

WEB PORTAL USER GUIDE

for ADMINISTRATORS



Revision History

Date	Version	Description	Author
9/5/2019	1.0	First draft	E. Copp
9/17/2019	1.1	Review	J. Quinto
10/1/2019	1.2	QA	G. Wright
10/2/2019	1.3	Review	M. Pulliam
10/2/2019	1.4	Edits complete	E. Copp
10/8/2019	2.0	Final approval	M. Pulliam
12/19/2019	2.1	Sustained 1 Phase Updates	E. Copp
12/19/2019	2.2	PM Peer Review	J. Quinto
2/10/2020	2.3	Sustained 2 Phase Updates	E. Copp
2/11/2020	2.4	PM Peer Review	J. Quinto
2/11/2020	2.5	Peer Review Updates	E. Copp
7/21/2020	2.6	Sustained 3 Phase Updates	E. Copp
1/18/2021	2.7	Sustained 4 Phase Updates	E. Copp
1/22/2021	2.8	Peer Review and accepted changes.	J. Quinto
2/1/2021	2.9	Updated peer review changes	E. Copp
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

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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

Track

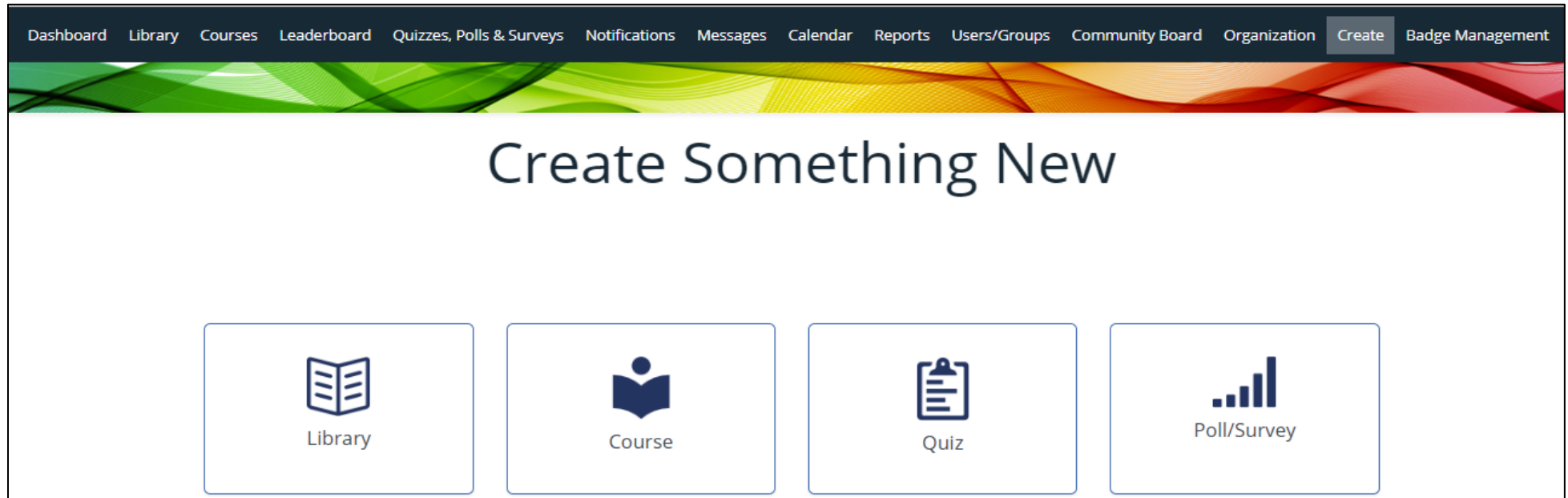
- Learner Progress & Completion Rates
- Online Assessment Results
- Poll & Survey Results
- Library Access

Create

- Library & Course Categories
- Courseware
- Knowledge Base Libraries

View or Send

- Messages
- Calendar Events & To-dos
- Notifications



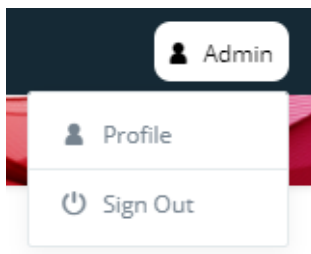
Signing In

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

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

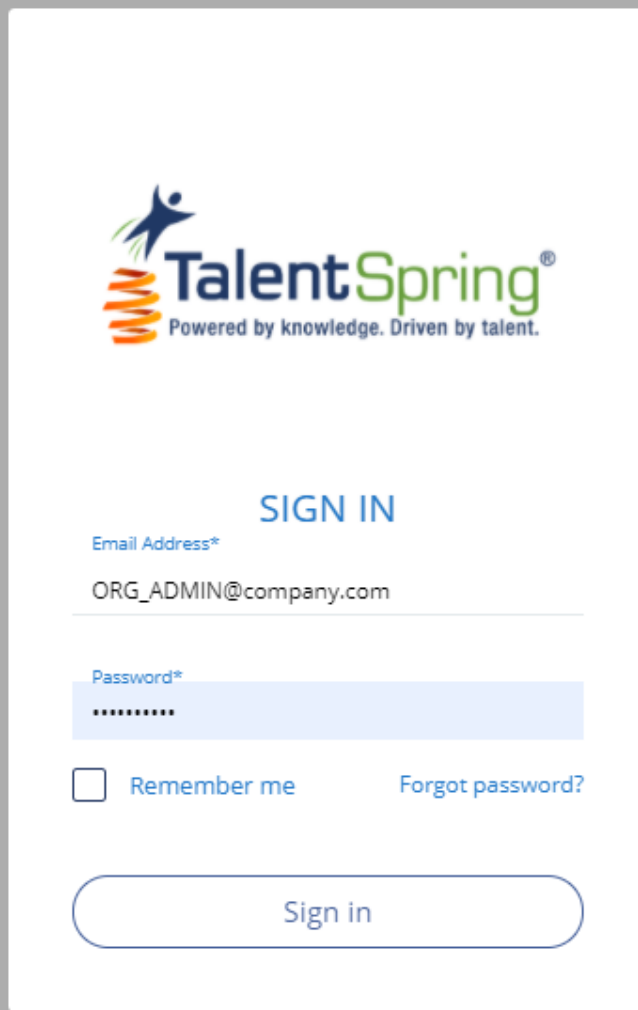
Your username will always be your email address. Once your account is activated, you will receive an email with a temporary 10-digit password. Click [here](#) to sign in to the web portal. Use Chrome or Firefox for optimal performance.

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.

A screenshot of the TalentSpring sign-in page. The page features the TalentSpring logo at the top, which includes a stylized figure and the text 'TalentSpring® Powered by knowledge. Driven by talent.'. Below the logo is a 'SIGN IN' heading. There are two input fields: 'Email Address*' containing 'ORG_ADMIN@company.com' and 'Password*' with masked characters. Below the password field is a 'Remember me' checkbox and a 'Forgot password?' link. At the bottom is a large 'Sign in' button.

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.

TalentSpring
Dashboard
Library
Courses
Leaderboard
Quizzes, Polls & Surveys
Notifications
Messages
Calendar
Reports
Users/Groups
Community Board
Organization
Create
Badge Management

Dashboard

Courses

Show 10 entries Search:

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

Showing 1 to 6 of 6 entries Previous 1 Next

Calendar

« December 2022 »

Mo	Tu	We	Th	Fr	Sa	Su
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Upcoming Trainings/Events

27
DEC
Submit Timesheet

27
DEC
Complete Cybersecurity Training

[View Full Calendar](#)

Messages

Show 10 entries Search:

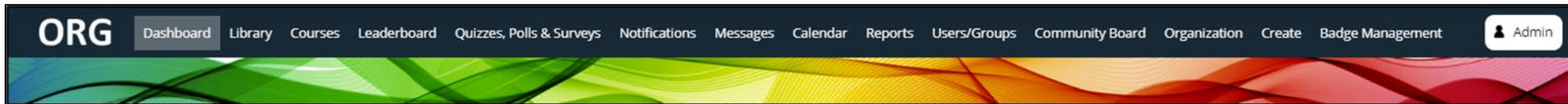
From	Message	Message Date
Fred Russell	I have a question about the training.	05/02/2022

Showing 1 to 1 of 1 entries Previous 1 Next

Navigation

Top Navigation Bar

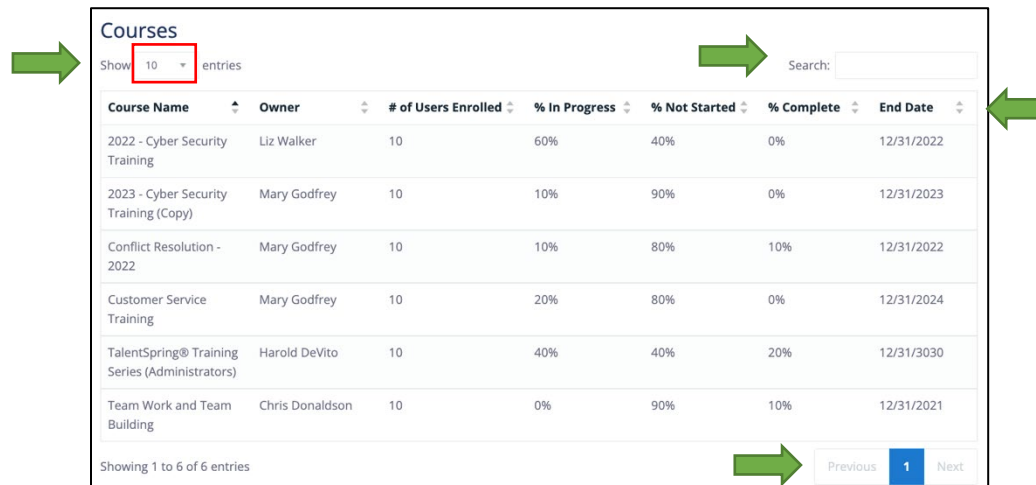
The top navigation bar includes menu and sub-menu options covered in detail throughout this user guide.



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

Showing 1 to 6 of 6 entries

Navigation: Previous 1 Next

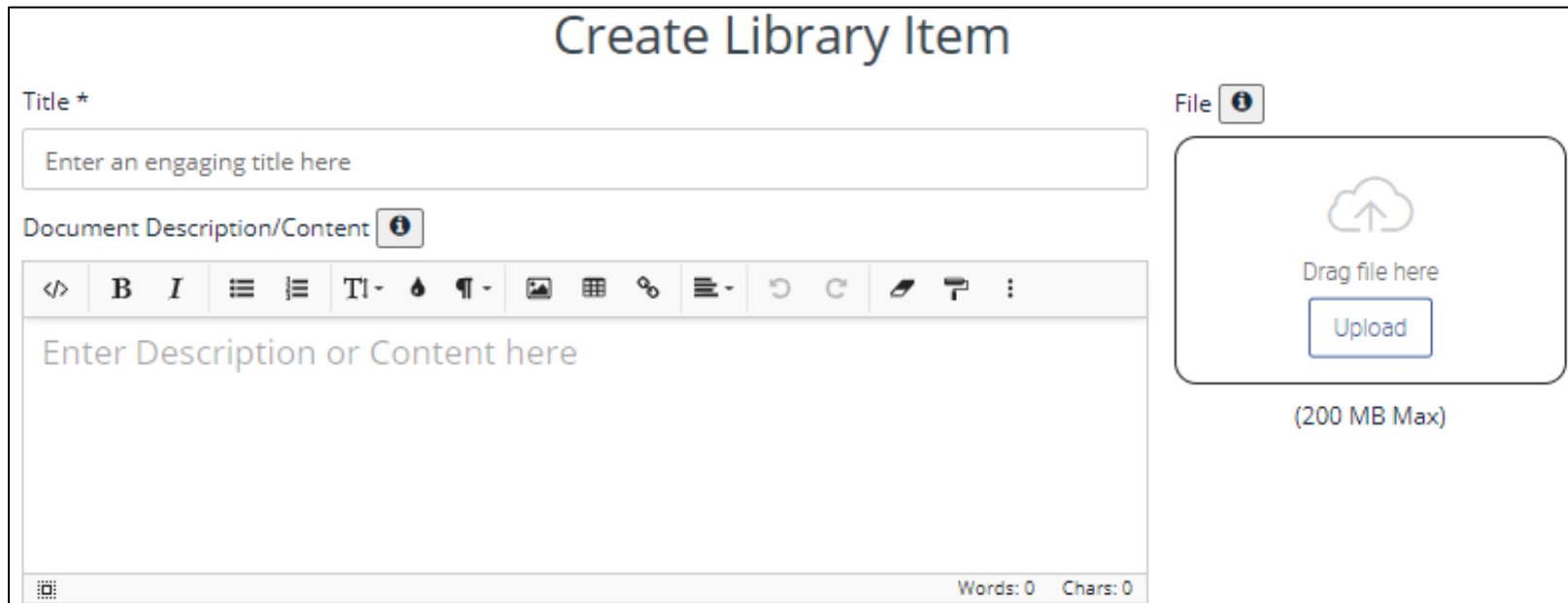
Library (Knowledge Base)

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.

A screenshot of the "Create Library Item" form. The form has a title "Create Library Item" at the top center. Below the title, there are two main input areas. The first is a text box labeled "Title *" with a placeholder "Enter an engaging title here". To the right of this text box is a "File" label with an information icon. The second input area is a rich text editor labeled "Document Description/Content" with an information icon. It features a toolbar with icons for bold, italic, bulleted list, numbered list, text color, background color, link, unlink, table, image, video, and other editing functions. The text area contains the placeholder "Enter Description or Content here". To the right of the rich text editor is a file upload area with a cloud icon, the text "Drag file here", an "Upload" button, and "(200 MB Max)" below it. At the bottom right of the form, there is a status bar showing "Words: 0" and "Chars: 0".

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.

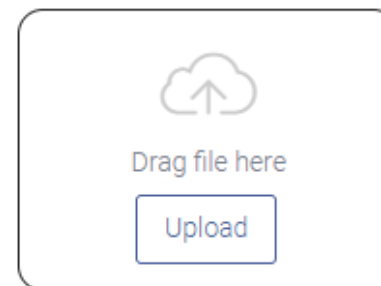
Notice: The maximum file size is 200 MB. Permitted library file formats include:

- 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.

File 




(200 MB Max)

File 



(200 MB Max)


 Training
Manual.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 separate 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.

Category *

Pick a category ▼

Associated Course ⓘ

None ▼

Associated Participant Group *

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.

Set Expiration date *


Notification Type


Email

SMS Text Messages

In-app Notification

None

Set Notification date 


Set Notification time 

Offline Availability

On

Off







Set Offline Expiration date *

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.

Library					
All Library Items					
Show	10	entries	Category	Search:	
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.



Do you want to disable this library item?

Type Disable in the box below.

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

Setup Progress

- General Course Information
- Notifications
- Preferences
- Certificate
- Course Reward Points
- Badge

Course Title*

Course Description

Category*

Course Benefit

Pre-Requisites

Achievements

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.

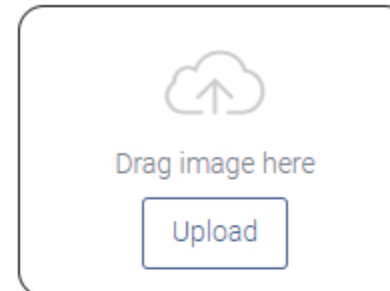
Course Card Image – this image will display as an icon on the course list. For best results, ensure that the uploaded image is 500 pixels x 500 pixels.

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.

Course Title Image

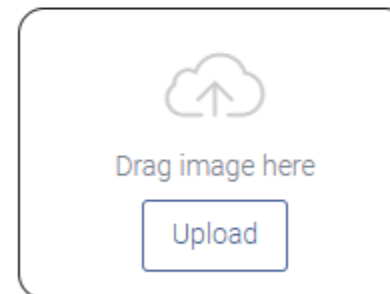


1242px * 2208px

Descriptive Alternative Text

Enter the course title image

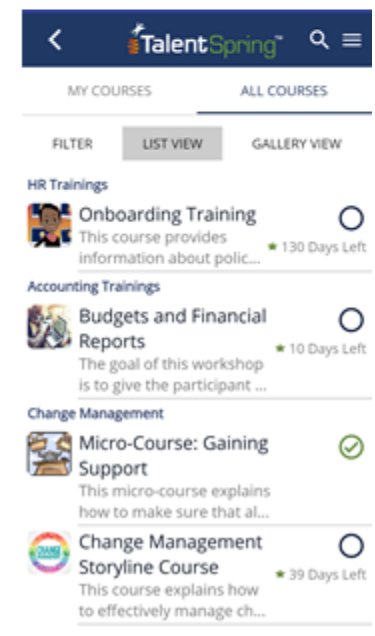
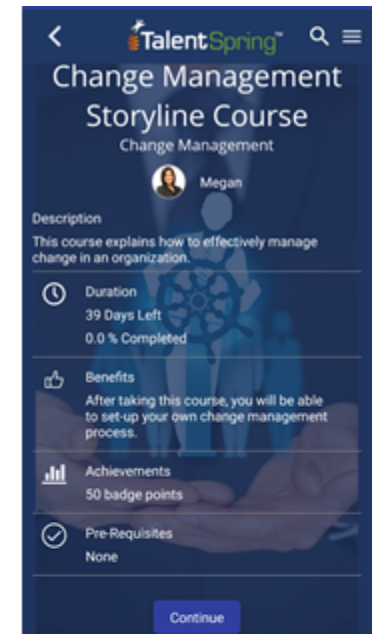
Course Card Image



500px * 500px

Descriptive Alternative Text

Enter the course card image



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.

Set Course Availability:

Start date* ⓘ to End date* ⓘ

Participant Group:

SELECT CREATE

Participant Group Name*

Participant Group Description

Select Participant Group*

Due date* ⓘ

Participant Group:

SELECT CREATE

Participant Group Name*

Participant Group Description

All Participants

Kody Fuller

Jamie Bird

Gabriel Charles

Group Participants*

Eddison Lyons



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.

Course Notifications

Setup Progress My Course

- General Course Information
- Notifications
- Preferences
- Certificate
- Course Reward Points
- Badge

Notification Type for Course Launch

- Email
- SMS Text Messages
- In-app Notification
- None

Notification Message

Set Notification date

Set Notification time ⓘ

Additional Notifications

Additional Notification Type

- Email
- SMS Text Messages
- In-app Notification
- None

Notification Message

Days before Due

Completion Status

Not Started

Not Started

Not Started and In Progress

All Participants

+ Add Notification

Back
Save & Continue

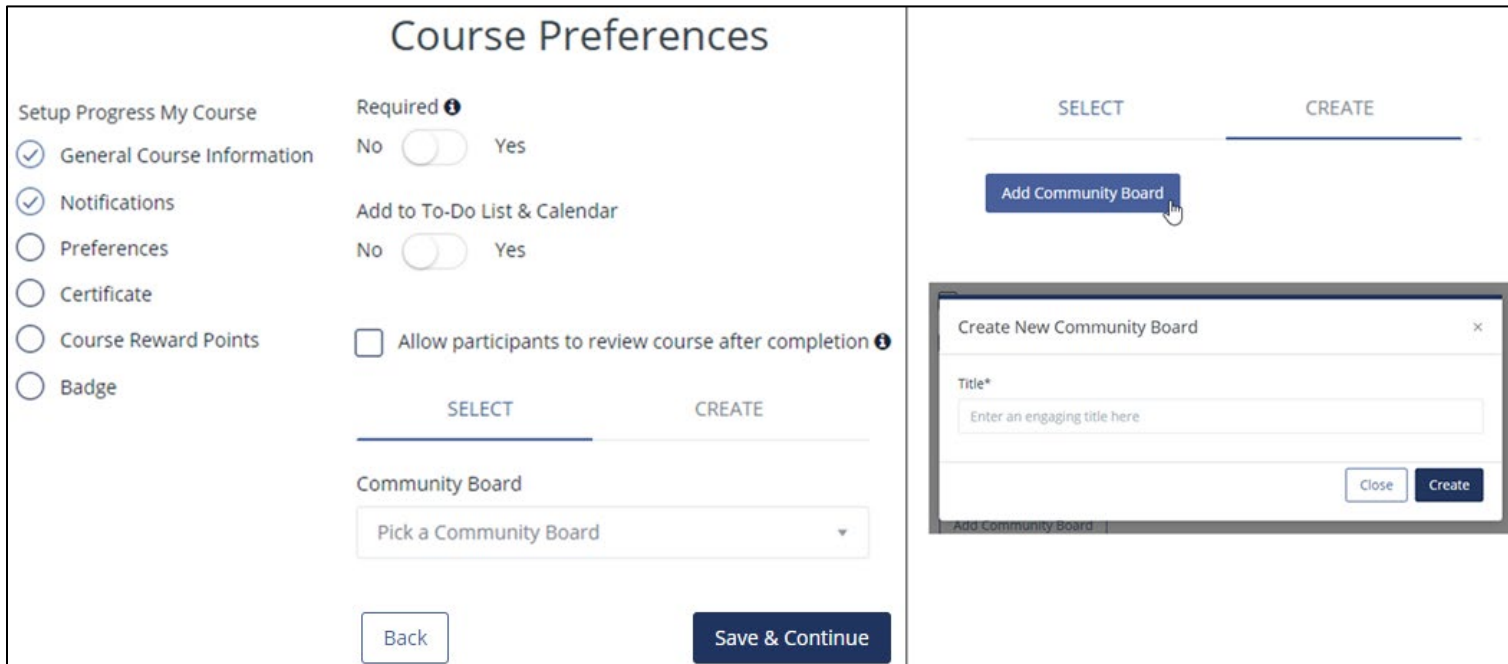
General Course Setup - Course Preferences & Community Boards

- **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**.



The screenshot displays the 'Course Preferences' interface. On the left, a sidebar lists 'Setup Progress My Course' options: General Course Information (checked), Notifications (checked), Preferences, Certificate, Course Reward Points, and Badge. The main area shows 'Required' (No/Yes toggle), 'Add to To-Do List & Calendar' (No/Yes toggle), and 'Allow participants to review course after completion' (checkbox). Below these are 'SELECT' and 'CREATE' tabs. The 'SELECT' tab is active, showing a 'Community Board' dropdown menu with the text 'Pick a Community Board'. At the bottom are 'Back' and 'Save & Continue' buttons. A modal window titled 'Create New Community Board' is open, featuring a 'Title*' input field with the placeholder 'Enter an engaging title here', and 'Close' and 'Create' buttons.

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 application will remain grayed out even when the course is complete.






Course Certificate

Setup Progress My Course

- General Course Information
- Notifications
- Preferences
- Certificate
- Course Reward Points
- Badge

CREATE FROM DEFAULT LOAD CERTIFICATE

Create the Course Certificate



Certificate Title

Certificate Message ?

Descriptive Alternative Text

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.

Course Certificate

CREATE FROM DEFAULT
LOAD CERTIFICATE

Load the Course Certificate

Load Image* ⓘ



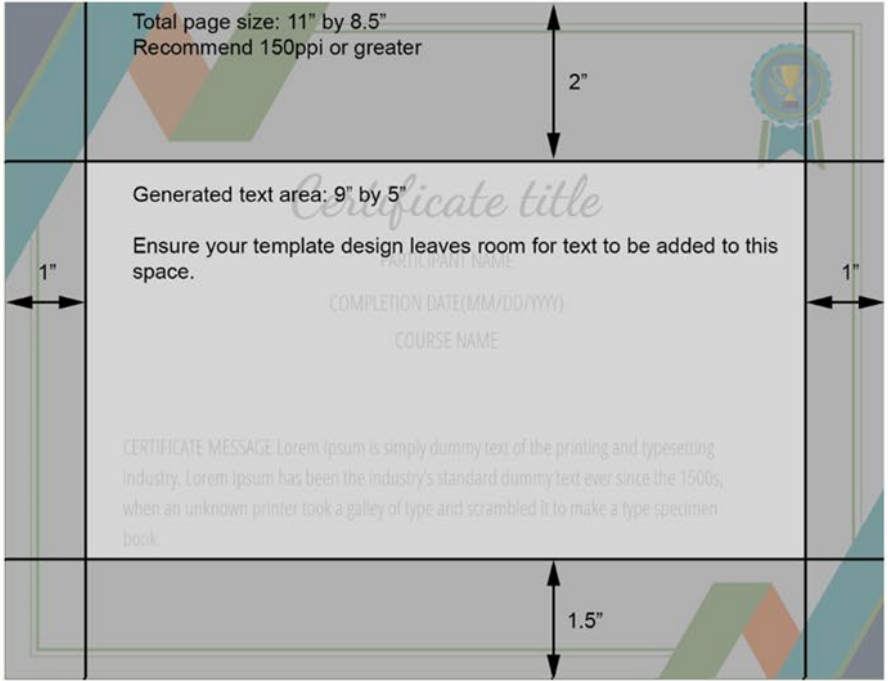
Drag image here

1650px * 1275px
(.png files only)

Certificate Image Guideline

Click here for image guidelines

Descriptive Alternative Text



Total page size: 11" by 8.5"
Recommend 150ppi or greater

Generated text area: 9" by 5"

Ensure your template design leaves room for text to be added to this space.

PARTICIPANT NAME
COMPLETION DATE(MM/DD/YYYY)
COURSE NAME

CERTIFICATE MESSAGE Lorem ipsum is simply dummy text of the printing and typesetting industry. Lorem ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.

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.

Course Reward Points

Setup Progress My Course

- General Course Information
- Notifications
- Preferences
- Certificate
- Course Reward Points
- Badge

Assign Reward Points ⓘ

How many reward points will the rewarded for the course?

Back Save & Continue

General Course Setup - Badges

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

Course Badge

Setup Progress My Course

- General Course Information
- Notifications
- Preferences
- Certificate
- Course Reward Points
- Badge

SELECT BADGE CREATE BADGE

Default Course Badge:

- Badge 1

Organization Course Badges:

- Gaining Support
- Change Management
- Onboarding

Back Save & Continue

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.


Course Badge

Setup Progress My Course

SELECT BADGE CREATE BADGE

- General Course Information
- Notifications
- Preferences
- Certificate
- Course Reward Points
- Badge

Badge Image *



Drag image here

Upload

500px * 500px

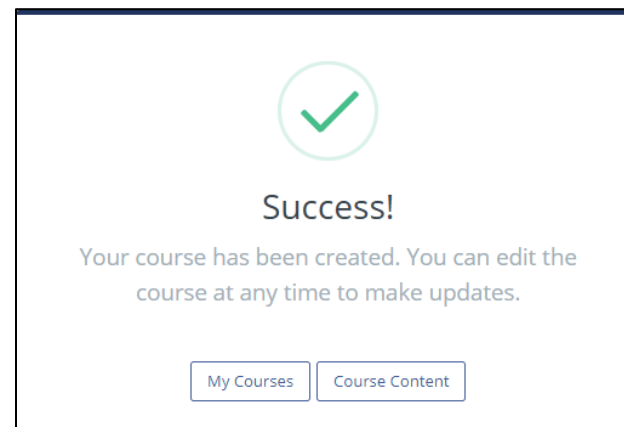
Badge Title*

Descriptive Alternative Text

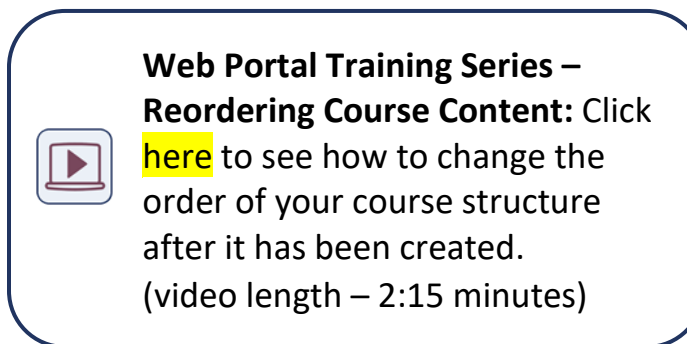
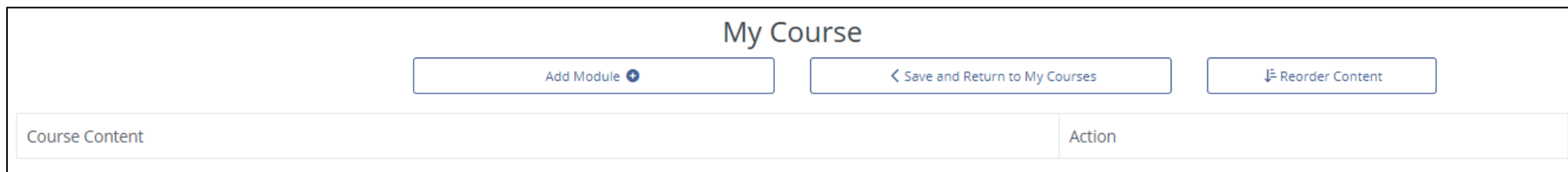
Back Submit

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.

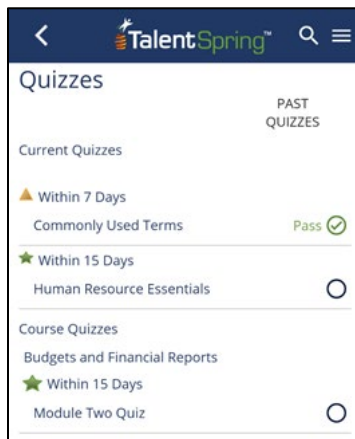


Course Content – Structure

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.

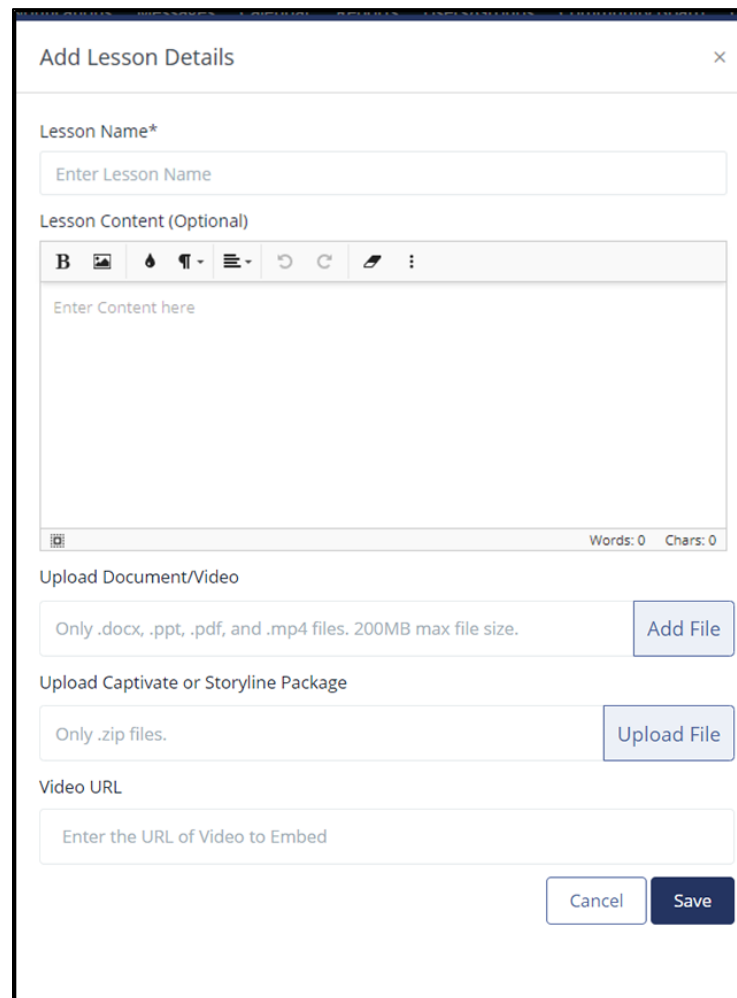
If you have existing training, you can:

- 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.

A screenshot of the "Add Lesson Details" form. The form has a title bar with a close button (X). It contains several sections: "Lesson Name*" with a text input field; "Lesson Content (Optional)" with a rich text editor toolbar (bold, image, link, list, undo, redo, italic) and a large text area; "Upload Document/Video" with a text input field, a description "Only .docx, .ppt, .pdf, and .mp4 files. 200MB max file size.", and an "Add File" button; "Upload Captivate or Storyline Package" with a text input field, a description "Only .zip files.", and an "Upload File" button; and "Video URL" with a text input field and a description "Enter the URL of Video to Embed". At the bottom right are "Cancel" and "Save" buttons.

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.

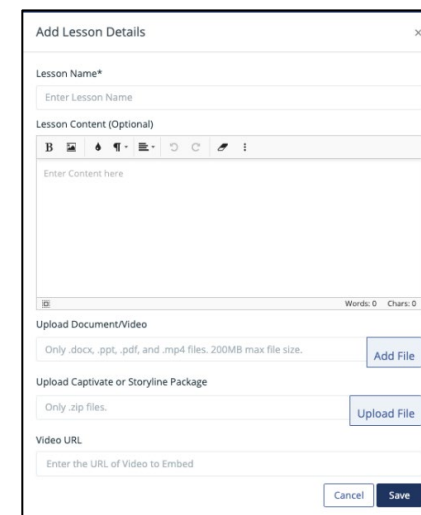
- **Video URL** – here you can add a link to a video or website that contains the content.



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.



The screenshot shows a web form titled "Add Lesson Details" with a close button (X) in the top right corner. The form contains the following fields and options:

- Lesson Name***: A text input field with the placeholder "Enter Lesson Name".
- Lesson Content (Optional)**: A rich text editor area with a toolbar containing icons for bold (B), italic (I), underline (U), link, unlink, list, and indent. Below the editor is a text area with the placeholder "Enter Content here" and a character count "Words: 0 Chars: 0".
- Upload Document/Video**: A section with a text input field containing the text "Only .docx, .ppt, .pdf, and .mp4 files. 200MB max file size." and an "Add File" button.
- Upload Captivate or Storyline Package**: A section with a text input field containing the text "Only .zip files." and an "Upload File" button.
- Video URL**: A section with a text input field containing the text "Enter the URL of Video to Embed".

At the bottom right of the form are "Cancel" and "Save" buttons.

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.

Assign Owner ×

Trainer or Admin*

TSTA1 Admin (Admin) ▼

Cancel
Assign

- **Message the owner** – select the speech icon, to message the owner. 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.

Do you want to disable this course?


Type Disable in the box below.






Disable

Cancel
OK

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.






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     

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.

Budgets and Financial Reports

[← Back](#)  [+ Add Participant Group](#)

Participant Groups	Percent Rate	Due Date	
Change Management	25%	09/02/2019	 
Logan's Group	33%	09/02/2019	

Showing 1 to 2 of 2 entries [Previous](#) [1](#) [Next](#)

Message ×

Participant*

× Maxine Trainer
× Emily Participant
× Megan Admin
× Logan Trainer
× Jennifer Participant
× Gayla Participant







Message*

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.

Budgets and Financial Reports > Change Management

[← Back](#) [Edit Participant Group](#)

Participants	Percent Complete	
Emily Participant	30%	 
Gayla Participant	0%	
Jennifer Participant	0%	
Logan Trainer	100%	
Maxine Trainer	0%	
Megan Admin	20%	

Showing 1 to 6 of 6 entries

[Previous](#) [1](#) [Next](#)

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								Search: <input type="text"/>	
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								Search: <input type="text"/>	
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.

Assign Editor ×

Admin(s) already has edit privileges

Trainer or Admin*

None of them

Cancel
Assign

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.

Leaderboard Skill Level Thresholds

Set Skill Level Requirement ⓘ

Beginner Level*	Intermediate Level*	Advanced Level*
<input type="text" value="0"/>	<input type="text" value="400"/>	<input type="text" value="8000"/>
Badge Title	Badge Title	Badge Title
<input type="text" value="Beginner"/>	<input type="text" value="Intermediate"/>	<input type="text" value="Advanced"/>
Badge Image	Badge Image	Badge Image
		
500px * 500px	500px * 500px	500px * 500px
Descriptive Alternative Text	Descriptive Alternative Text	Descriptive Alternative Text
<input type="text" value="Beginner"/>	<input type="text" value="Enter the Descriptive Alternative Text"/>	<input type="text" value="Enter the Descriptive Alternative Text"/>

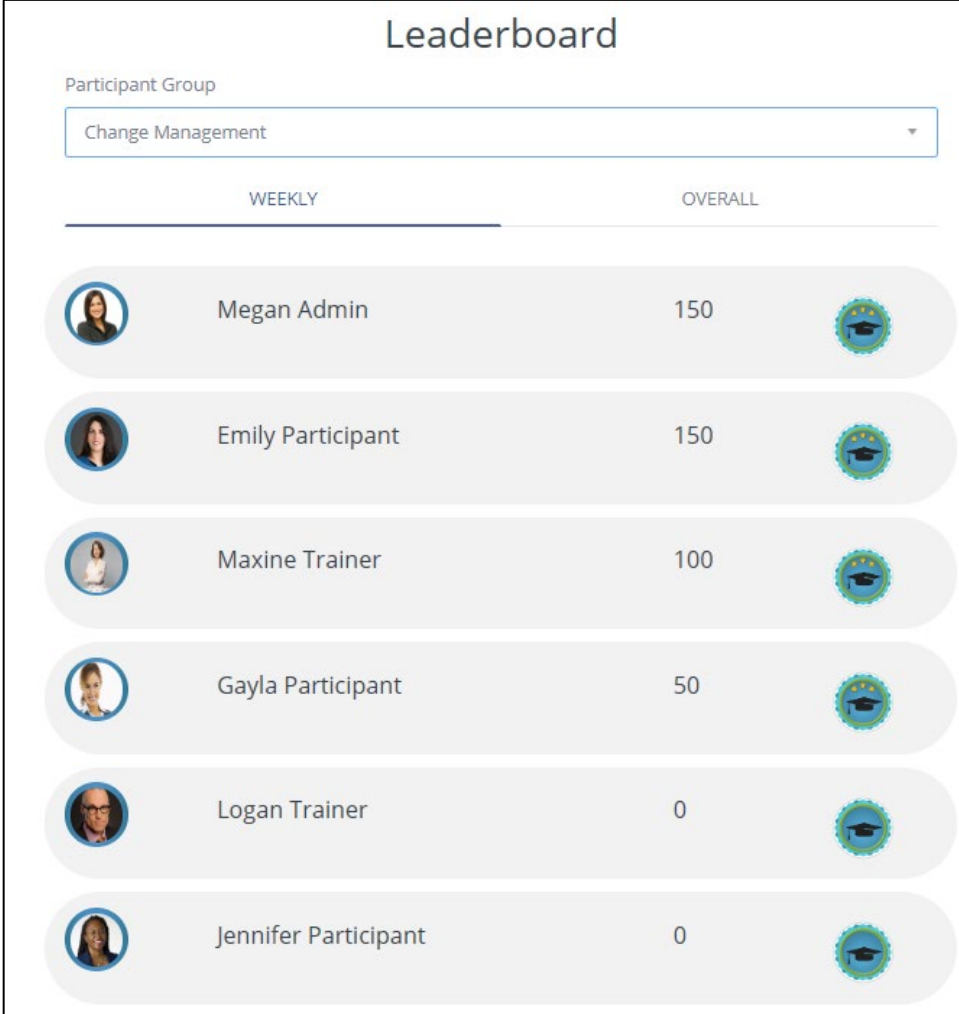














Warning: Avoid special characters as part of the file name. Upper and lowercase alphanumeric characters and underscores are accepted.

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.

A screenshot of the "Leaderboard" application interface. At the top, the title "Leaderboard" is centered. Below it is a "Participant Group" dropdown menu currently set to "Change Management". Two tabs, "WEEKLY" and "OVERALL", are visible, with "WEEKLY" being the active tab. The main content area displays a list of six participants, each with a circular profile picture, their name, their score, and a skill level icon (a graduation cap with stars).

	WEEKLY	OVERALL	
	Megan Admin	150	
	Emily Participant	150	
	Maxine Trainer	100	
	Gayla Participant	50	
	Logan Trainer	0	
	Jennifer Participant	0	

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 an Organizational Quiz

Quiz Properties

This area is for creating stand-alone organizational quizzes. To create a course quiz, go to the course section of the portal.

Quiz Title*

Number of times the quiz can be taken*


Passing Score (MAX 100)*

Failure Message

General Feedback

Select Participant Group

Start date* End 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.

Add to To-Do List & Calendar

No Yes

Shuffle Questions

Shuffle Responses

Allow audience to view quiz results

Allow audience to view question feedback

Use Latest Score Use Best Score

Quiz Questions

Question 1 +

Question 2 +

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.

Must pass quiz to pass the course

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.

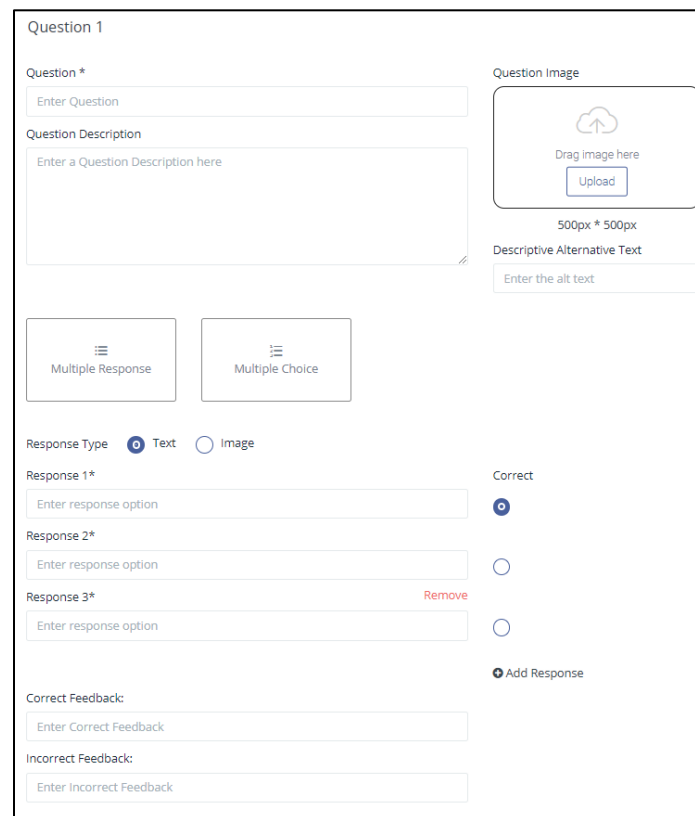


Warning: There are default radio buttons and pre-defined text on some pages of TalentSpring. If there are non-default radio buttons selected or non-default text appears, you will need to clear your browser cache. For more information on clearing your browser cache, please see the "Help" section of your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

A screenshot of the TalentSpring question creation interface. The form is titled "Question 1" and contains several sections: "Question *" with a text input field; "Question Description" with a larger text area; "Question Image" with a drag-and-drop area, an "Upload" button, and a "Descriptive Alternative Text" input field; "Response Type" with "Multiple Response" and "Multiple Choice" buttons; "Response Type" with radio buttons for "Text" (selected) and "Image"; "Response 1*" through "Response 3*" with text input fields and radio buttons for selection; "Correct Feedback" and "Incorrect Feedback" with text input fields; and an "Add Response" button.

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 an Organizational Poll


Poll Properties

This area is for creating stand-alone organizational polls. To create a course poll, go to the course section of the portal.


Poll Title*

Select Participant Group

Start date* **End date***

Poll Image



Drag image here

500px * 500px

Descriptive Alternative Text

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.

Add to To-Do List & Calendar

No Yes

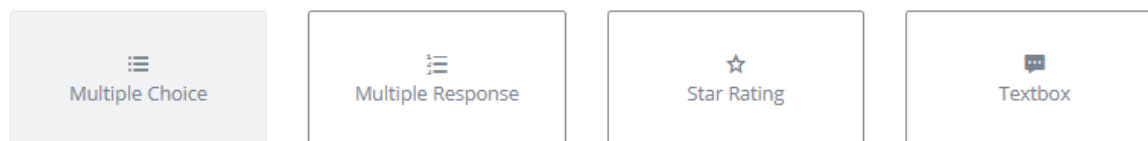
Question*

Question Description

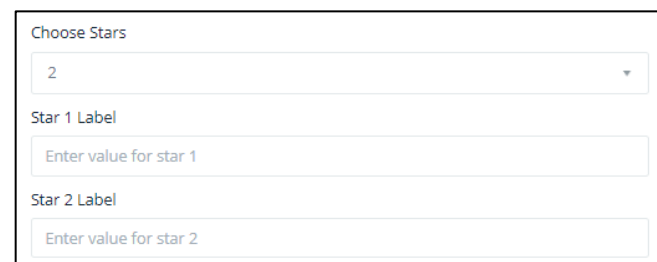
Allow audience to view poll results

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.

This screenshot shows the configuration interface for Multiple Choice and Multiple Response questions. It features three input fields labeled 'Option 1*', 'Option 2*', and 'Option 3', each containing the placeholder text 'Enter answer option'. A red 'Remove' link is positioned to the right of the 'Option 3' field. At the bottom right, there is a blue circular icon with a plus sign and the text 'Add Option'.This screenshot shows the configuration interface for Star Rating questions. It includes a dropdown menu labeled 'Choose Stars' with the number '2' selected. Below this are two input fields: 'Star 1 Label' with the placeholder 'Enter value for star 1' and 'Star 2 Label' with the placeholder 'Enter value for star 2'.This screenshot shows the configuration interface for Textbox questions. It features a dropdown menu labeled 'Textbox Character Limit*' with the number '20' selected.

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.

Create an Organizational Survey

Survey Properties

This area is for creating stand-alone organizational surveys. To create a course survey, go to the course section of the portal.

Survey Title*

Select Participant Group

Allow audience to view survey results

Allow audience to anonymously take the survey



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.

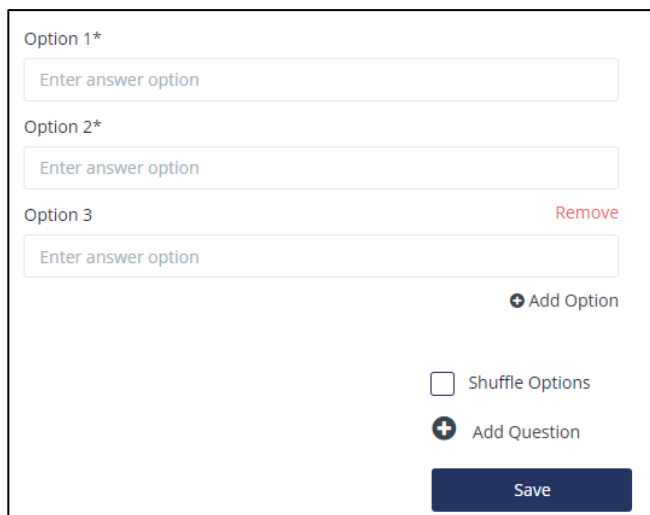
Start date *	End date*
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/> 
Add to To-Do List & Calendar	
No <input type="radio"/> Yes <input checked="" type="radio"/>	
Question *	Question Image
<input type="text" value="Enter the question you want to ask"/>	 Drag image here <input type="button" value="Upload"/>
Question Description	Descriptive Alternative Text
<input type="text" value="Enter any clarification description for the question you want to ask (optional)"/>	<input type="text" value="Enter the Alt Text"/>

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**.



Option 1*
Enter answer option

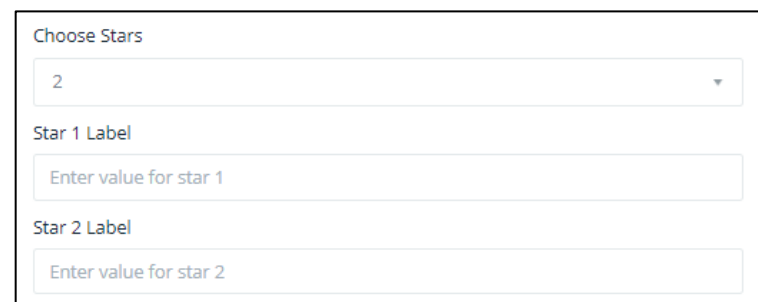
Option 2*
Enter answer option

Option 3 Remove
Enter answer option

+ Add Option

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.



Choose Stars
2

Star 1 Label
Enter value for star 1

Star 2 Label
Enter value for star 2

- 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.



Textbox Character Limit*
20

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

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.

Assign Owner ×

Trainer*

Select Trainer ▼

- **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.

Quiz View ×

Quiz Title : Commonly Used Terms

Quiz Participants

10 Search

Participant Name	Percent	Quiz Date
Emily Participant	100%	08/15/2019
Logan Trainer	100%	08/05/2019
Maxine Trainer	100%	08/06/2019
Megan Admin	0%	08/15/2019

Showing 1 to 4 of 4 entries Previous **1** Next

Quiz View ×

Quiz Title : Commonly Used Terms

Emily Participant

10 Search

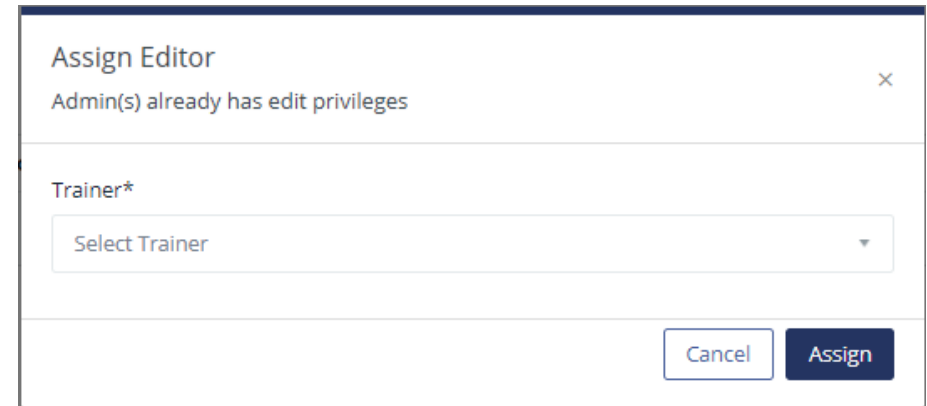
No	Question	Response	Result
1	Choose some of the commonly used terms in finance.	Assets Balance Sheet Capital	Correct

Showing 1 to 1 of 1 entries Previous **1** Next

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

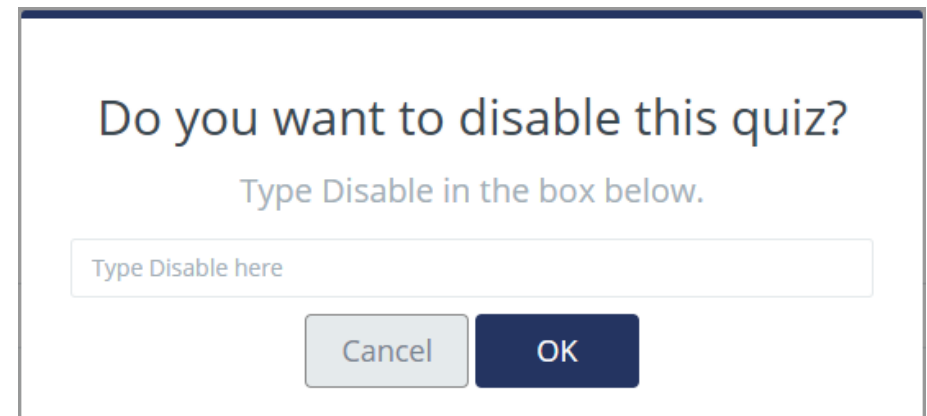


- **Assign Editor** – select another trainer who will have edit privileges to your quiz, but you will retain ownership. Assign Editor is a great option if you will be unavailable for a period of time.



- **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

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 **1**

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.

Past Organizational Quizzes

10

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 **1**

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.

Polls & Surveys

POLLS SURVEYS

Active Organizational Polls

10 + Add Poll Search

Poll	Owner	Responses	Start Date	End Date	
Change Management Models	Megan Admin	3	08/05/2019	09/30/2019	
Commonly Used Terms	Kate Admin	3	08/01/2019	09/30/2019	

Showing 1 to 3 of 3 entries Previous 1 Next

Active Course Polls

Budgets and Financial Reports

10 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

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.

Assign Owner ×

Trainer*

Select Trainer ▼

- **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.

Poll View ×

Poll Title : Change Management Models
Poll Question : What Change Management models, if any, are you familiar with?

Poll Participants

10 Search

Participant Name	Response	Poll Date
Emily Participant	Lewin's Change Management Model Kotter's 8 Step Change Model	08/06/2019
Logan Trainer	ADKAR Model Bridges Leading Transition Model	08/05/2019
Megan Admin	McKinsey 7-S Model ADKAR Model	08/05/2019

Showing 1 to 3 of 3 entries Previous **1** Next

Survey View ×

Survey Title : Evaluation
Gayla Participant

10 Search

Question	Type	Response	Date
Are there any other topics you'd like to add to this training?	Textbox	-	12/31/1969
Is there anything else you'd like to add?	Textbox	-	12/31/1969
Was the instructor knowledgeable about the topic?	Multiple Choice	-	12/31/1969
Was this training helpful to the job that you complete?	Multiple Choice	Yes	08/15/2019

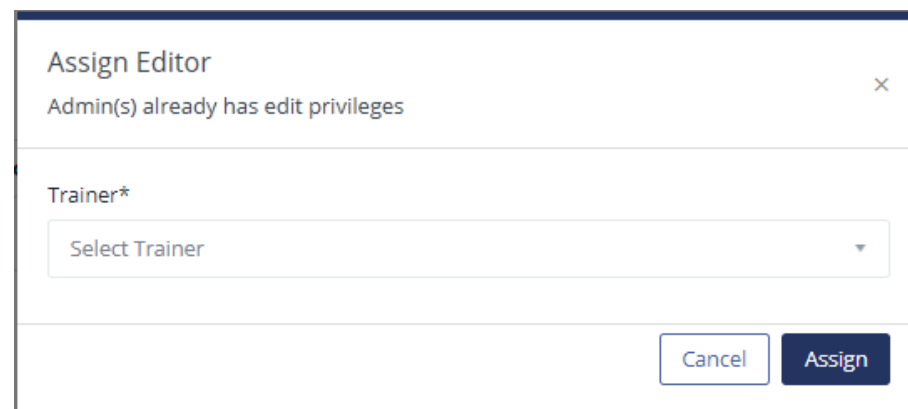
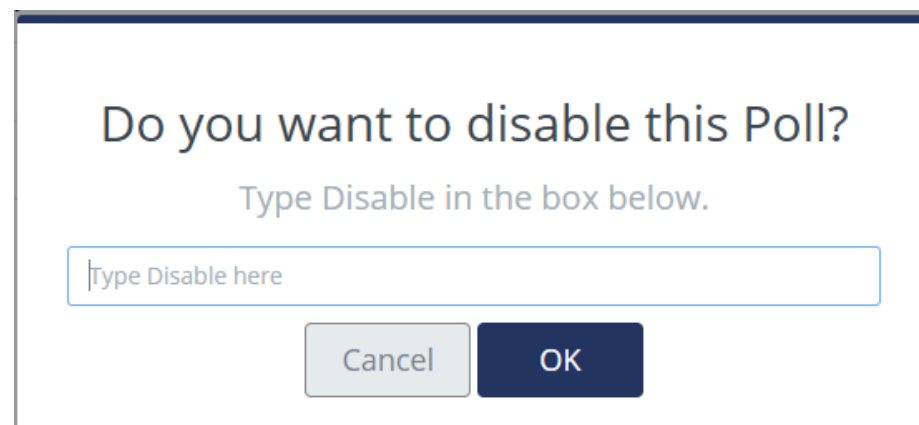
Showing 1 to 4 of 4 entries Previous **1** Next

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.

A dialog box titled "Assign Editor" with a close button (X) in the top right corner. Below the title, it says "Admin(s) already has edit privileges". There is a "Trainer*" label above a dropdown menu that currently shows "Select Trainer". At the bottom right, there are two buttons: "Cancel" and "Assign".A dialog box with the title "Do you want to disable this Poll?". Below the title, it says "Type Disable in the box below.". There is a text input field containing the placeholder text "Type Disable here". At the bottom, there are two buttons: "Cancel" and "OK".


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

10

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

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.

Notification

Create Notification

Participant Group*

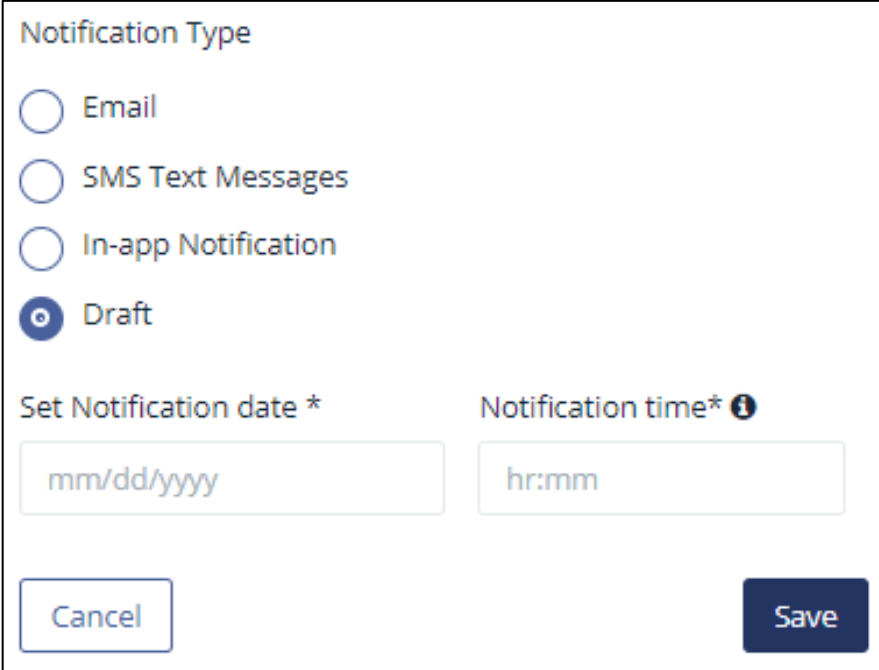
Notification*

Enter the notification text

Add to Participant Calendar and To-Do List

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.



The screenshot shows a form titled "Notification Type" with four radio button options: "Email", "SMS Text Messages", "In-app Notification", and "Draft". The "Draft" option is selected. Below the options are two input fields: "Set Notification date *" with a placeholder "mm/dd/yyyy" and "Notification time*" with a placeholder "hr:mm" and an information icon. At the bottom are "Cancel" and "Save" buttons.

- **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.

Notifications

Active Notifications

+ Add Notification

Notification	Delivery Date	Delivery Time	Participant Group	Notification Type	
Don't forget that Labor Day is coming up on Monday, September 2. Enjoy the holiday!	08/30/2019	08:30	Everyone	SMS Text Messages	

Showing 1 to 1 of 1 entries

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Past Notifications i

Notification	Delivery Date	Delivery Time	Participant Group	Notification Type	
Collection - Marketing Course Title - Placing a Product: Creating Value with Supply Chains available soon.	08/20/2019	15:15	Everyone	Email	

Showing 1 to 1 of 1 entries

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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.

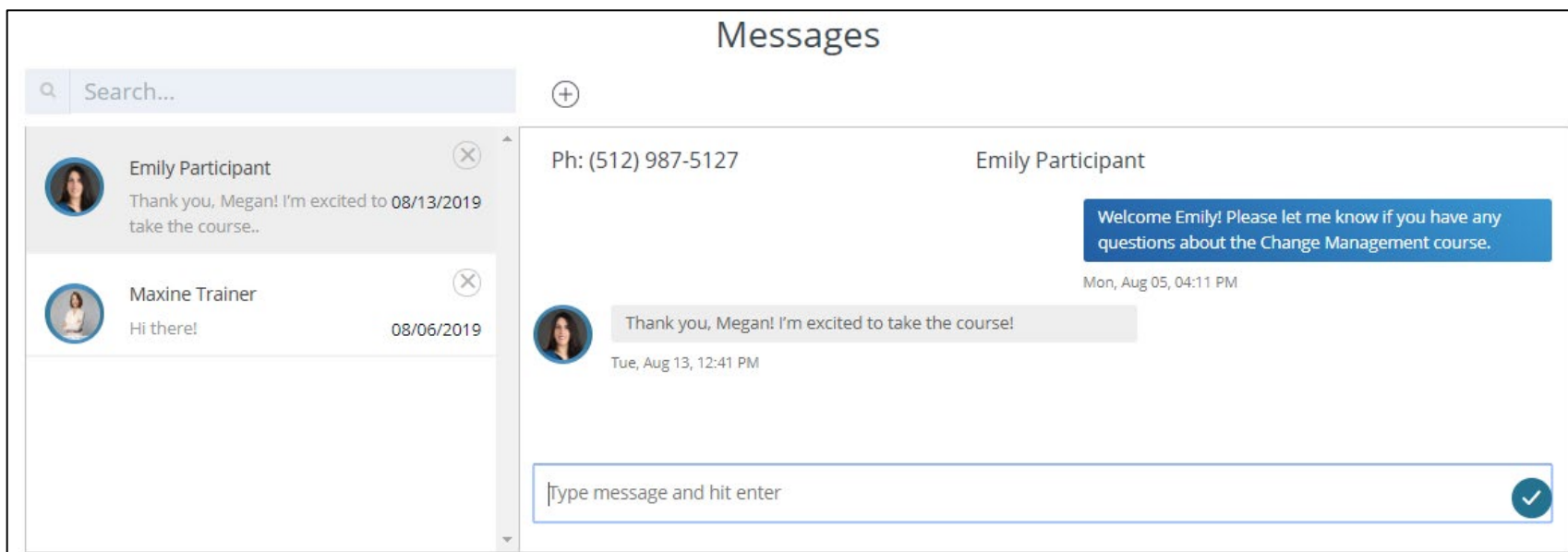
Do you want to disable this notification?

Type Disable in the below box.

Cancel
OK

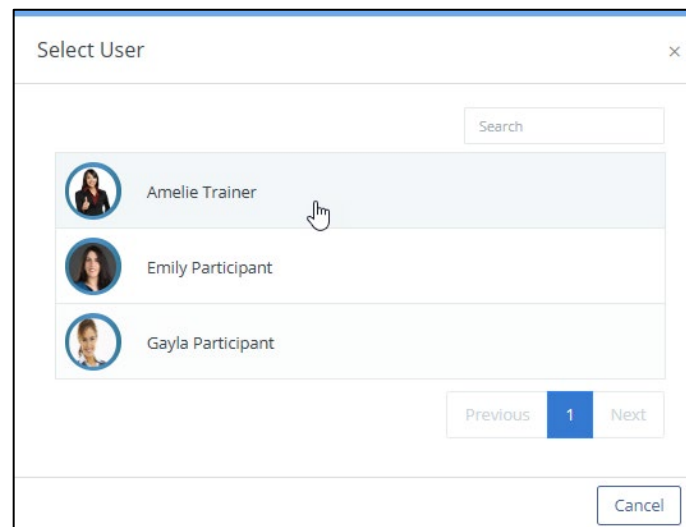
Messages

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.



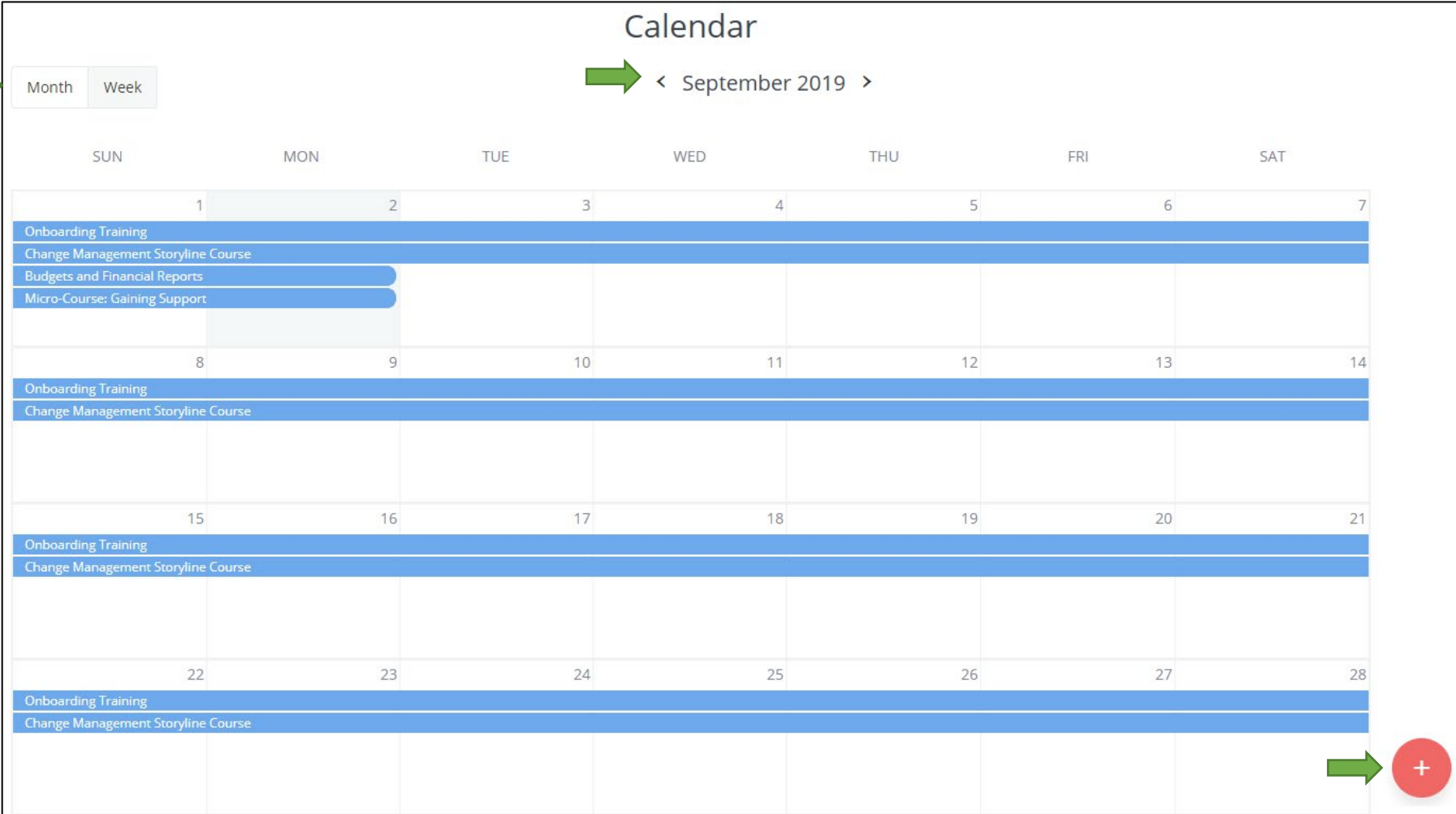
To start a new conversation, click the plus icon. A dialog box will display, allowing you to select any user in the organization. You can also type in keywords to Search users.

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

Month Week < September 2019 >

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
Onboarding Training						
Change Management Storyline Course						
Budgets and Financial Reports						
Micro-Course: Gaining Support						
8	9	10	11	12	13	14
Onboarding Training						
Change Management Storyline Course						
15	16	17	18	19	20	21
Onboarding Training						
Change Management Storyline Course						
22	23	24	25	26	27	28
Onboarding Training						
Change Management Storyline Course						

+

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.

✕

Add Event


Event Name*

Participant Group

Course

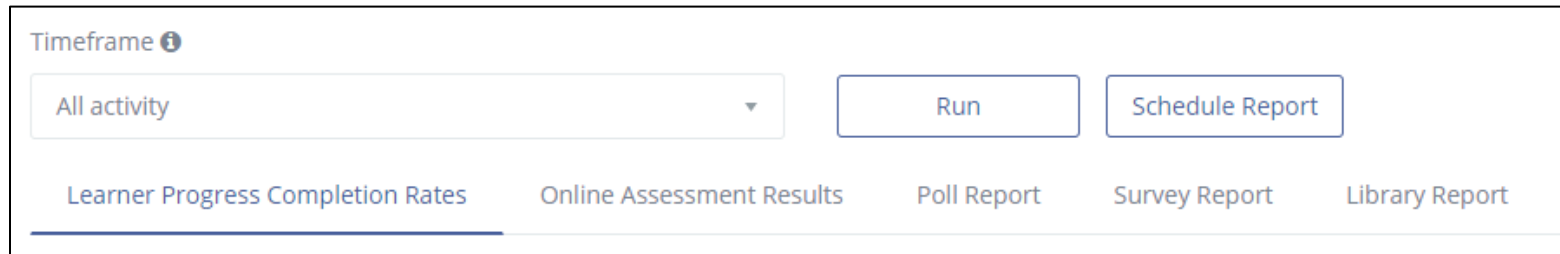
Description ⓘ

Start date * End date*

mm/dd/yyyy	mm/dd/yyyy	
------------	------------	--

Reports

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



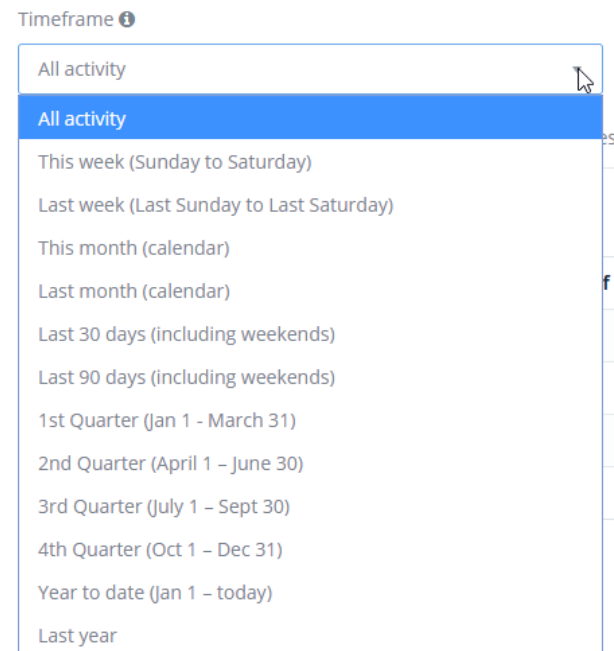
The screenshot shows a report generation interface. At the top left, there is a 'Timeframe' dropdown menu with an information icon, currently set to 'All activity'. To the right of the dropdown are two buttons: 'Run' and 'Schedule Report'. Below these elements is a horizontal navigation bar with five tabs: 'Learner Progress Completion Rates' (which is underlined and highlighted), 'Online Assessment Results', 'Poll Report', 'Survey Report', and 'Library Report'.

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.



Three buttons are displayed in a row: 'Export Excel', 'Export CSV', and 'Export PDF'.



The screenshot shows a 'Timeframe' dropdown menu with an information icon. The dropdown is open, displaying a list of options. The 'All activity' option is highlighted in blue. The other options are: 'This week (Sunday to Saturday)', 'Last week (Last Sunday to Last Saturday)', 'This month (calendar)', 'Last month (calendar)', 'Last 30 days (including weekends)', 'Last 90 days (including weekends)', '1st Quarter (Jan 1 - March 31)', '2nd Quarter (April 1 - June 30)', '3rd Quarter (July 1 - Sept 30)', '4th Quarter (Oct 1 - Dec 31)', 'Year to date (Jan 1 - today)', and 'Last year'.

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

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

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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

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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

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

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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**.

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

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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

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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

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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**.

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

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**.

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

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												
3												

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.

Upload User List

Upload user list:

File*

Drag an xls/csv/xlsx file here

(2 MB Max)

[Download example file](#)



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.

Create New User

First Name*

Last Name*

Email*

Phone

Role*

Job Title

Manager

Department

Region

SAVE



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.

Users

Enabled User List

10 ▾

Role ▾

⊕ Add New User

Search

Full Name	Email	Date Added	Role	
Amelie Trainer	ts_t3@mailinator.com	07/30/2019	Trainer	
Emily Participant	ts_p1@mailinator.com	07/30/2019	Participant	
Gayla Participant	ts_p2@mailinator.com	07/30/2019	Participant	
Jennifer Participant	ts_p4@mailinator.com	07/30/2019	Participant	

Showing 1 to 4 of 4 entries Previous **1** Next

Disabled User List

10 ▾

Search

Full Name	Email	Date Added	Role	
Victory Participant	ts_p3@mailinator.com	07/30/2019	Participant	

Showing 1 to 1 of 1 entries Previous **1** Next

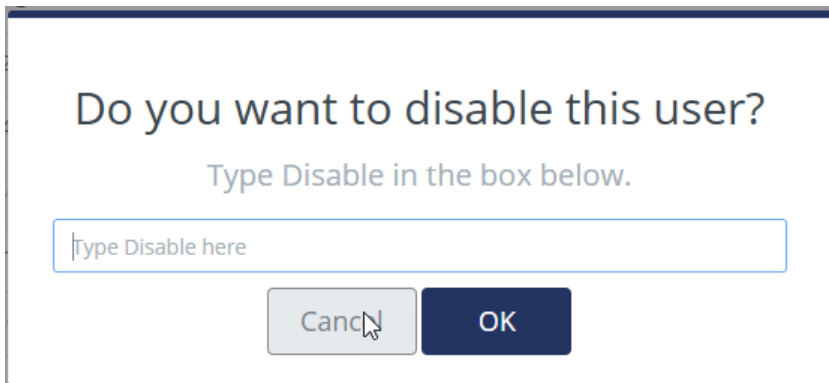
User List - Enabled & Disabled List

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.



Do you want to disable this user?

Type Disable in the box below.

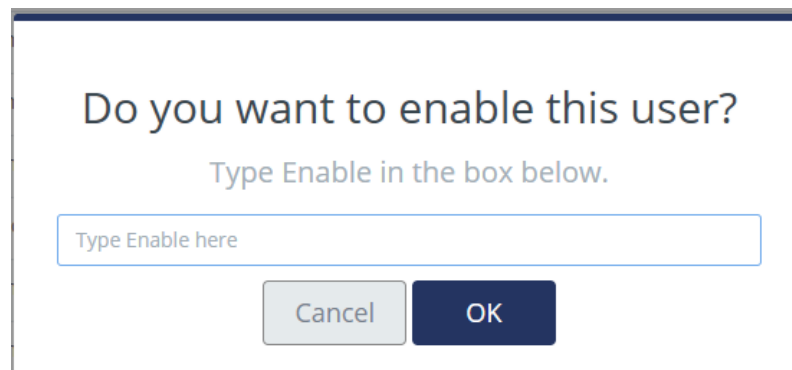
Cancel OK

- **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.

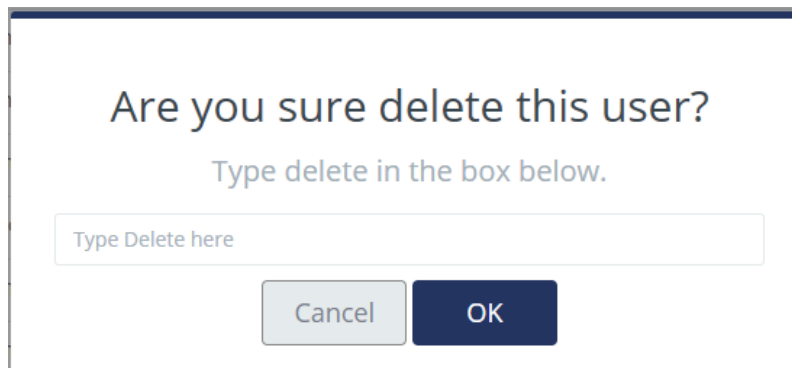


Do you want to enable this user?

Type Enable in the box below.

Cancel OK

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



Are you sure delete this user?

Type delete in the box below.

Cancel OK

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.

Add Participant Group

Participant Group

Participant Group Name*

Participant Group Description

All Participants	Group Participants*
<ul style="list-style-type: none">Emily ParticipantGayla ParticipantJennifer ParticipantJoshua TrainerKate AdminLogan TrainerMaxine Trainer	<ul style="list-style-type: none">Amelie Trainer



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](#)



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 ▾

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

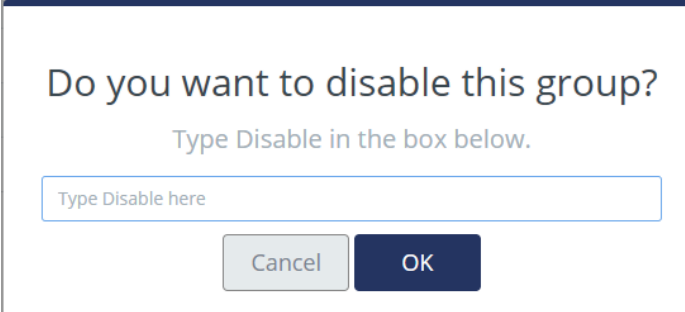
Participant Groups – View, Edit, & Disable

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.

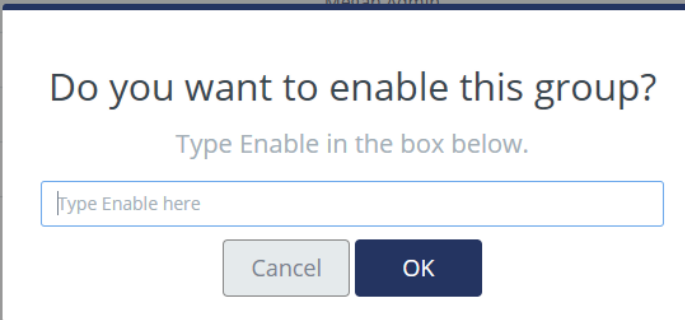
The disable icon will change to the enable icon (open lock) and appear in the Disabled Users table. **Note:** Data for this user will not show up in reports while disabled.

A dialog box with a white background and a dark border. The title is "Do you want to disable this group?". Below the title is the instruction "Type Disable in the box below." followed by a text input field containing the placeholder text "Type Disable here". At the bottom are two buttons: "Cancel" (light gray) and "OK" (dark blue).

For Disabled participant groups, you have the option to:








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

A dialog box with a white background and a dark border. The title is "Do you want to enable this group?". Below the title is the instruction "Type Enable in the box below." followed by a text input field containing the placeholder text "Type Enable here". At the bottom are two buttons: "Cancel" (light gray) and "OK" (dark blue).

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**.

Community Boards						
Boards	Threads	Replies	Owner	Latest Post		
Budgets and Financial Reports	4	1	Logan Trainer	 Emily Participant 08/13/2019		
Change Management	0	0	Megan Admin			
Onboarding Training	1	1	Maxine Trainer	 Emily Participant 08/28/2019		

Showing 1 to 3 of 3 entries

Previous 1 Next

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.

Do you want to disable this board?

Type Disable in the box below.

Community Board – Management of Threads and Posts

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




Boards	Threads	Replies	Owner	Latest Post
Budgets and Financial Reports	4	1	Logan Trainer	 Emily Participant 08/13/2019 

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.

[← Back](#)

Onboarding Training

10 ▾ ➔ Add New Thread

Threads	Replies	Latest Post
I love this training!	1	 Emily Participant. 08/28/2019 ➔  




Showing 1 to 1 of 1 entries Previous **1** Next

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.

[← Back](#)

I love this training!

10 ▾ ➔ Add New Reply

Response	User
The animations are fun.	 Emily Participant. 08/28/2019  

Showing 1 to 1 of 1 entries Previous **1** Next

Organization

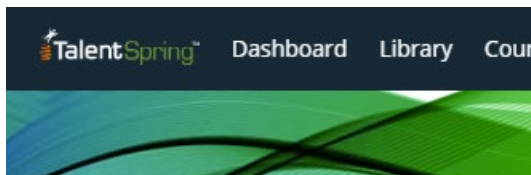
Organizational Setup

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 feature will 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.

Organization Profile

Organization Name *	Organization Logo 1
<input type="text" value="TS Company"/>	
Organization Address *	Descriptive Alternative Text
<input type="text" value="8825 Stanford Blvd. Columbia, MD 21045"/>	<input type="text" value="Enter the alt text"/>
Organization Phone *	Organization Logo 2
<input type="text" value="555-555-1213"/>	
Organization Email *	Descriptive Alternative Text
<input type="text" value="TS_ORG1@mailinator.com"/>	<input type="text" value="Enter the alt text"/>

Add Point of Contact

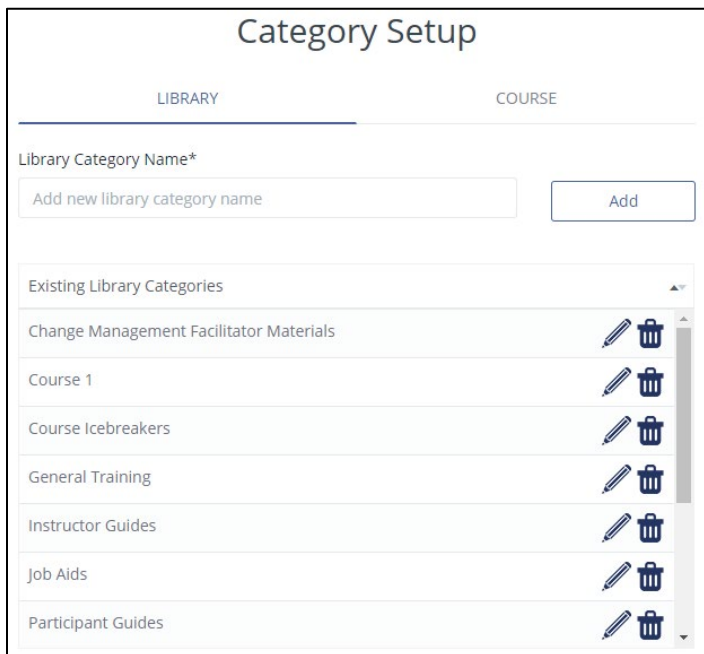
Authorized First Point of Contact Name*	
<input type="text" value="Megan"/>	
Authorized First Point of Contact Phone*	
<input type="text" value="555-555-1213"/>	
Authorized First Point of Contact Email*	
<input type="text" value="TS_ORG1@mailinator.com"/>	

Allow Gamification On Off

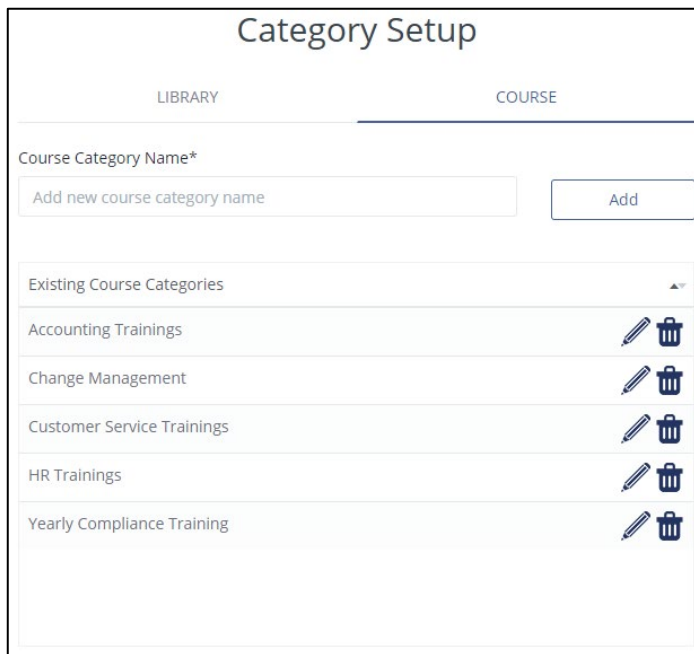
Select Organization Time Zone EST

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.



The screenshot shows the 'Category Setup' interface for Library categories. At the top, there are two tabs: 'LIBRARY' (selected) and 'COURSE'. Below the tabs, there is a section for 'Library Category Name*' with a text input field containing 'Add new library category name' and an 'Add' button. Below this is a section for 'Existing Library Categories' with a scrollable list of categories. Each category has an edit icon (pencil) and a delete icon (trash can). The categories listed are: Change Management Facilitator Materials, Course 1, Course Icebreakers, General Training, Instructor Guides, Job Aids, and Participant Guides.



The screenshot shows the 'Category Setup' interface for Course categories. At the top, there are two tabs: 'LIBRARY' and 'COURSE' (selected). Below the tabs, there is a section for 'Course Category Name*' with a text input field containing 'Add new course category name' and an 'Add' button. Below this is a section for 'Existing Course Categories' with a scrollable list of categories. Each category has an edit icon (pencil) and a delete icon (trash can). The categories listed are: Accounting Trainings, Change Management, Customer Service Trainings, HR Trainings, and Yearly Compliance Training.



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.

Create Something New



Library



Course



Quiz



Poll/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.

Create Course Badge

Badge Title*

Badge Image*



Drag image here

500px * 500px

Descriptive Alternative Text













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.


Course Badge List

10 ▾

 (+) Add New Badge

Badge Name	Creator	Creation Date	Role	Badge Image	
CM badge	Megan Admin	08/05/2019	Admin		 
Course Badge	Logan Trainer	08/02/2019	Trainer		 
Gaining Support	Megan Admin	08/05/2019	Admin		 
Onboarding	Maxine Trainer	08/05/2019	Trainer		 

Showing 1 to 4 of 4 entries










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

Alert

Are you sure you want to delete this badge?

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 Achievements							
10	Search						
Achievements	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.

Edit Achievement

Achievement*
Bookworm







Achievement Category
Utilization

Achievement Description
Access menu item

Level 1*
50

Level 2*
100

Level 3*
150

Level 1*	Level 2*	Level 3*
<p>Badge Image</p>  <p>500px * 500px</p> <p>Badge Image Gray</p>  <p>500px * 500px</p> <p>Descriptive Alternative Text</p> <p>Enter the badge image alt text here</p>	<p>Badge Image</p>  <p>500px * 500px</p> <p>Badge Image Gray</p>  <p>500px * 500px</p> <p>Descriptive Alternative Text</p> <p>Enter the badge image alt text here</p>	<p>Badge Image</p>  <p>500px * 500px</p> <p>Badge Image Gray</p>  <p>500px * 500px</p> <p>Descriptive Alternative Text</p> <p>Enter the badge image alt text here</p>

Cancel Save

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.

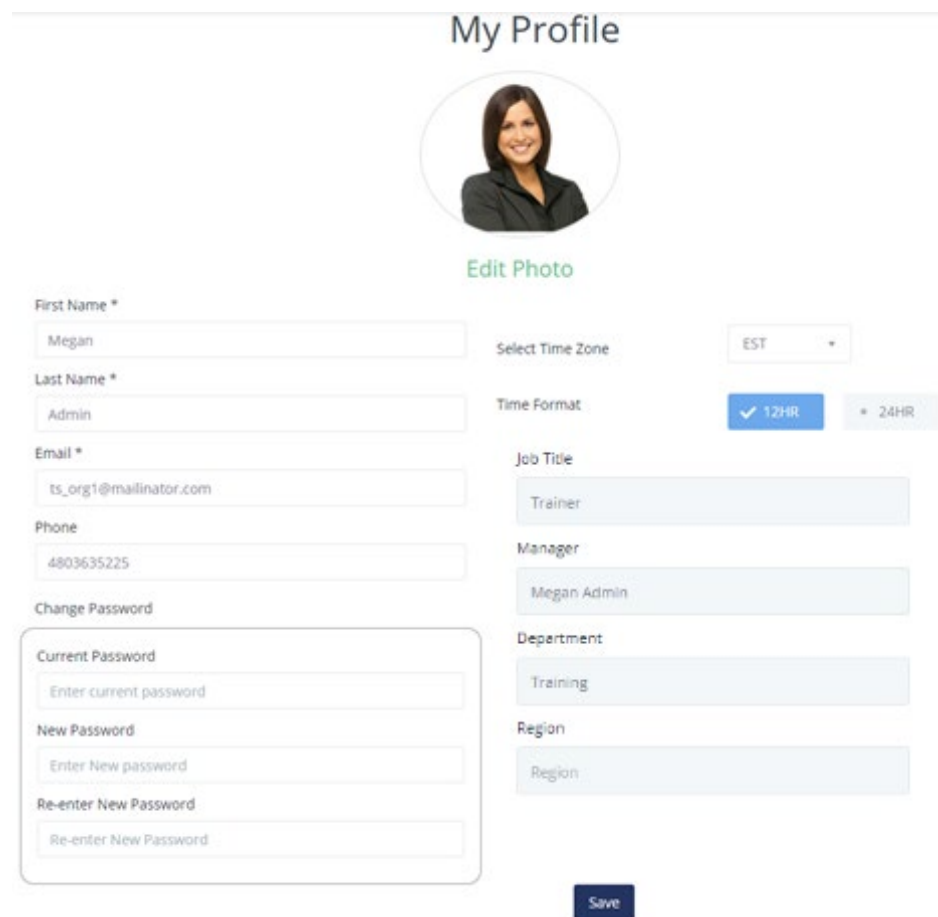
For best results, ensure that the uploaded image is 500 pixels x 500 pixels. You can add descriptive alternative text to images for users reading with assistive technology.

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.

A screenshot of a web form titled "My Profile". At the top right is a circular profile picture of a woman with the text "Edit Photo" below it. The form is divided into two columns. The left column contains text input fields for "First Name *" (Megan), "Last Name *" (Admin), "Email *" (ts_org1@mailinator.com), and "Phone" (4803635225). Below these is a "Change Password" section with three input fields: "Current Password" (placeholder: Enter current password), "New Password" (placeholder: Enter New password), and "Re-enter New Password" (placeholder: Re-enter New Password). The right column contains a "Select Time Zone" dropdown menu (EST), a "Time Format" section with two buttons (12HR and 24HR, with 12HR selected), and four read-only text boxes for "Job Title" (Trainer), "Manager" (Megan Admin), "Department" (Training), and "Region" (Region). A blue "Save" button is located at the bottom right of the form.