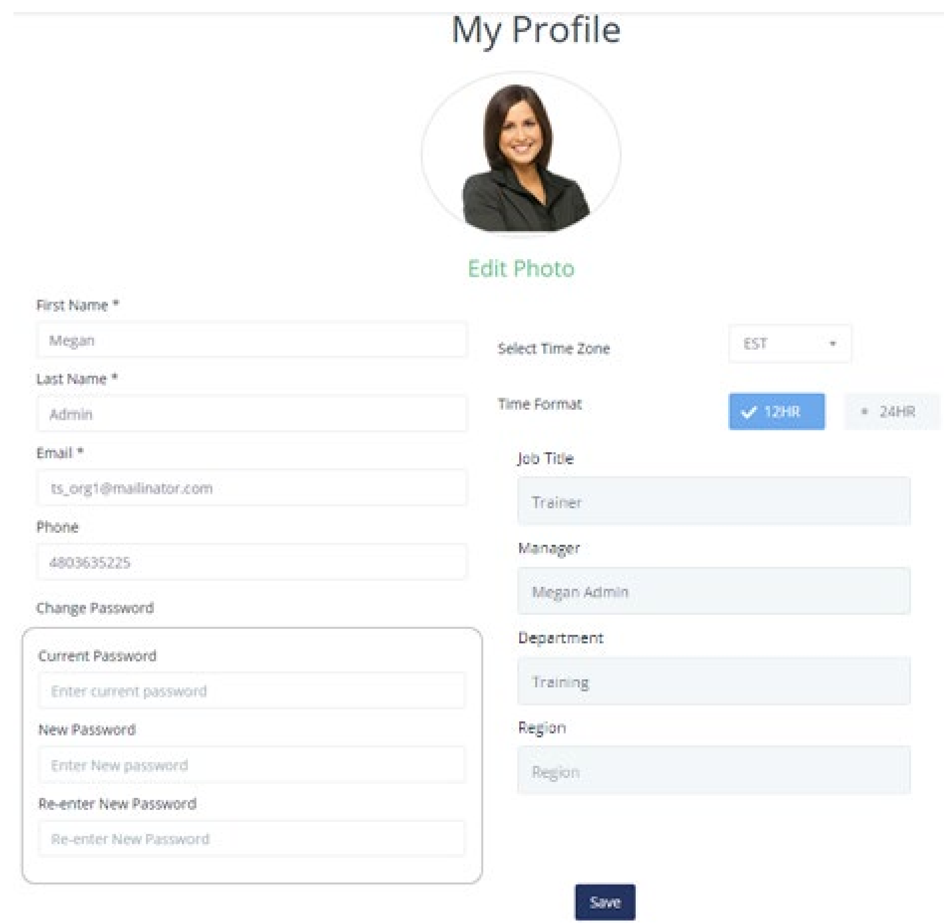
Warning: Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.

For best results, ensure that the uploaded image is 500 pixels x 500 pixels. You can add descriptive alternative text to images for users reading with assistive technology.

Profile

Select **Admin/Profile** from the top navigation bar to edit your profile.

- **Edit Photo** – To upload a file, select Upload, browse for the file, and click on open, or, drag the file from its location to the portal. File formats that can be uploaded are **JPEG** and **PNG**.
- **First Name** – first name as it will appear to others.
- **Last Name** – last name as it will appear to others.
- **Email** – official email on file with the organization. This email is used as your username when accessing the web portal and mobile application.
- **Phone** – any SMS text messages will be sent to this number.
- **Change Password** – here, you can change your password. Enter a new password (10-digits) and then re-enter the new password.
- **Set Time Zone** – select the time zone for your location.
- **Time Format** – set your preference for a 12HR or 24HR time format.
- **Job, Title, Manager, Department, and Region** – read only fields. These fields can be assigned from the initial upload list or edited/assigned from **User/Groups>User List**.



Click **Save** to update your changes.