

What would you like me to do?

Pull top-priority HCPs from CRM

Share key updates and insights related for drug [x|v]

Show scheduled meetings for this week.

New request +

ACTO

ACTO Platform Admin Guide



Admin Guide

This document provides platform administrators a step-by-step guide on the ACTO platform's capabilities. **Administrator** refers to individuals who can access and manage the platform's back-end, and have administrative access and permissions. End users do not fall into this category.

This document is organized into sections, each exploring a core capability and its features. The Table of Contents below links to each section.

Click into any of the links below to get started!

Table of Contents

1. [Admin Guide to Platform Essentials](#)
2. [Admin Guide to Content Management](#)
3. [Admin Guide to Learn](#)
4. [Admin Guide to Resources](#)
5. [Admin Guide to Coaching Scenarios](#)
6. [Manager Guide to Coaching Scenarios](#)
7. [Admin Guide to Field Coaching](#)
8. [Manager Guide to Field Coaching](#)
9. [Admin Guide to Coaching Certifications](#)
10. [Manager Guide to Coaching Certifications](#)
11. [Admin Guide to Journeys](#)
12. [Admin Guide to Events](#)
13. [Admin Guide to the Launchpad](#)
14. [Admin Guide to Analytics](#)
15. [Admin Guide to the Report Generator](#)
16. [Admin Guide to Embedded Reports](#)
17. [Default Role Permissions Table](#)
18. [Supported Files and Formats](#)



Admin Guide to Platform Essentials



Admin Guide to Platform Essentials

This guide walks through essential platform processes like how to navigate the platform, set up and configure a company domain, populate clinical data and product tags, and set up the User Management system.

Click into any of the links below to get started.

Table of Contents

1. [Learning Objectives](#)
2. [How to Navigate the ACTO Homepage](#)
3. [Getting Started on ACTO](#)
4. [How to Switch Between Administrative and User Mode](#)
5. [Configure Domain Settings](#)
6. [Configure Domain – Domain Setup](#)
7. [Configure Domain – Taxonomy Settings](#)
8. [Configure Domain – Core Tool Settings](#)
9. [Configure Domain – Notification Settings](#)
10. [Setup – User Management Overview](#)
11. [User Management – How to Add Teams and Territories](#)
12. [User Management – How to Add and Update Users](#)
13. [User Management – How to Add New Users](#)
14. [User Management – How to Add, Edit, and Update Roles](#)
15. [User Management – Default Platform Roles Description](#)
16. [Tagging – How to Set up Clinical and Product Tags](#)
17. [Tagging – How to Add Therapeutic Area Tags](#)
18. [Tagging – How to Add Disease State Tags](#)
19. [Tagging – How to Add Product Line Tags](#)
20. [Tagging – How to Add Product Tags](#)
21. [Object Management](#)
22. [How to Create Competencies](#)
23. [How to Update Personal Profile Settings](#)



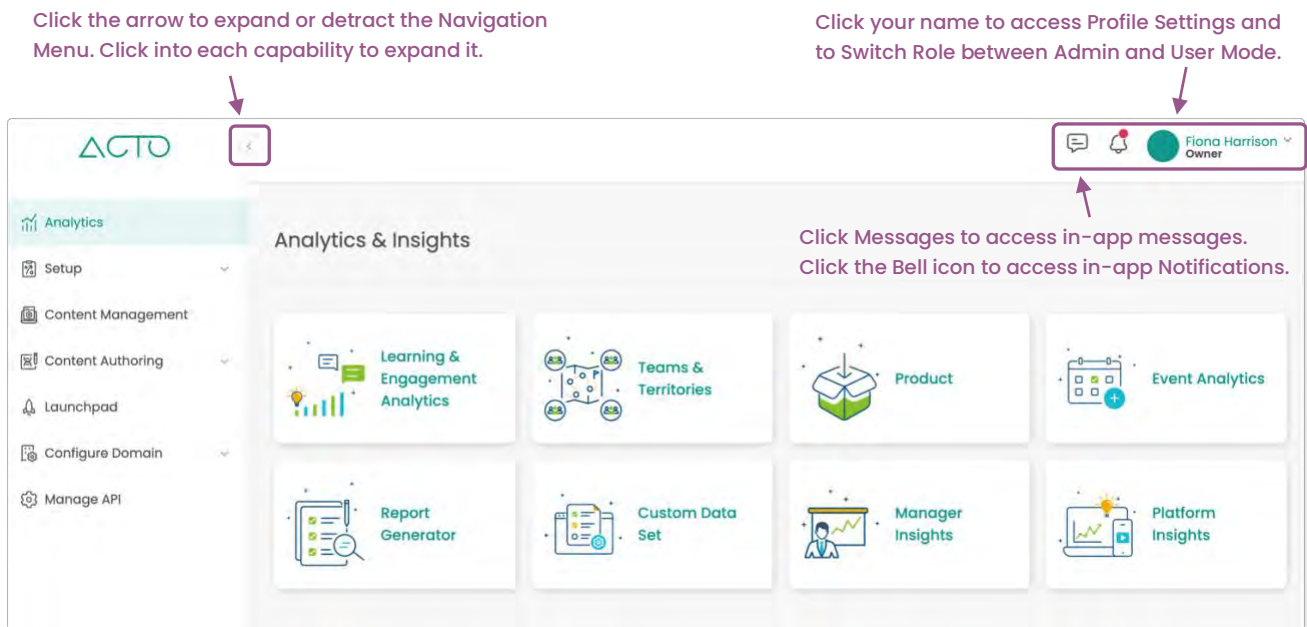
Admin Guide to Platform Essentials

Learning Objectives

- How to navigate the platform
- How to set up and configure domain wide settings
- How to add users, teams, territories, and roles under the User Management System
- How to add clinical and products object tags

How to Navigate the ACTO Homepage

When you log in to ACTO in administrative mode, you will first land on the Analytics homepage. Navigate through the platform using the **Navigation menu** on the left of the screen. This menu is accessible in every section of the platform.

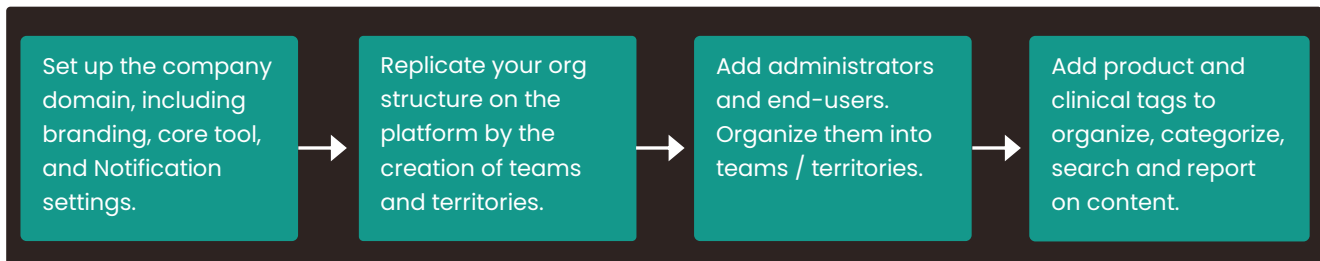


NOTE The different administrative roles may have a different view of and access to the platform's tools depending on the permissions set for them.

1. Log in to ACTO on your computer browser. Please use Google Chrome or Mozilla Firefox.
2. Make sure you are in administrative mode. End-users cannot access admin functionality.
3. Expand the **Navigation menu** on the left of your screen and select an option.

Getting Started on ACTO

On the platform's back-end, each domain has one Owner, and multiple administrative roles. These users have various permissions to set up and organize each company's unique portal on ACTO. To learn about the default permissions for each role, please reference the [ACTO Default Role and Permissions Table](#).



How to Switch between Administrative and User Mode

Every administrator – someone who can access the platform's back-end administrative functionality – can access the platform in administrative and user mode. To switch between administrative and user mode on a web browser, click your name on the top right of any page and select **Switch Role**. If you access the platform on your mobile device, you will automatically be in user mode. Here's why:

Switching between administrative and user mode allows platform administrators to understand the user experience as well as run test deployments before pushing out training, coaching, or resources to end-users.

Employees who administer the platform may also have company-wide, team, or role specific training, coaching, or resources pushed out to them. They would access and complete these initiatives as end-users.

While most administrative functionality is only accessible in administrative mode on a web browser, Coach and Events are exceptions. Some coaching and event features require Managers to switch over to user mode on web, or use a mobile device or tablet, when pushing coaching to their teams or deploying events to

Configure Domain Settings

Configuring domain settings allows administrators to set up platform-wide settings and preferred branding and nomenclature. Click **Configure Domain** from the Navigation menu, and select one of the following options:

- **[Domain Setup](#)** – In this section you may customize the domain name; set up company branding including logos, background images, colors, and fonts; upload company policies and terms; set up the domain time zone; and enable or disable peer-to-peer messaging across the platform.
- **[Taxonomy Settings](#)** – In this section you may customize certain platform nomenclature/labels.
- **[Core Tool Settings](#)** – In this section you may enable or disable an end-user's ability to upload resources from their mobile device into the Coaching Scenarios, as well as set mandatory Field Coaching settings.
- **[Notification Settings](#)** – In this section you may enable or disable capability specific email and push notifications that are sent out to end-users on the platform.

Configure Domain – Domain Setup

The section below provides instructions on navigating domain setup.

1. Click **Configure Domain** from the **Navigation** menu. Select **Domain Setup**.
 1. Proceed through the Domain Setup wizard. Enter or edit information in the **Domain Setup**, **Branding**, and **Settings** sections.
 2. Please click **Save** after each section to save your information. Click **Next Step** to move forward.
 3. Review the information entered. Click **Finish Setup** to complete.
- **Domain Setup** – Enter your domain name and preferred app name. Set up the domain owner's information.
 - **Branding** – Upload a domain logo and icon. Domain logos appears on the homepage and domain icons above the Navigation menu. You may customize the homepage background, and select preferred domain colors and fonts.
 - **Settings** – Add company policies and terms. Select default time zone and language settings.
 - Click **Peer-to-Peer Messaging** to allow users to privately chat on ACTO's Messaging tool. *If this is unchecked, users will not be able to interact on a peer-to-peer level, but only respond to administrators who message them*

Under **Branding** in **Domain Setup**, you may customize the homepage background for the devices learners will use. Click the question mark icon next to each background tile to find the ideal image ratio for your upload.

Homepage Background

Website ? iPad/Tablet ? Mobile ?

Drag & Drop, or upload a file

Drag & Drop, or upload a file

Drag & Drop, or upload a file

Preview Preview Preview

Save

Configure Domain – Taxonomy Settings

Taxonomy Settings allow you to customize nomenclature for certain labels on the platform. To access this setting, click **Configure Domain** from the Side Navigation and select **Taxonomy Settings**. Click the pencil icon next to an ACTO label to create a custom label. The following may be customized: **Behavior**, **Competency**, **Disease State**, **Therapeutic Area**, **Field Coaching**, **Field Coaching Report**, and **Pre-Work (Events)**.

Any added custom labels will reflect in the Tagging and Filter features across the platform.

Configure Domain – Core Tool Settings

Core Tool Settings allows admins to enable/disable a user's ability to upload content into Coaching Scenarios, and update Field Coaching settings. To access Core Tool Settings, select **Configure Domain** from the Navigation menu and select **Core Tool Settings**.

Configure Domain – Notification Settings

Notification Settings allow you to enable or disable specific email or push notifications on the platform. Click [Configure Domain](#) from the Navigation menu. Select [Notification Settings](#). Use the toggles to enable or disable Email and Push Notifications. Click [Update](#) to save your selections.

Please note, even when **All Emails** on the top of the Notifications screen is toggled off, the following five essential emails will still be sent: Magic Link, Verify Email, Forgot Domain, Reset Password, MFA Verification Code.

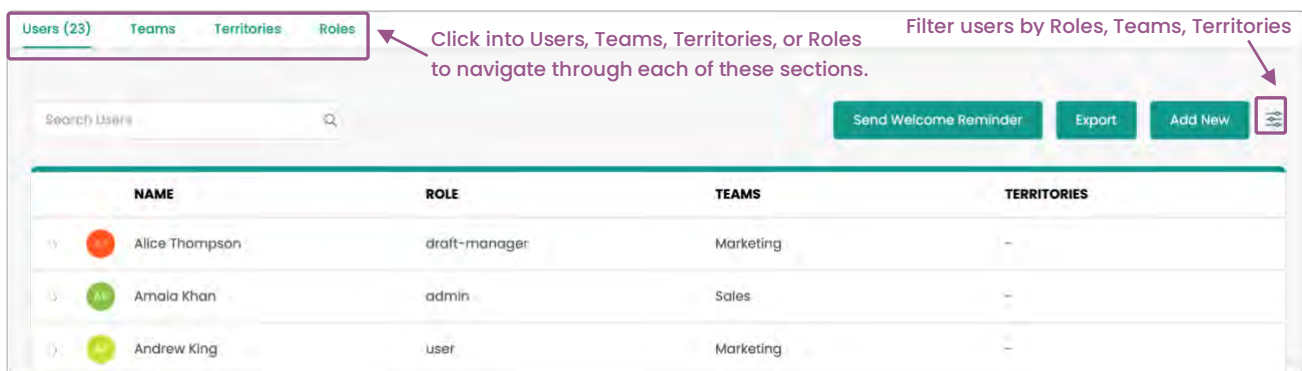


Notifications that can be set up:

- **General** – Notifications related to welcome emails and Launchpad assignments and deployments.
- **Content Management** – Set up admin-facing notification reminders for expiring and expired resources.
- **Coach** – Set up notifications related to Field Coaching and Certifications.
- **Events** – Set up notifications related to Event sessions.
- **Journeys** – Set up notifications related to Journey deployment.
- **Resources** – Set up notifications related to recent activity around Collections.

Setup – User Management Overview

User Management on ACTO allows administrative roles to manage the users, teams, territories, and roles on the platform. Click [Setup](#) from the Navigation menu and select [User Management](#). User Management provides a bird's-eye view of all users on the platform, their role, and the team and/or territory they belong to.



PROTIP Before adding users into the User Management System, please set up teams and/or territories.

User Management – How to Add Teams and Territories

Users are organized and segmented according to team and/or territory. Filter by **Teams** and **Territories** within **User Management** to view users by the team or territory they belong to. Click into the Teams or Territories sections to map out your company's org chart according to your team and/or territory hierarchies.



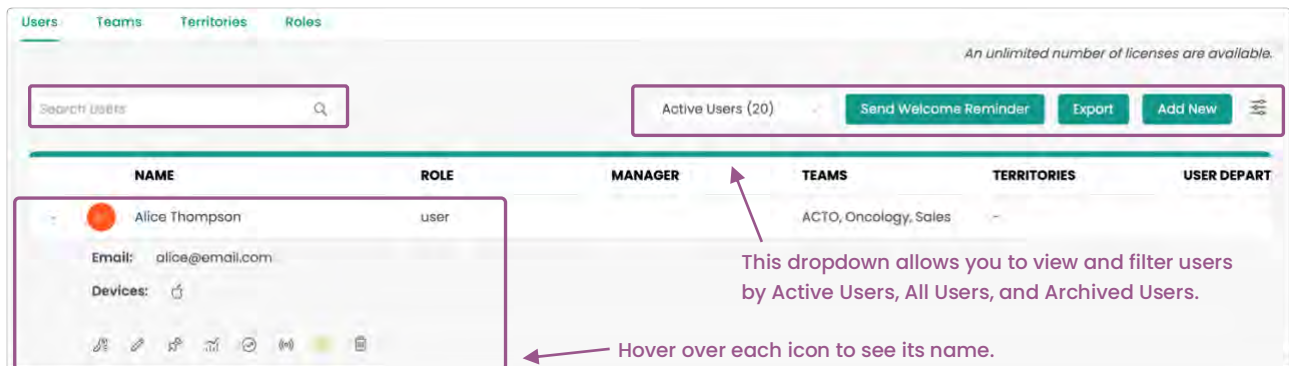
Click **More Options** to access options allowing you to add, update or edit teams/territories.

- Click **Setup** from the Navigation menu. Click into **User Management**. Select **Teams** or **Territories**.
- Click **Add** to add a new team or territory. Select its parent team – the team it falls under.
- Click **Edit** to update a team or territory's details

- Click **Tagging** to select existing tags or add keyword tags to the team or territory.
- Click **Analytics** to view team or territory specific reports related to ACTO capabilities.
- Click **Delete** to delete a team or territory.

User Management – How to Add or Update Users

The **Users** section in **User Management** displays all the users in the system. You may add new users individually or in bulk by clicking the **Add New** button. See [How to Add New Users](#) for detailed instructions. You may also edit and update each user's profile and permissions, and archive or delete users in the UMS.



This dropdown allows you to view and filter users by **Active Users**, **All Users**, and **Archived Users**.

Hover over each icon to see its name.

- Use the **Search bar** to search for specific users.
- Use the **Filter** to sort users by Role, Team, or Territory.
- Click **Add New** to add new users on the platform.
- Click **Export** to export users in a .csv format.
- Click **Send Welcome Email** to send a reminder email to users who have not yet logged in to the platform.

Click the arrow next to a user to view more options:

- The **Key** allows you to modify user permissions.
- The **Pencil** allows you to update user details.
- The **Pin** allows you to add tags to a user profile.
- The **Graph** gives you user deployment details.
- **Analytics** gives you user platform analytics.
- **Activity Log** gives a record of user platform activities.
- **Archive** allows you to quickly archive the user.
- The **Trashcan** allows you to delete a user profile.

User Management – How to Add New Users

When adding new users to the platform, you may add one at a time, or you may bulk upload users. Use the instructions below to proceed.

How to Bulk Upload New Users

1. Click [Add New](#) on the top-right of the User Management homepage. Select [Bulk Upload](#).
2. Create an Excel sheet with the columns: First Name, Middle Name, Last Name, Email, Language ID, Manager Email. Fill it out and reupload it. You may also download the provided template, fill it out, and reupload it.
3. Click [Upload Bulk Users](#) to complete.

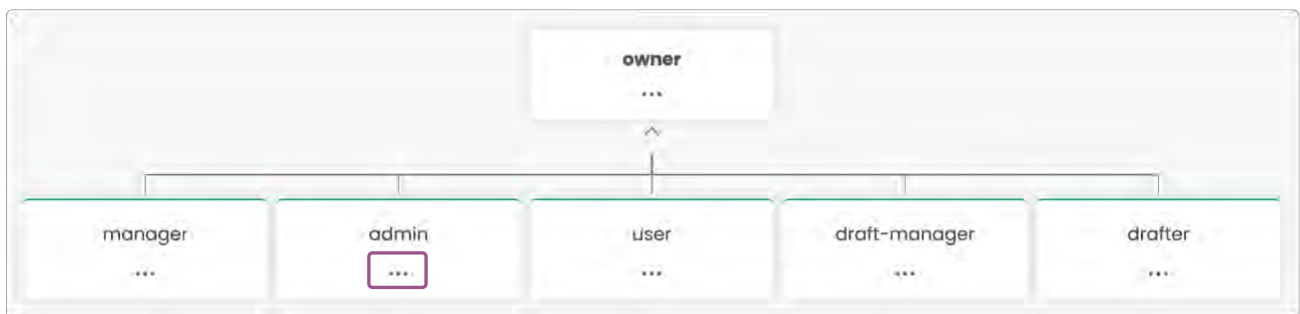
How to Add Individual New Users

1. Click [Add New](#) on the top-right of the User Management homepage. Select [Create User](#).
2. Enter or select the following required information: First and Last Name, Email, Role, Team and/or Territory, and Language. You may also enter optional fields like Job Title, Direct Manager, and User Department.
3. Click [Add User](#) to complete.

PROTIP Adding a Direct Manager allows users to have a unique identified manager within the domain.

User Management – How to Add, Edit, and Update Roles

On the ACTO platform, in addition to end-users there are several default Administrative roles: **Owner**, **Manager**, **Admin**, **Draft-Manager**, and **Drafter**. In the [Roles](#) section of [User Management](#), you may view, update, and tag these default user roles on ACTO. If required, you may also create custom roles with their own permissions.



Edit – Click [Edit](#) to customize a default role's permissions. Default roles may have permissions changed, but not the role name itself.

Add – Click [Add](#) to add a custom role under or next to the default role. Enter the new role name, description, and parent role. Click or unclick the checkboxes under **Permissions** to customize

NOTE Default administrative roles may have their access permissions customized by clicking [Edit](#), but their names may not be changed. End-user permissions may not be customized.

Tagging – Click [Tagging](#) to select existing tags or to add keyword tags to associate with the role.

User Management – Default Platform Roles Description

For detailed permissions for the default roles please refer to the [ACTO Default Role Permissions](#) table. *Please note, the default roles and permissions set out here can be customized on a domain level.*

- **Owner** – Each domain has one Owner who has full visibility and access to all parts of the platform. The Owner role can only be changed by reaching out to ACTO's Support Team.
- **Admin** – Admins have full visibility into the system including content creation and user management.
- **Drafter** – Drafters have visibility into content creation and uploading, organizing, and sharing content.
- **Manager** – Managers have access to the User Management System and their team's analytics.
- **Draft Manager** – Draft managers have a combination of Drafter and Manager permissions.
- **User** – Users cannot access any admin level capabilities. Users may only view and complete training, resources, coaching, and other content that has been deployed to them by administrators.

Tagging – How to Set up Clinical and Product Tags

Tagging content and resources allows each asset to be **organized, categorized, and filtered across the platform**. Tags are created around two main categories, **Clinical Data** and **Products**. These two categories are further broken down into **Therapeutic Area**, **Disease State**, **Product Lines** and **Products**.

Tagging – How to Add Therapeutic Area Tags

To get started, click **Setup** from the **Navigation menu** and select **Clinical Data**. Then click **Therapeutic Area**. Enter details in each section, and press the Green Checkbox or Enter Key to save the entered information. To edit or update a text field simply click into it.

The screenshot shows the 'Clinical Data' setup page. At the top, it says 'Add your organization's relevant information.' Below this are two buttons: 'Therapeutic Areas' (highlighted in green) and 'Disease States'. Below the buttons is a table with three columns: 'THERAPEUTIC AREA', 'DESCRIPTION', and 'DATE ADDED'. The table contains two rows: 'Dermatology' with a date of '14/12/2025' and 'Immunology' with a date of '01/08/2023'. The 'Immunology' row has a text input field for the description with the placeholder 'Enter description here'. To the right of the input field are icons for edit (pencil) and delete (trashcan). At the bottom left is a green button '+ Add Therapeutic Area'. At the bottom right is a green button with a white '1'.

THERAPEUTIC AREA	DESCRIPTION	DATE ADDED
Dermatology		14/12/2025
Immunology	Enter description here	01/08/2023

- To add a new therapeutic area, click **Add Therapeutic Area**. Select or type in the therapeutic area. Click the Trashcan icon to delete a therapeutic area.
- Hover over the field next to the therapeutic area. Click the Pencil icon to add a description. When you have entered the description, press enter to save.

Tagging - How to Add Disease State Tags

Click [Setup](#) from the Navigation menu and select [Clinical Data](#). Then click the [Disease State](#) button to enter details related to a disease state.

DISEASE STATE	DESCRIPTION	THERAPEUTIC AREA	DATE ADDED
Cardiovascular Disease	-	Select	01/08/2023
Diabetes	-	Endocrinology	01/08/2023

[+ Add Disease State](#) 1

- To add a new disease state, click [Add Disease States](#). Select or type in the disease state. Click the Trashcan icon to delete a disease state.
- Click the dropdown arrow under Therapeutic Area to select from previously created therapeutic areas.
- Click the **Pencil icon** to add further details related to the disease state. Here you're able to add extensive information related to the disease state: Pathophysiology, Epidemiology, Diagnosis, and Disease Management. You can drill down further into each of the above sections. [Please contact your CSM to learn more.](#)

Tagging - How to Add Product Line Tags

Click [Setup](#) from the Navigation menu and select [Products](#). Then click [Product Lines](#) to enter details related to a product line. Once this section is complete, you may add products associated with each product line.

PRODUCT LINE	# OF PRODUCTS	DESCRIPTION	DATE ADDED
Decongestants	1	-	01/08/2023
Inhaled Corticosteroids	1	-	01/08/2023

[+ Add Product Line](#) 1

- To add a new product line, click [Add Product Line](#). Select or type in the product line. Click the Trashcan icon to delete a product line.
- Hover over the # of Products text field. Click the **Pencil icon**. Enter the number of products. Press Enter. Hover over the Description column to enter a description. Press Enter to save.

Tagging – How to Add Product Tags

Click **Setup** from the Navigation menu and select **Products**. Then click the **Products** button.

The screenshot shows the 'Product Information' section with the subtitle 'Add your organization's product lines and products'. There are two buttons: 'Product Lines' and 'Products'. Below is a table with columns: PRODUCT, PRODUCT TYPE, PRODUCT LINE, and DATE ADDED. The table contains two rows: 'ABDO-Stitch' with 'Medical Device' as the product type and '15/01/2024' as the date added, and 'Medactine' with 'Drug' as the product type and '14/12/2025' as the date added. Each row has edit and delete icons. At the bottom left is a '+ Add Product' button, and at the bottom right is a green button with the number '1'.

PRODUCT	PRODUCT TYPE	PRODUCT LINE	DATE ADDED
ABDO-Stitch	Medical Device	Select	15/01/2024
Medactine	Drug	Select	14/12/2025

- To add a new product, click **Add Product**. Select or type in the product line. Click the Trashcan icon to delete a product.
- Click the dropdown arrow under Product Type to select whether the product is a Medical Device or Drug. Click the dropdown arrow under Product Line to select from the previously added product lines.
- Click the Pencil icon to add further details related to the product. Here you're able to add extensive information related to the product: Prescribing Information, Clinical Research, Competition and Market, Sales and Marketing Literature, Messaging, and Glossary. You can drill down further into each of the above sections. [Please contact your CSM to learn more.](#)

Object Management

Platform administrators may configure additional fields associated with the standard objects on the platform. There are currently 12 objects that may be configured. These are: **User**, **Learning Set**, **ActionPack**, **Collections**, **Resource**, **Scenarios**, **Certification**, **Field Coaching**, **Events**, **Session**, **Strategies**, **Deployments**.

The screenshot shows the 'Custom Fields' section with a 'Create New Field' button. Below is a table with columns: LABEL, NAME, DATA TYPE, and DESCRIPTION. The table contains one row: 'User Department' with 'User Department' as the name, 'Dropdown' as the data type, and 'Additional department field' as the description. There is a three-dot menu icon at the end of the row.

LABEL	NAME	DATA TYPE	DESCRIPTION
User Department	User Department	Dropdown	Additional department field

1. Click **Setup** from the Navigation menu. Select **Object Management**.
2. Click the object you want to configure. Click the **Create New Field** button. You may also edit the nomenclature in an existing custom field.
3. Proceed through the Object Management wizard. Enter or edit information in the **Essentials** section.

- Configuring standard objects on the platform allows you to track and store related values that may be unique to your organization.
- In the Object Management wizard, the Data Type field allows you to select from the following fields: Text, Text area, Number, Dropdown, Dropdown (Multi-Select), Date, Time, Date/Time, Checkbox
- Reporting is not available for custom fields.

How to Create Competencies

Competencies allows you to add default or custom competencies to resources across the platform. A competency, and its associated behaviors, defines what is being measured by the resource's deployment.

Click into **Setup** from the Side Navigation menu. Select **Gamification**. Here you can add competencies to the default platform roles, or to custom roles you have created. Adding competencies to a role allows you to select those competencies for a resource for that specific role. Click the **pencil icon** next to a role to get started.

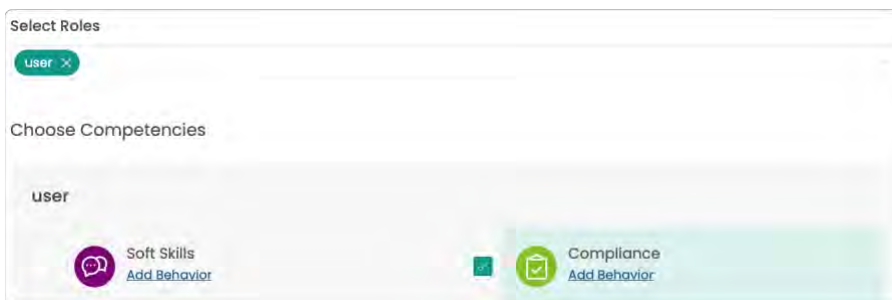
NAME	DESCRIPTION	BEHAVIOR
 Product Knowledge	This competency constitutes all the quintessential behaviour associated with product knowledge i.e. product understanding	   
 Clinical Fluency	This competency constitutes all the quintessential behaviour associated with clinical fluency i.e. positioning	   
 Soft Skills	This competency constitutes all the quintessential behaviour associated with soft skills i.e. articulation	   
 Selling Skills	This competency constitutes all the quintessential behaviour associated with Selling skills i.e. sense of urgency, closing skills	   
 Technical Skills	This competency constitutes all the quintessential behaviour associated with technical skills i.e. resource utilization	   
 Compliance	This competency constitutes all the quintessential behaviour associated with adherence to compliance, guidelines i.e. adherence	   

- To update or edit a competency make sure the competency is enabled. If a competency is not enabled, you will not be able to access it to add it to the resource. Click **Enable** or **Disable**.
- To edit the name and description of a competency, click the pencil icon to its right. You can update the names and descriptions for the default competencies to suit your needs.
- You may add associated behaviors to competencies. When you select the competency, you can then select from the behaviors you have added to it. To add a behavior to a competency, click **Add Behavior**.

How to Add Competencies to Resources

Competencies can be selected for **Learn** (Learning Sets, ActionPacks, and Lessons), **Resources** (Collections), **Coach** (Scenarios, Certifications, and Field Coaching), **Events**, **Journeys**, **CxZone** (practices), **Content Management** (resources). **For quizzes, assessment forms, polls, registration forms, and surveys competencies can be added to the full resource or individual questions within the resource.**

To add a competency to any of the above resources, click **More options** – the three dots – on the side of the resource. Select **Competencies** from the options menu. Select the role you want to add competencies to.

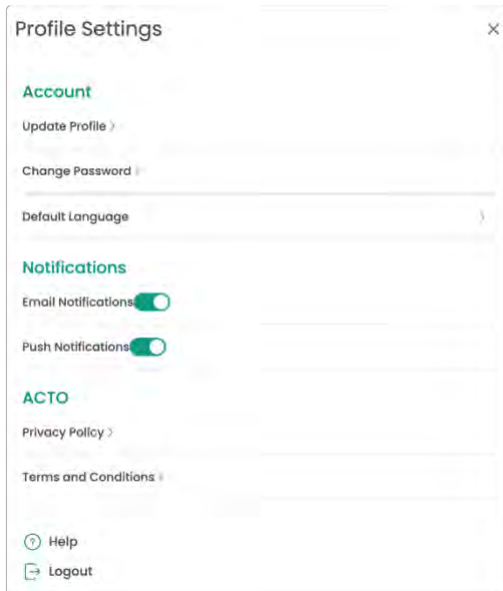


Select more than one role at a time. You can access different competencies applicable to each role selected.

Select competencies and / or behaviors for each role.

How to Update Personal Profile Settings

You may update your personal profile on ACTO. To access **Profile Settings**, click your name on the top-right of the screen and select **Settings**. The following account and notification settings are available from this menu.



Click **Update Profile** to update your profile picture, name, contact number, country, and language. For email or role updates, another platform administrator will need to make updates for you.

Click **Change Password** to change your account password. This is not available for users logging in with SSO credentials.

Click **Default Language** to update your account's default language.

Toggle to enable **Email Notifications** and **Push Notifications**. Enabling these ensures that you receive notifications when you are assigned or deployed content and resources on the platform.

Click **Help** to send in a support request. You can also contact support at support@actoapp.com.

[Click back to Admin Guide to Platform Essentials Table of Contents](#)



Admin Guide to Content Management



Admin Guide to Content Management

The Content Management System (CMS) on ACTO is a digital library for all your resources. Use Content Management to create, upload, tag, and organize all resources on the platform in one place. Interactive Form Resources like Quizzes, Surveys, and Digital Signatures are also created and stored in Content Management.

Click into any of the links below to get started.

Table of Contents

1. [Learning Objectives](#)
2. [How to Access Content Management](#)
3. [Content Management Quick Overview](#)
4. [What is Content Management?](#)
5. [How to Create a New Folder](#)
6. [How to Add Resources into Content Management](#)
7. [What Resource Types Are there?](#)
8. [How to Edit or Update Resources](#)
9. [What are Key Takeaways?](#)
10. [How to Add Forms into Content Management](#)
11. [What Form Types are there?](#)
12. [Forms – How to Create a Quiz](#)
13. [Forms – How to Create a Survey](#)
14. [Forms – How to Create a Digital Signature](#)
15. [Forms – How to Create a Poll](#)
16. [Forms – How to Create a Field Coaching Report](#)
17. [Forms – How to Create an Assessment](#)
18. [Forms – How to Create an Evaluation](#)
19. [How to Review Expired Resources](#)
20. [Resources Standard Dashboards](#)



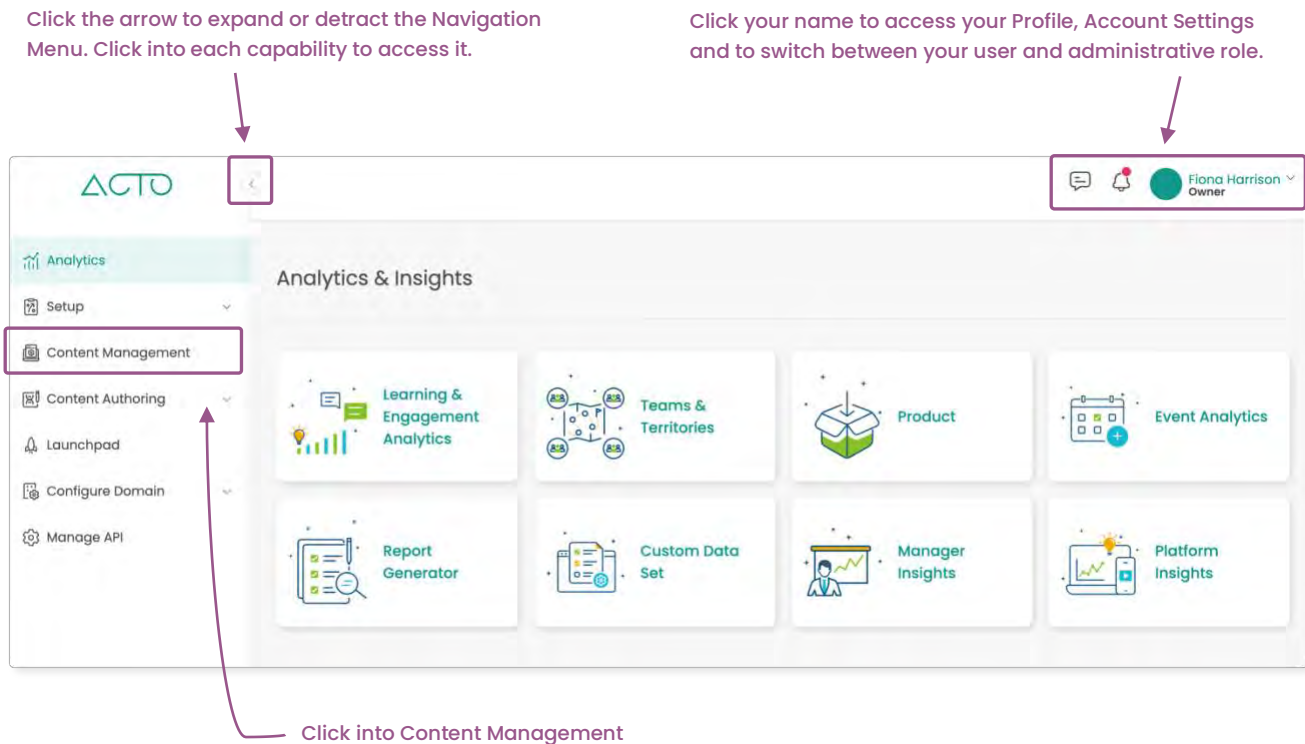
Admin Guide to Content Management

Learning Objectives

- How to organize Content Management
- How to upload resources into Content Management
- How to set permissions for resources in Content Management
- How to create and add Form resources into Content Management

How to Access Content Management

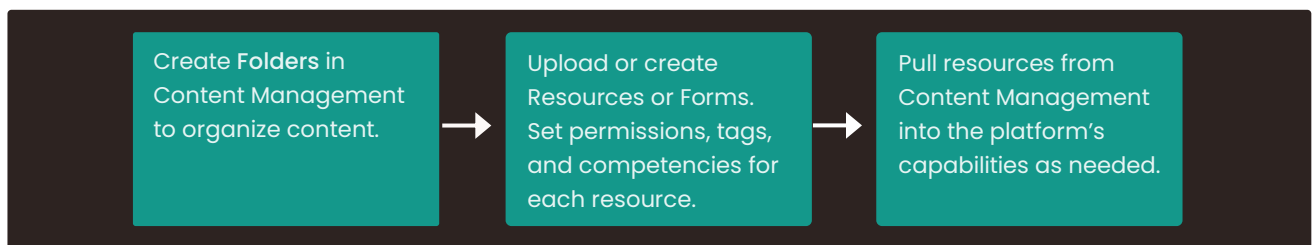
Platform Admins can access all the resources in **Content Management**. Drafter, Manager, and Draft Manager roles can only access resources shared with them. [This refers to default platform permissions. Permissions can be updated on a role or individual-based basis in ACTO's User Management System.](#)



1. Log in to ACTO on a computer. Please use Google Chrome or Mozilla Firefox
2. Make sure you are in administrative mode. End-users cannot access admin functionality.
3. Expand the Navigation menu on the left of your screen
4. Click into Content Management.

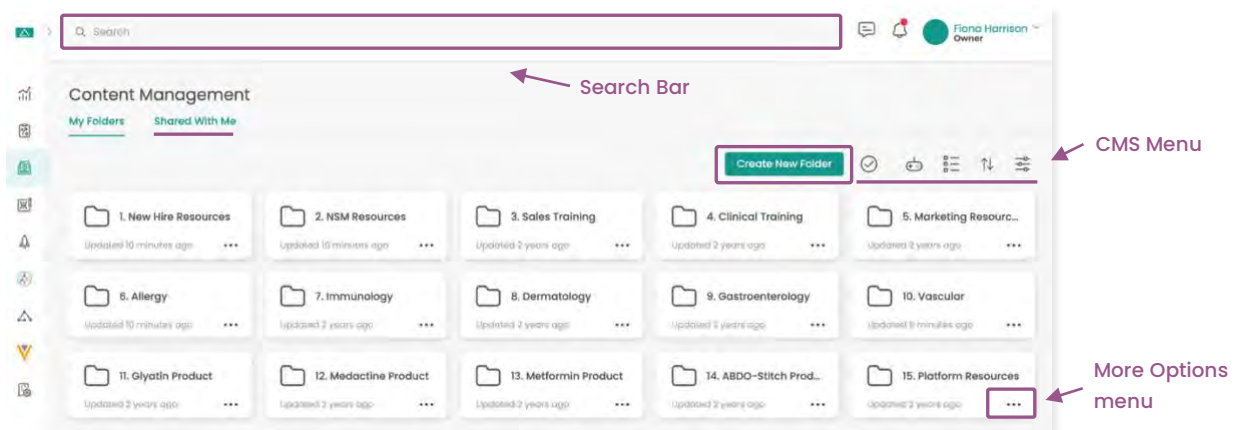
Content Management Quick Overview

- **Content Management** is where resources are created, uploaded, stored, and updated on ACTO.
- Resources must be organized into folders. Admins may invite other platform administrators to collaborate. Collaborators may access, update, and modify folders in Content Management.
- Each resource added can have custom permissions. Depending on the permissions set for a specific resource, end-users may be able to **present, share, favorite, download, or print** the resource.
- **Forms** are interactive resources created and stored in Content Management. These include **Quiz, Survey, Digital Signature, Poll, Field Coaching Report, Registration, Assessment, and Evaluation Forms**.
- Resources uploaded in Content Management may be pulled into different tools across the platform. Quizzes, Surveys, Polls, and Digital Signatures may be added into **Learn**. FCRs, Assessment, and Evaluation Forms may be added into **Coach**. Registration Forms may be added to **Events**.



What is Content Management?

Content Management is a digital library for all your resources. **It is the central repository and Source of Truth for where a single copy of a resource is created, uploaded, organized, shared, and updated on the platform.**

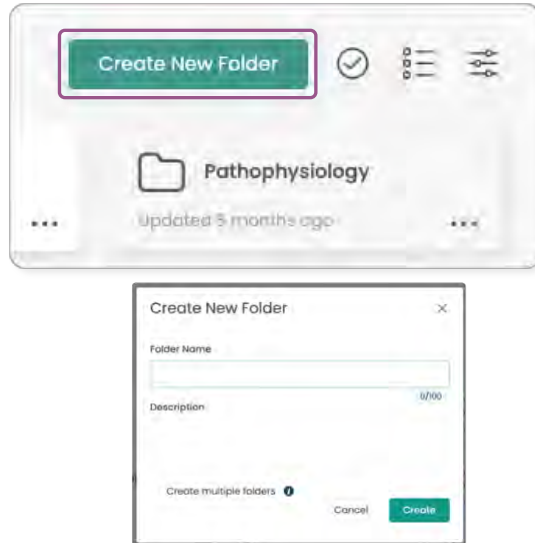


- Use the **Search Bar** to search within the CMS.
- Use **Create New Folder** to create a new folder.
- Use the **Checkmark icon** to select multiple folders or resources at one time.
- Use the **Checklist icon** to switch between list view and icon view. The CMS default is icon view.
- Use the **up-and-down arrows** to sort folders or resources by Name, Date, or Recently Edited.
- Use the **Filter icon** to select and apply filters.
- Click **Shared With Me** to access shared folders.
- The **More Options** menu to the right of any folder or resource provides a menu of possible actions.

How to Create a New Folder

How to Create a New Folder in Content Management

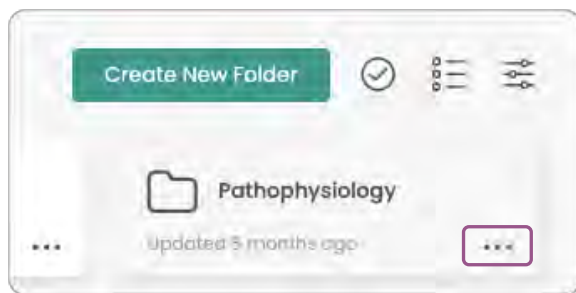
Follow the instructions below to create new a folder and organize your resources in Content Management.



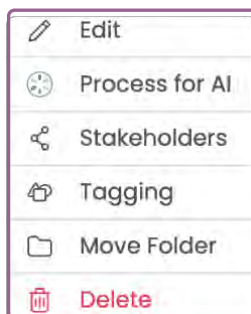
- Click into **Content Management** from the Side Navigation menu.
- Click **Create New Folder** on the top-right of the screen. Enter the folder name and description. Click **Create**.
- To create multiple folders at once, click **Create New Folder**. Click the **Create multiple folders** checkbox. Once you create a folder, the same dialogue box will reopen to create the next folder.
- To add sub-folders into a folder, click into the parent folder, click **Add New** and select **Folder**.

How to Edit or Update a Folder in Content Management

Once a folder is created it may be edited and updated to add stakeholders, tags, or to move it into another folder within Content Management. To edit folder details, click the **More options menu** *** on the side of a folder.



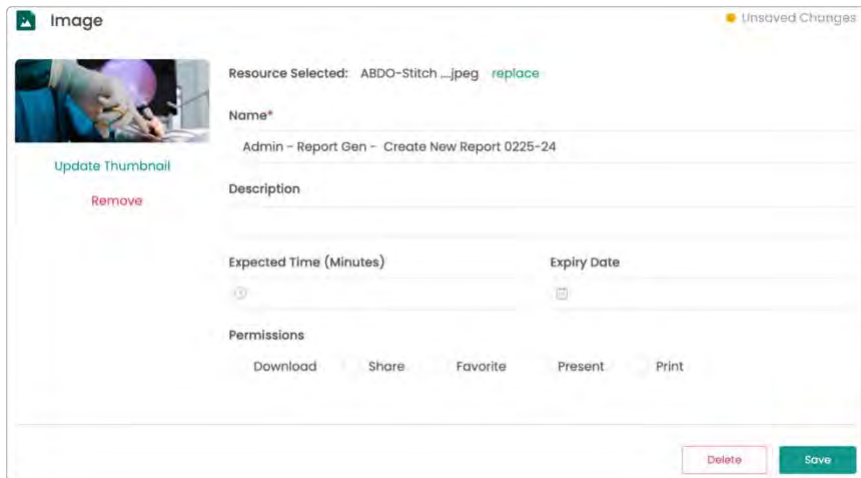
When you process a resource for AI, the ACTO AI processes the resource so that it may later be used for any AI-powered action on ACTO, if you so choose.



- Select **Edit** to change the folder name and add or update a folder description (optional).
- Select **Stakeholders** to invite other administrative roles to collaborate on a folder. Click **Update** or **Delete** to select their permissions. Click **Select All** to give them access to both permissions. Collaborators can view shared folders in the **Shared with Me** section of Content Management.
- Select **Tagging** to select or add relevant tags and keywords to the folder.
- Select **Move Folder** to move the folder into another area within Content Management.
- Select **Delete** to delete a folder and its contents. To delete or move multiple folders at once, click the checkmark on the top-right of the Content Management screen, and select multiple folders.

How to Add Resources into Content Management

Add resources into Content Management by uploading the resource files from your computer, or by creating new resources directly on the platform. When you edit or update a resource in Content Management, that change will be reflected everywhere else that resource exists on the platform.



Resource Permissions

Please note, end-users can only Download, Share, Favorite, Present, and Print resources that you enable for these purposes. By default, all the permissions for a resource are disabled. To set or update them at any other point, click the **More Options** menu next to a resource, and select **Permissions**.

1. Select the CMS folder into which you would like to add resources.
2. Click the **Add New** button on the top-right of the screen. Select **Resource** to upload or create new resources. Proceed through the resource wizard where you customize resource level settings and permissions.
3. After you upload or create a resource, you may scroll down to upload or create another resource. This allows you to load multiple resources at one time. Click **Save All** on the top of the resources screen to save all the added resources at one time.

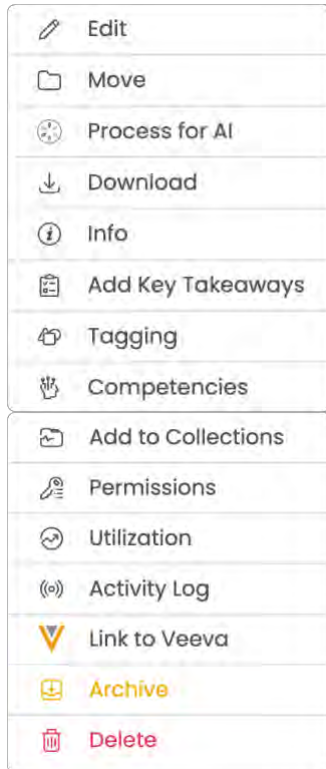
- **Name** – Enter the resource name.
- **Description** – Enter an optional resource description.
- **Expected Time** – Enter an optional expected time to completion for the resource.
- **Expiry Date** – Enter an expiry date for the resource. Note that when a resource expires, it is no longer visible to end-users *Not applicable to Forms*
- **Permissions** – Toggle the checkboxes for the resource-level permissions. This impacts what actions the end-user can take with each resource.
- **Add Thumbnail** – Add a thumbnail image for the resource to make it more engaging and identifiable.

What Resource Types Are There?

- **Uploaded Resources** – Resources you can upload include images, audio files, documents, links, PDF, PPT, Excel and SCORM files. For a full list of supported files, formats, and upload limits click [here](#).
- **Created Resources** – Resources created directly in the platform include self-recorded videos, screen-capture videos, and checklists. Created resources also include Forms. See below.
- **Forms** – Forms are resources created on the platform. These are: Assessment forms, Evaluation forms, Field Coaching Reports, Quizzes, Polls, Surveys, Digital Signatures, and Registration Forms.

How to Edit or Update Resources

When a resource is first uploaded, the resource wizard walks you through resource details. To edit, update, upload a new version, or take other actions click the More options icon *** on the bottom right of a resource.



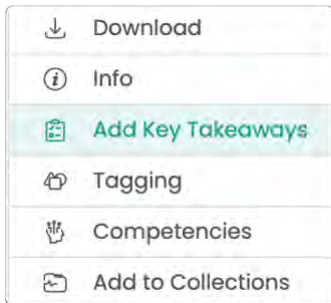
- Click **Edit** to update resource details like name, description, expected time, expiry date, and permissions; or to upload a new version.
- Click **Move** to move the resource into another folder within the CMS.
- Click **Process for AI** to vectorize older resources for potential use with ACTO's AI-tools. Newer resources automatically have this functionality.
- Click **Download** to download the resource.
- Click **Info** for information like resource creation and update dates, as well as what ActionPacks and Collections the resource is being used in.
- Click **Add Key Takeaways** to select a secondary resource from Content Management to add as a supplement to the resource. If the resource already has a supplement, you will see **Update / Remove Key Takeaways**.
- Click **Tagging** to add or update resource tags.
- Click **Competencies** to add or update resource competencies.
- Click **Add to Collections** to add the resource directly into a Collection.
- Click **Permissions** to add, edit, or update resource permissions.
- Click **Utilization** to see where the resource is being used in Learn or Resources. Here you can filter by Deployment, Learning Set, ActionPack, Topic or Lesson and export this information in excel or csv format.
- Click **Activity Log** to see a record of changes and updates to the resource, who made those updates, and when. The Activity Log tracks changes including file creation, file relocation, archiving and unarchiving, updating tags, updating forms (for example, updating quiz answer choices).
- Click **Archive** to archive the resource. You may click the **View Resource Usage** popup before doing so to see where the resource is being utilized.
- Click **Delete** to delete the resource.

How to Update a Resource File

When you have an updated version of a resource, you can either replace it, or you can archive the old version and upload a new one. To replace an existing resource, click the **More options** menu next to the resource, and select **Edit**. Click **Replace** and upload the new version. The resource will be updated in every location it exists in. If you would like to upload a new resource without replacing the old version, you can click the **More Options** menu and select **Archive** so that end-users can no longer view the resource. Then upload the new resource into the CMS, and add it to Modules and Collections as applicable.

What Are Key Takeaways?

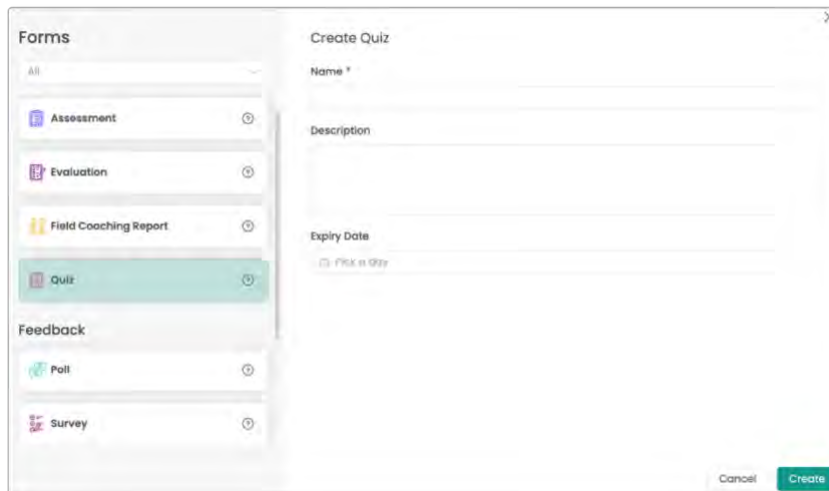
Key Takeaways are secondary resources linked to primary resources as supplementary content. This allows users to quickly refresh on messaging or understand how to better speak to a core resource. For example, a lengthy video or document may have a checklist of key points attached to it. [Only videos, including YouTube videos, and checklists can be Key Takeaways. Checklists themselves may not have added Key Takeaways.](#)



1. Click **More options** *** next to a resource. Select **Add Key Takeaways**.
2. Browse through Content Management for your secondary resource. Select the resource and click **Add**.
3. To update or remove Key Takeaways, click **More Options** next to a resource and select **Update Key Takeaways** or **Remove Key Takeaways**.

How to Add Forms into Content Management

Forms are interactive resources created in Content Management that you may use and reuse across the platform's capabilities. To add a Form into a CMS folder, click the **Add New** button on the top-right of the folder. Select **Form** and select the form you would like to create.



Organize Forms

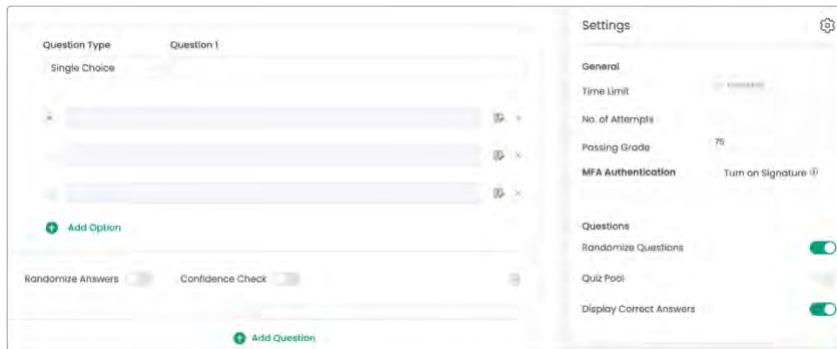
Whether you incorporate form resources into an existing folder structure, or create folders just for forms, organizing forms by type is useful so you can find, leverage, and navigate them easily within the CMS.

What Form Types Are There?

- **Quiz** – Use regular knowledge checks to assess learner understanding and training retention.
- **Survey** – Use Surveys to request feedback from teams on the effectiveness of training and resources.
- **Digital Signature** – Use Digital Signatures to acquire e-signatures and signoffs for compliance purposes.
- **Poll** – Use Polls to quickly poll and gather information from team members.
- **Field Coaching Report** – Use FCRs to evaluate team member performance in the field.
- **Assessment** – Use Assessment Forms to assess and certify team members.
- **Evaluation** – Use Evaluation Forms to evaluate learner responses to Coaching Scenarios.
- **Registration** – Use Registration Forms to acquire attendee information for the Events tool.

Forms – How to Create a Quiz

To create a Quiz, click **Add New** on the top-right of a CMS folder. Select **Form** and select **Quiz**. Enter the quiz name, an optional description and an expiry date. Click **Create**.

The screenshot shows the 'Add Question' interface. On the left, the 'Question Type' is set to 'Single Choice'. Below it, there are three text input fields for answers, each with a radio button to its left. At the bottom left, there are toggle switches for 'Randomize Answers' and 'Confidence Check'. At the bottom right, there is a green 'Add Question' button. On the right side, the 'Settings' panel is visible, showing options for 'Time Limit', 'No. of Attempts', 'Passing Grade', 'MFA Authentication', 'Randomize Questions', 'Quiz Pool', and 'Display Correct Answers'.

When you create a quiz, you can customize the settings for the quiz on the right-side of the screen.

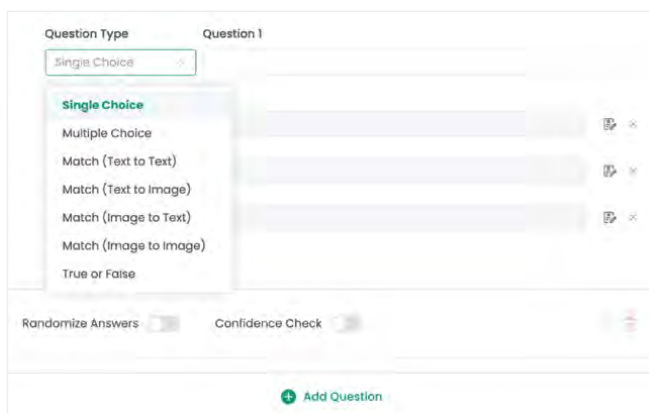
Settings include the time limit, number of attempts, and passing grade. You can also set quiz wide question settings here.

What different question types are there?

- **Single Choice** – Asks learners to select the correct choice from provided options.
- **Multiple Choice** – Asks learners to select multiple correct choices from the provided answer options.
- **Match (Text to Text)** – Asks learners to match the correct information text-to-text.
- **Match (Text to Image)** – Asks learners to match the correct text-to-image.
- **Match (Image to Text)** – Asks learners to match the correct information image-to-text.
- **Match (Image to Image)** – Asks learners to match the correct information image-to image.
- **True or False** – Asks learners to select whether a statement is True or False.

How to Add a Quiz Question

Follow the instructions below to walk through each step of adding a new question to a quiz. Please note, to move a question to another spot in the quiz, click and drag the vertical dots to the left of the question type.

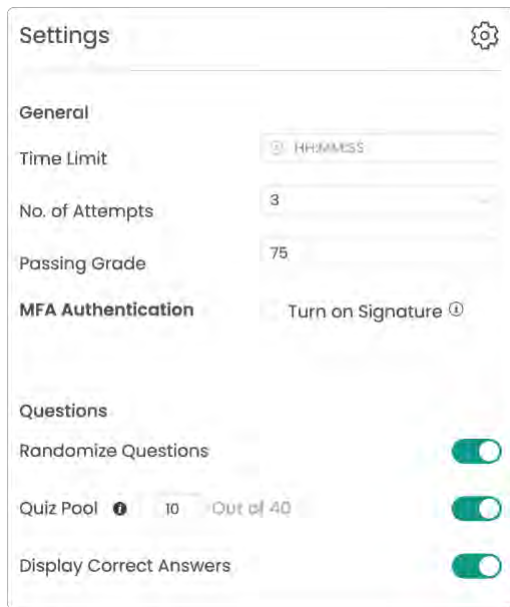
The screenshot shows the 'Add Question' interface with a dropdown menu open for 'Question Type'. The dropdown lists 'Single Choice', 'Multiple Choice', 'Match (Text to Text)', 'Match (Text to Image)', 'Match (Image to Text)', 'Match (Image to Image)', and 'True or False'. The 'Single Choice' option is currently selected. The rest of the interface, including the answer fields and settings, is visible in the background.

- Select a **Question Type** from the quiz dropdown.
- Enter the question. There is a 500-character limit.
- Enter the answer. There is a 500-character limit.
- Select the radio button for the correct answer.
- To add an **Answer Explanation** to an answer, click the **pen-and-paper** icon to the answer's right.
- To add another answer option select **Add Option**.
- To delete an answer, click the red **x** to its right.
- To randomize the answer order, enable the **Randomize Answers** toggle.
- To set a confidence check for the question, toggle **Confidence Check**.
- Click **Add Question** to add the next quiz question.

What is a Confidence Check? Confidence Checks can be added to individual quiz questions. A Confidence Check asks the learner how confident they are with their answer selection: Low, Medium, or High. This provides insight into learner confidence which, depending on the answer selected, can be measured against their understanding.

How to Set Quiz Settings

To set or update quiz settings, please look under the **Settings** section on the right-side of your screen.



Time Limit – You can set a time limit for users, or leave this field blank which provides them with unlimited time.

No. of Attempts – Set between 1 and 20 attempts. This allows to learner to try again as many times as has been set.

Passing Grade – Set a passing grade for the quiz.

MFA Authentication – Click this to set up a Digital Signature requirement when learners complete the quiz.

Randomize Questions – Toggle this to have learners see quiz questions in a randomized order.

Quiz Pool – Toggle this to set up a quiz pool. A quiz pool allows you create up to five variations of a quiz from a bank of questions.

Display Correct Answers – Toggle this to have learners view correct answers once they complete a quiz. If you set this up and multiple attempts, learners will see correct answers for their next try.

Quiz Pool Settings

Enable a quiz pool under **Settings**. This allows you to pull quiz questions from a “pool” of total questions created for the quiz. Depending on the number of questions you would like each quiz to be, up to five versions of the quiz can be generated. When quiz pooling is set up, each question now has the toggle, **Required Question**. Enable this toggle if you would like the question to be required in **every** version of the quiz created from the pool.

How to Preview a Quiz

Previewing a quiz allows you to view and go through a quiz the same way an end-user would. To access this, click the **Preview** button on the top-right of the quiz page.

How to Export Quiz Questions

To export quiz questions, click **Export Questions** on the top-right of the quiz page. This will download an .xlsx file. The columns available in this exported file are **Question Type**, **Question**, **Answer Option**, **Correct Answer**, **Answer Explanation**, **Randomized Answers**, **Confidence Check**, **Required Question**, and **Resource Reference**.

Forms – How to Create a Survey

Surveys allow you to get feedback from learners. To create a survey, click [Add New](#) on the top-right of a CMS folder. Select [Form](#) and [Survey](#). Enter the survey name, an optional description, and expiry date. Click [Create](#).

Standalone Surveys – Please note, you can also toggle Standalone survey when creating a survey. This simply means that the survey you create does not need to live within an ActionPack or deployed via Launchpad. It can be shared to platform users via link or QR code.



1. Click into the folder you want to add a survey. Click [Add New](#). Select [Form](#) and [Survey](#). Enter the survey name and an optional description and Expiry Date. Click [Create](#).
2. Select a survey question type from the dropdown menu. Enter the question and answer options. Click [Add Option](#) to enter additional answer options. Toggle [Mandatory](#) if the question is mandatory.
1. Click [Add Question](#) to enter the next question. Click [Preview](#) to view the survey the way an end-user would.

- **Single Choice** – Asks respondents to select one from the provided options.
- **Multiple Choice** – Asks respondents to select multiple choices from the provided options.
- **Rating** – Asks respondents to select a star rating from one to five stars.
- **Comments** – Allows respondents to enter a text response to a question.

Forms – How to Create a Digital Signature

A **Digital Signature** allows you to enter custom text that end-users are required to sign off on. End-users can sign off with their computer trackpad or mouse. If using a mobile device, they may use their finger or a stylus.



1. Click into a folder in the CMS. Click [Add New](#). Select [Form](#) and then [Digital Signature](#). Click [Create](#).
2. Enter the Digital Signature name.
3. Enter the Digital Signature statement. This is the text that users will be required to acknowledge or sign off on. Click [Create](#).
4. Click [Preview](#) to view the Digital Signature the same way that an end-user would see it.

Forms – How to Create a Poll

Polls allows you to quickly gather valuable insight from learners by asking them to respond to poll questions. To create a poll, click [Add New](#) on the top-right of a CMS folder. Select [Form](#) and select [Poll](#). Enter the poll name, an optional description and an expiry date. Click [Create](#).



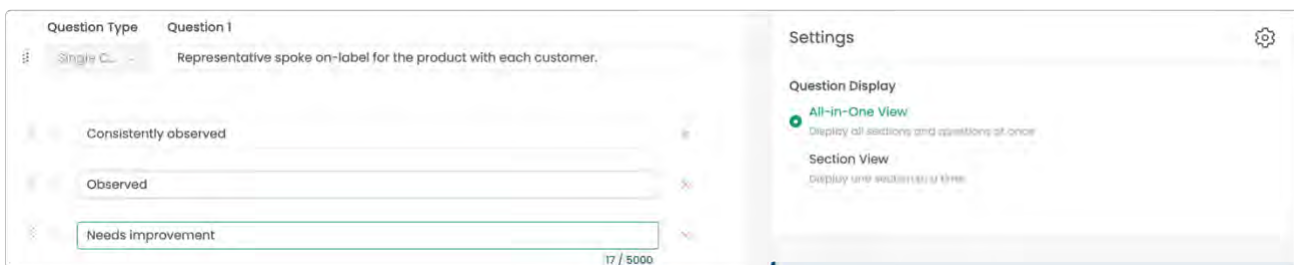
1. Click into the Folder you want to add a poll into. Click [Add New](#). Select [Form](#) and then [Poll](#). Click [Create](#).
2. On the poll screen, under Settings, toggle [Display Poll Results](#) on if you would like to end-users to view the results of the poll once they submit their response.
3. Select a poll question type from the dropdown menu. Enter the question and answer options. Click [Add Option](#) to enter additional answer options.
4. Click [Add Question](#) to enter the next question. Click [Preview](#) on the top-right to view the poll the way an end-user would.

- **Single Choice** – Asks respondents to select one from the provided options.
- **Multiple Choice** – Asks respondents to select multiple choices from the provided options.
- **Rating** – Asks respondents to select a star rating from one to five stars.
- **Linear Scale** – Asks respondents to move a slider down a scale and select a numerical response.

Forms – How to Create a Field Coaching Report

Field Coaching Reports (FCRs) are rubrics used by managers to evaluate their team members during live coaching interactions. Managers use the Coach tool to fill out FCRs during a field coaching session.

To create an FCR, click [Add New](#) on the top-right of a CMS folder. Select [Form](#) and select [Field Coaching Report](#). Enter the FCR name, an optional description and an expiry date. Click [Create](#).



When you create an FCR, Evaluation, or Assessment, note the [Evaluation Description](#) under each question. This allows you to clearly define the criteria for each answer option and provide this benchmark to managers.

1. Click into the Folder you want to add a form into. Click **Add New**. Select **Form** and choose **Field Coaching Report**.
2. Under Settings, select your display preferences: **All-in-One View** or **Section View**.
3. Name the FCR sections as applicable.
4. Add questions into the FCR by clicking **Add Question** and selecting a question type.
5. Click **Question Settings**. Select **Mandatory** if Managers must respond to the question. Select **Visible** to have Manager feedback visible to end-users. Select **Answerable by User** if this is applicable. Select **Comments** to allow Managers to add additional comments.

- **Single Choice** – The Manager selects the most appropriate response from provided options.
- **Multiple Choice** – The Manager selects all appropriate responses from provided options.
- **Rating** – The Manager selects a rating from one to five stars. Add a description of each star rating to clearly define what it means.
- **Comments** – A text field where Managers can respond to specific questions. **NOTE** Add **Allow Comments** under **Question Settings** to the other question types to add a text field to that specific question.

Forms – How to Create an Assessment

Assessment Forms are rubrics used to guide managers as they certify team members using the Coach tool. To create an assessment, click **Add New** on the top-right of a CMS folder. Select **Form** and select **Assessment**. Enter the assessment name, instructions for the certifier and an expiry date. Click **Create**.

Add points to each question. Set the Passing Criteria here under Settings. You may also keep all points at zero if points not applicable.

1. Under Settings, select your display preferences: **All-in-One View** or **Section View**.
2. Name the assessment sections as applicable.
3. Add questions by clicking **Add Question** and selecting a question type. Add an **Evaluation Description** for each answer option.
4. Toggle **Mandatory** if Managers must respond to the question. Select **Visible** to have the question visible to end-users. Select **Allow Comments** to allow Managers to add additional comments.

- **Single Choice** – The Manager selects the most appropriate response from provided options.
- **Multiple Choice** – The Manager selects all appropriate responses from provided options.
- **Rating** – The Manager selects a rating from one to five stars. Add a description of each star rating to clearly define what it means.
- **Comments** – A text field where Managers can respond to specific questions.

Forms – How to Create an Evaluation

Each Coaching scenario has an Evaluation Form in it. Managers use the Evaluation Form to evaluate the end-user's response to the scenarios that are deployed to them. To create an evaluation, click [Add New](#) on the top-right of a CMS folder. Select [Form](#) and select [Evaluation](#). Enter the name, description, and an expiry date. Click [Create](#).



1. Click into the Folder you want to add a form into. Click [Add New](#). Select [Form](#) choose [Evaluation](#).
2. Enter the evaluation name, description, and an expiry date if applicable.
3. Add questions by clicking [Add Question](#) and selecting a question type. Add an [Evaluation Description](#) for each answer option.
4. Toggle [Mandatory](#) if Managers must respond to the question. Select [Visible](#) to have the question visible to end-users.

- **Single Choice** – The evaluator selects the most appropriate response from provided options.
- **Multiple Choice** – The evaluator selects all appropriate responses from provided options.
- **Rating** – The evaluator rates the user's response from one to five stars. Add a description of each star rating to clearly define what it means.
- **Comments** – A text field where evaluators can enter text in response to a specific question.

How to Review Expired Resources

When resources in the CMS are expired or about to expire, you are notified in one of two ways. Depending on the domain-wide [Notification Settings](#) that have been set up, platform admins receive one or more emails when content is expiring. You can also click in to see expired or expiring content from the main CMS page.

Why should you use resource expiry dates? When uploading or creating a resource, adding expiry dates is a great way to manage out-of-date resources. With most resource types, once a resource expires it is greyed out for the admin and not available to the learner. This is not the case with form resource types. Once a form is expired, you can rename it to include ARCHIVED in its name, so that it is clear it is inactive. You can also move it into a folder specifically for expired resources.

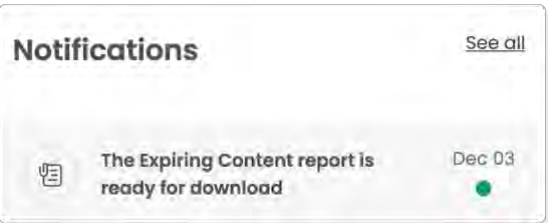
If there is expired or expiring content on your domain, you will see a pop-up on the top of the CMS. Click [View](#).



On this page you will view all the content that is expired or expiring. You can filter by **All**, **Expired**, or **Expiring** and **Year**. To update, archive, or take other actions with the resource click **More Options** on the right side of the resource. **Please note, currently you are not able to archive form-type resources.**

NAME	EXPIRY DATE	CREATED ON	LAST UPDATED	FOLDER
FCR 2025	Expired	07/11/2025	07/11/2025	Forms
Key Takeaways for Childre...	Expiring	17/11/2025	21/11/2025	6. Allergy
Scenario Evaluation Form	Expiring	04/11/2025	21/11/2025	Forms

To pull an **Expiring Content Report**, click the **Export** button on the top-right of the Expiring Content page. When your report is ready to be downloaded, you will see this under **Notifications** on the top-right of your screen. Click to download the report.



The columns available in the **Expiring Content Report** are Status, Expiry Date, Created on, Last Updated, Folder, Learn Path, Collection Path.

Resources Standard Dashboards

Standard dashboards on the resource level are available within Content Management for Quizzes, Polls, Surveys, Digital Signatures, and Resources. To access a dashboard, click **More Options** on the resource you would like to see a dashboard for, and select **Dashboard**.

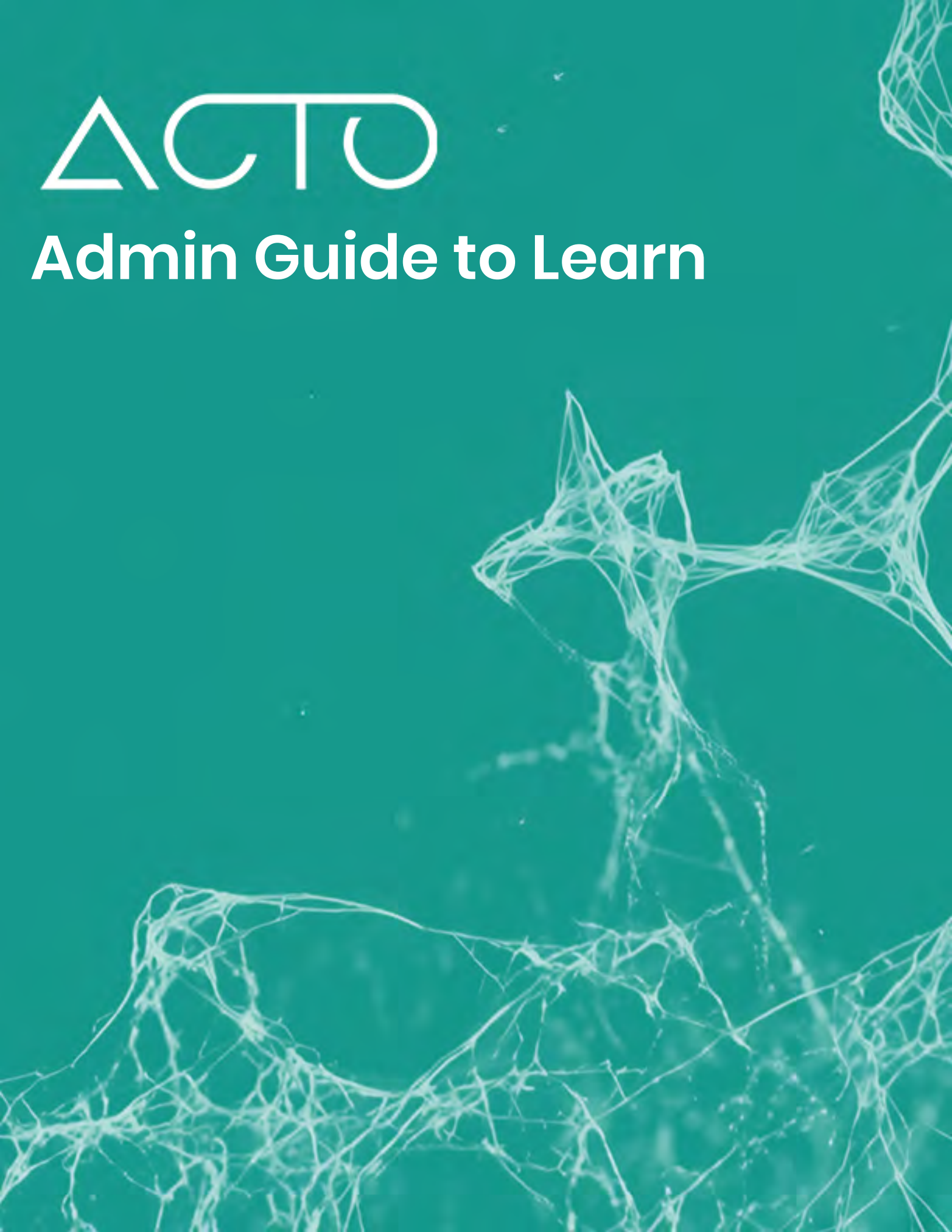
These dashboards allow you to **drill down and pull Key Visual Metrics on an individual resource level within the Content Management System**. They provide a **bird’s eye view on resource-level interaction and engagement**, and allow Managers to **drive a culture of accountability** by pulling key insights around what’s working and what can be improved! To learn more, please reference the **Admin Guide to Dashboards**.

[Click back to Admin Guide to Content Management Table of Contents](#)

The logo for ACTO, featuring the letters A, C, T, and O in a stylized, white, sans-serif font. The 'A' is composed of two triangles, the 'C' is a simple curve, the 'T' is a vertical line with a horizontal bar, and the 'O' is a simple circle.

ACTO

Admin Guide to Learn





Admin Guide to Learn

Learn on ACTO allows platform administrators to **create, organize, edit, and update** training modules called **ActionPacks**. ActionPacks provide learners with a truly immersive experience built on proven learning pedagogies to boost engagement and retention.

Click into any of the links below to get started.

Table of Contents

1. [Learning Objectives](#)
2. [How to Access Learn](#)
3. [Learn Quick Overview](#)
4. [How to Create a Category](#)
5. [How to Create a Learning Set](#)
6. [How to Edit or Update a Learning Set](#)
7. [How to Create an ActionPack](#)
8. [How to Edit or Update an ActionPack](#)
9. [Key Structural Elements in an ActionPack](#)
10. [How to Add Topics and Lessons to an ActionPack](#)
11. [How to Add Content into a Lesson](#)
12. [What are the Available Resource Types?](#)
13. [What are Forms?](#)
14. [How to Make an ActionPack a Template](#)
15. [How to Generate Shareable Links in Learn](#)
16. [How to Rearrange Content in Learn](#)
17. [How to Archive Learning Sets and ActionPacks](#)
18. [How to Duplicate Learning Sets and ActionPacks](#)
19. [How does an End-User View Deployed Content in Learn?](#)

Admin Guide to Learn

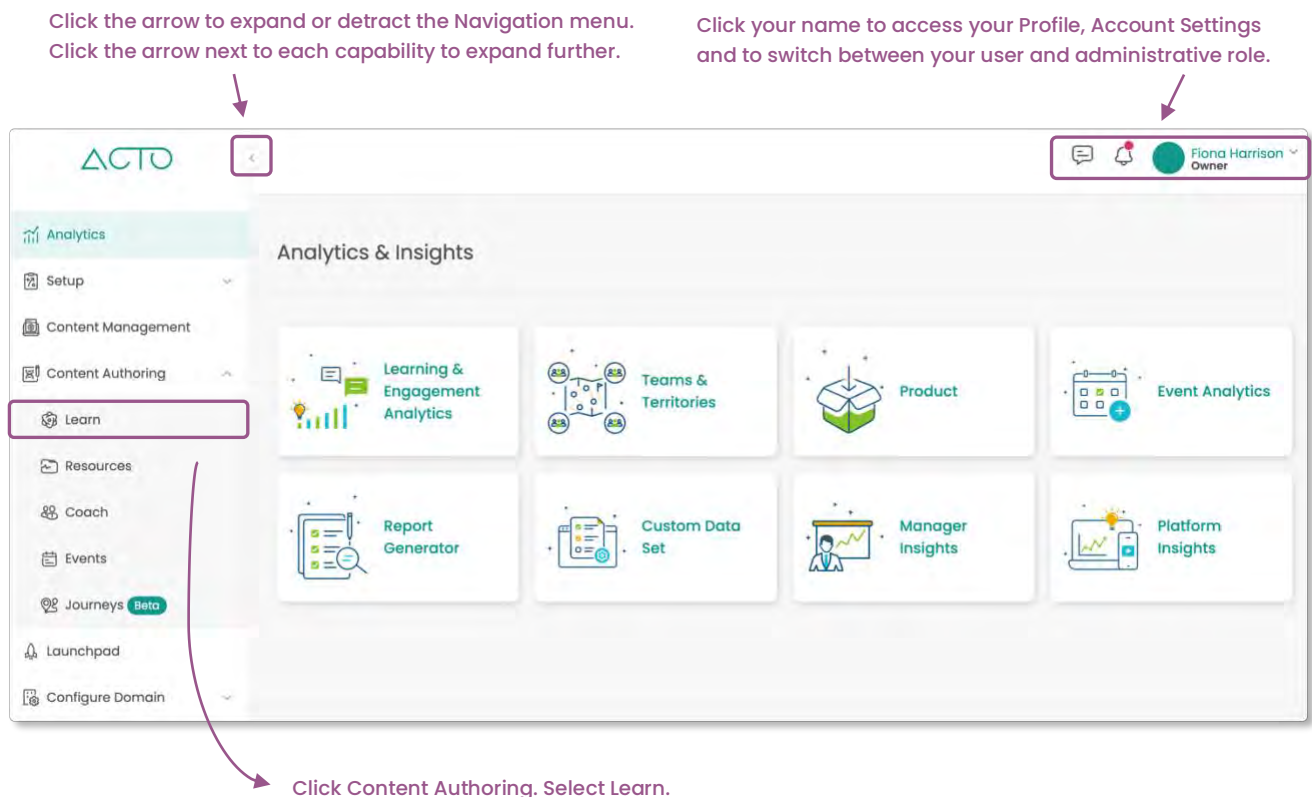
Learning Objectives

- How to navigate Learn
- How to create Categories, Learning Sets, and ActionPacks within Learn
- Understand the structure of an ActionPack including Topics and Lessons
- What types of resources can be added into ActionPacks

How to Access Learn

Owner and Admin roles can view and create training in Learn. Drafter, and Draft Manager roles can create training in **Learn**, and may only view training shared with them. Manager roles may view training shared with them. To learn more about default role permissions, please reference the **ACTO Default Role Permissions Table**.

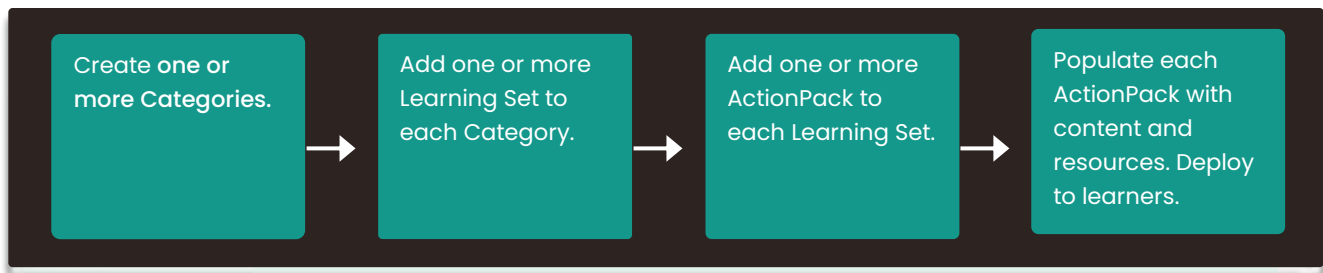
NOTE – The above references default role permissions. Permissions for different administrative roles can be updated or customized on a role-by-role or individual basis in ACTO's User Management System.



1. Log in to ACTO on your computer browser. Please use Google Chrome or Mozilla Firefox.
2. Make sure you are in administrative mode. End-users cannot access admin functionality.
3. Expand the Navigation menu on the left of your screen.
4. Click Content Authoring and then select Learn.

Learn Quick Overview

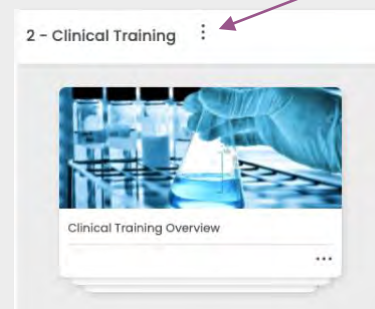
- Content on Learn is organized into **Categories**, **Learning Sets** and **ActionPacks**.
- A **Category** is a grouping of training content based on a classification, for example therapeutic area; product, clinical, or sales training; onboarding and more. **Categories** contain **Learning Sets**.
- A **Learning Set** is a 'folder' of training content that falls under a specific Category. **Learning Sets** contain one or more related microlearning modules called **ActionPacks**.
- **ActionPacks** are self-paced microlearning modules that contain engaging multimedia and resources.



How to Create a Category

1. Click **Content Authoring** from the Navigation menu. Select **Learn**.
2. Click the **Create** button on the top-right of the Learn homepage. Select **Category**.
3. Enter the Category name. Click **Create**.
4. To edit a Category name or delete the Category click **More options** on the top right of the Category.

The More Options menu can be accessed by clicking the ellipsis – the three dots.

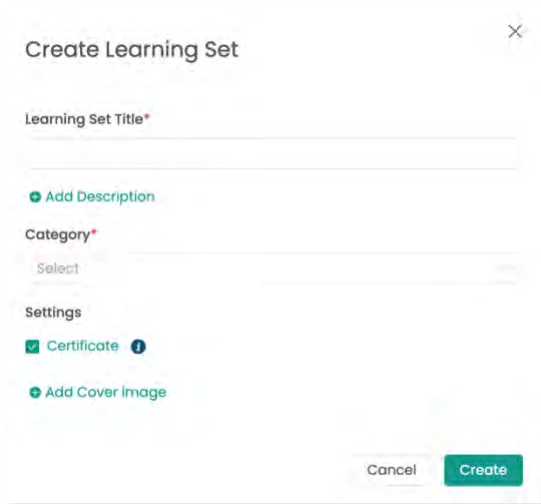


How to Create a Learning Set

A **Learning Set** is a folder within a **Category** that contains one or more training modules – **ActionPacks**.



To create a new Learning Set, click [Add New Learning Set](#) in the Category you want to add it to. You can also click [Create](#) on the top-right of the Learn homepage, and select [Learning Set](#) from the dropdown menu. When you create a new Learning Set, a wizard pops up on your screen to walk you through the process.

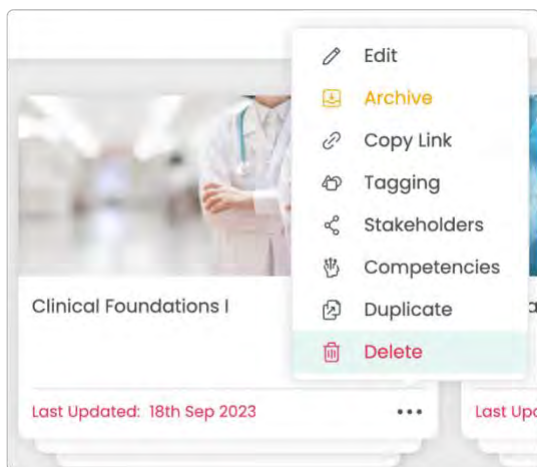


1. [Learning Set Title](#) – Enter a name for the Learning Set that clearly references the content it will contain.
2. [Add Description](#) – Add an optional description that learners will see.
3. [Category](#) – Select the Learning Set's Category.
4. [Settings](#) – Click Certificate if you would like end-users to receive a PDF certificate upon completion.
5. [Settings](#) – Expand [Add Cover Image](#) to upload a cover image for the Learning Set.
6. Click [Create](#) to complete.

PRO TIP When creating Learning Sets and ActionPacks in Learn, adding cover images adds an engaging visual element for learners. This also makes content more identifiable for platform admins.

How to Edit or Update a Learning Set

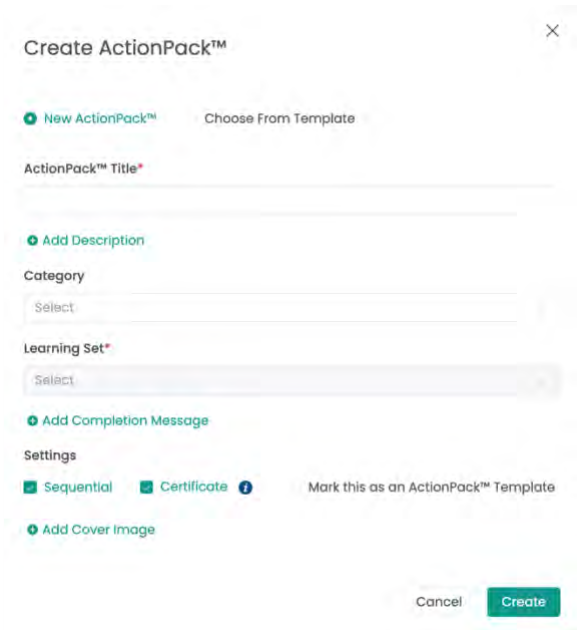
To make changes to a Learning Set click **More options** *** on the bottom right and select an action to take. Here you can edit, archive, tag, and delete the Learning Set, and take other actions as shared below.



- [Edit](#) – Click to change Learning Set details including title, description, Category, or cover image.
- [Archive](#) – Click to archive the Learning Set. It will still remain on the Learn homepage, but will be faded. You may unarchive a Learning Set using this same menu.
- [Copy Link](#) – Click to generate a shareable link. This can be shared with users already deployed the content.
- [Tagging](#) – Click to add existing tags to this content.
- [Stakeholders](#) – Click to add other administrative roles as collaborators. Set permissions for them.
- [Competencies](#) – Select the user role(s) this Learning Set is aimed at, and the relevant competencies.
- [Duplicate](#) – Click to duplicate the Learning Set. This allows you to rework existing content into a new format as needed without disrupting the original.

How to Create an ActionPack

To create a new micro-learning module – ActionPack – click **Create New ActionPack** in the Learning Set you want to add it to. You may also click **Create** on the top-right of the Learn homepage, and select **ActionPack** from the dropdown menu. **Before creating an ActionPack, create the Learning Set it will live in.**

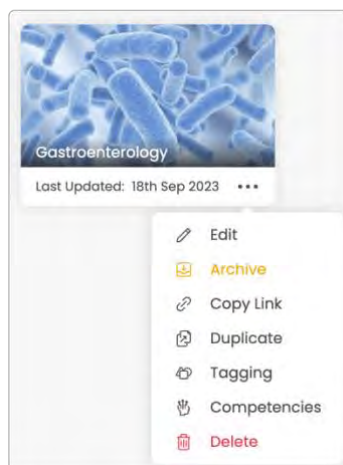


1. **ActionPack Title** – Enter a name for the ActionPack that clearly references its content.
2. **Add Description** – Add an optional description that learners will see.
3. **Category** – Select the ActionPack's Category.
4. **Learning Set** – Selection the Learning Set the ActionPack lives in.
5. **Completion Message** – Add an optional message end-users would receive upon completion.
6. **Settings** – Click **Sequential** if you would like end-users to access each Lesson in order. Click **Certificate** if you want end-users to receive a certificate upon completion. Click **Mark this as an ActionPack Template** to turn the ActionPack into a template.

PROTIP Templating an ActionPack allows you to create an ActionPack structure and format that you would like to reuse multiple times, without needing to recreate it from scratch every time.

How to Edit or Update an ActionPack

To make changes to an ActionPack click **More options** *** on the bottom right and select from the options menu. This allows you to edit, archive, tag, and delete the ActionPack, and take other actions as shared below.



- **Edit** – Click to edit or update ActionPack details.
- **Archive** – Click to archive the ActionPack. It will still remain in its Learning Set, but it will be faded. You may unarchive the ActionPack using this same menu.
- **Copy Link** – Click to generate a shareable link to share with users already deployed the content.
- **Duplicate** – Click to duplicate the ActionPack.
- **Tagging** – Click to apply existing tags to the content.
- **Competencies** – Select the user role(s) this ActionPack is aimed at, and select the relevant competencies.

Key Structural Elements in an ActionPack

- **Topic.** An ActionPack is broken down into two sections: **Topics** and **Lessons**. A **Topic** is a main section within the ActionPack. A **Lesson** is a sub-section within the Topic.
- **Lesson.** People learn better when accessing short and engaging content at their own pace. It is recommended to keep Lessons 5 to 7 minutes long, on average.
- **ActionPack Table of Contents.** On the left of an ActionPack is the Table of Contents. This allows administrators to add, delete, and reorder content, and add interactive **Forms** into the ActionPack. Putting this clear framework in place helps to structure and organize the module.

How to Add Topics and Lessons to an ActionPack

An ActionPack **Table of Contents** displays the Topics and Lessons in that ActionPack. Once the module's structure is created, content and resources can be easily plugged in to each Lesson.

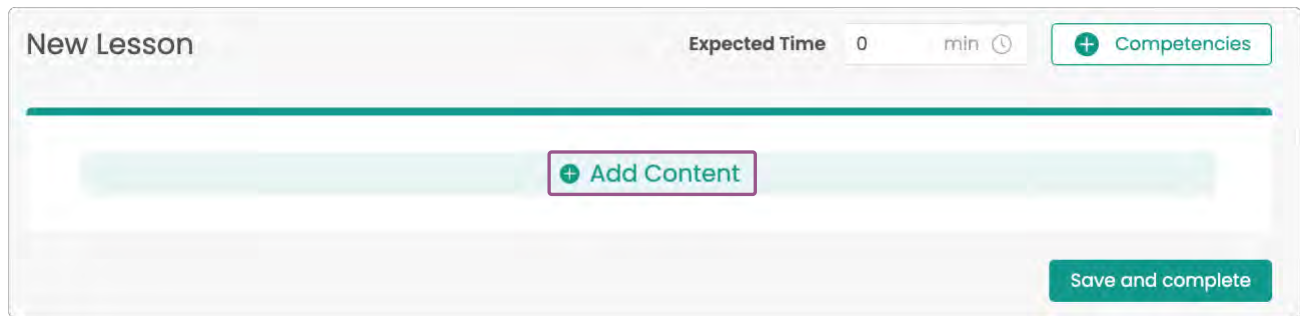


1. Click into an ActionPack from within its Learning Set.
2. To add a Topic to the ActionPack click **Add** from the ActionPack menu and select **Topic**. To add a Lesson to a Topic, click **Add New Lesson** beneath the Topic. Enter the Topic or Lesson name and then press the Enter key.
3. To add content into a specific Lesson, click into the Lesson. Then click **Add Content** and select from the provided options.
4. To reorder a Topics or Lesson, hover next to its name and **three vertical dots** will appear. Use them to drag and drop the Topic or Lesson to the desired location within the TOC.
5. To edit the name of a Topic or Lesson, or to delete it, hover over it and click the **Pencil icon** or the **Trashcan icon**.
6. To add a **Form** into an ActionPack click **Add** in the TOC and select the form. This pulls up forms that were previously created in Content Management. Forms are interactive resources like **Quizzes, Polls, Surveys, and Digital Signatures**.

PROTIP On the end-user side, the ActionPack Table of Contents guides the learner through the module and provides them with an outline of what to expect as their training module progresses.

How to Add Content into a Lesson

A Lesson is a short training segment within a Topic. A Topic can contain multiple Lessons. Lessons provide end-users with learning objectives and engaging resources aimed at meeting those objectives.



- Click into the Lesson you would like to add content into. Click [Add Content](#). Select the resource you would like to add. Once you have entered all the content in a Lesson please click [Save and Complete](#).

When you build out a Lesson, you can also enter the Expected Time. This allows you to add the time frame in which you expect users to go through the Lesson and provide them with an understanding of how long each Lesson should take to complete.

What are the Available Resource Types?

The following types of resources may be added into a Lesson when you select the [Add Content](#) button. Please note – **only Actions, Protips, and Descriptions are created directly within a Lesson**. Other resource types must be uploaded or created in **Content Management** and then pulled into the ActionPack.

Action – Text that provides users with context on how to engage with the resources provided to them.

Protip – Text that provides users key information like subject matter expert insight, statistics, definitions, or tips on how to use the provided resources.

Description – A formattable text box for content that may not fit into existing resource types.

Image – Images files. May include product, technical, clinical, marketing and other image types.

Video – There are three video types:

- Video** – Existing videos (e.g., product or training, agency produced videos; webinars).
- Recorded Video** – Self-recorded videos created on the platform using a webcam.
- Screen Capture** – Self-recorded video of your screen (e.g., application, document, browser window) while adding a talk track over it.

YouTube – Embedded YouTube videos.

Checklist – Important information that is broken down, highlighted, or reiterated in the form of a checklist. Checklists in an ActionPack will show up in line, meaning that end-users will not need to click in to expand the checklist.

Document – Uploaded documents relevant to the training and easily accessible to learners.

URL – A URL web link.

Audio – Uploaded audio files e.g., podcasts.

Clinical Paper – Uploaded clinical papers.

SCORM – SCORM files.

Virtual Meeting Link – Provide learners with a quick URL link, and optional description, to an upcoming virtual meeting.

What are Forms?

Forms are interactive resources that can be added to ActionPacks. Forms are added **before or after a Lesson**. Forms are resources created within **Content Management** and may be re-used across different ActionPacks. The following Forms are available for ActionPacks: Quiz, Survey, Poll, and Digital Signature.



Quiz – Quizzes assess learner retention. Quizzes can be formatted in Single Choice, Multiple Choice, Matching, True or False.

Survey – Surveys ask users to respond to feedback or survey questions.

Poll – Polls ask users to respond to a poll.

Digital Signature – Digital Signatures ask users to sign off by hand or cursor. This provides a record that may be used to attain user acknowledgement, or to sign off on training completion.

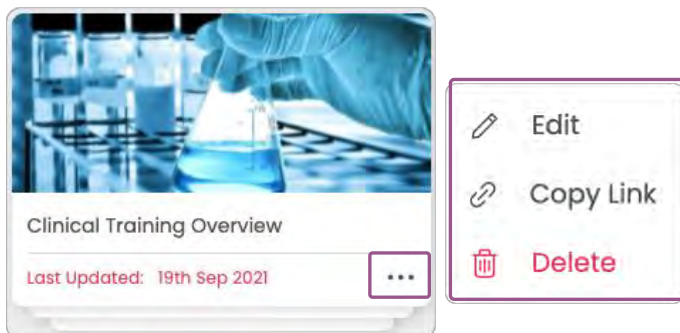
How to Make an ActionPack a Template

Templatizing an ActionPack allows you to create and reuse the structure and format of a ActionPack (new or existing) as many times as you need without recreating it from scratch every time.

- To make a new ActionPack into a template, select **Mark this as an ActionPack Template** in an ActionPack wizard when you are creating the ActionPack. You may then select the template you created whenever you create a new ActionPack.
- To make an existing ActionPack a template, click back into the ActionPack wizard (by selecting **Edit** from an ActionPack's **More Options** menu). Select **Mark this as an ActionPack Template** in the wizard.

How to Generate Shareable Links in Learn

Shareable links are direct links to content that has already been deployed to end-users. Sharing a link to a specific Learning Set or ActionPack allows recipients to directly access the shared content. In Learn, shareable links may be generated for **Learning Sets and ActionPacks**.

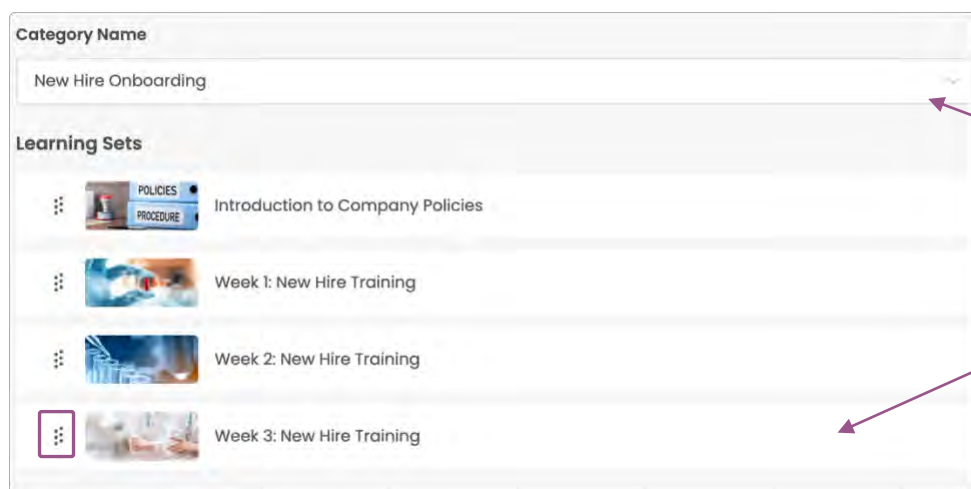


Navigate to the Learning Set or ActionPack you would like the link for. Click the **More Options** menu and select **Copy Link**. Then click Copy. You may then share this URL link.

Please note, the link recipient(s) must already be deployed this content.

How to Rearrange Content in Learn

On the Learn homepage, you may reorder Learning Sets, and ActionPacks within Learning Sets. Click the **Rearrange** button on the top-right of Learn and select **Learning Set** or **ActionPack**.



1. Click the dropdown menu to select the Category or Learning Set in which you want to rearrange content.

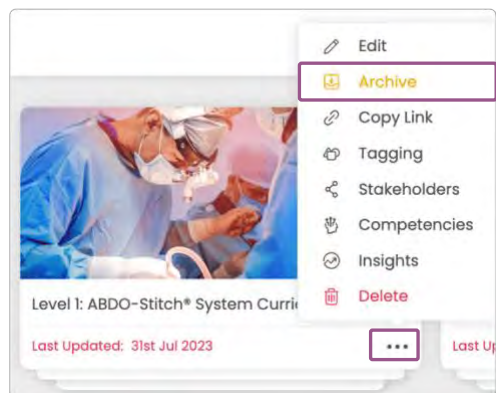
2. Click and drag six dots to where you would like to reposition the content.

Protip When you archive Learning Sets or ActionPacks they are greyed out. If you don't want to see them in their original position, you can rearrange the content so that active content is front and center.

How do you rearrange Categories? You can rearrange Categories by renaming them. You may either number them in the order you would like (1, 2, 3...), or they will be listed in alphabetical order by default.

How to Archive Learning Sets and ActionPacks

You may archive Learning Sets and ActionPacks that are no longer in use. **Please note, you will still see this content in Learn, however it will be greyed out to indicate it is archived.** Please follow the same steps if you would like to unarchive previously archived content.

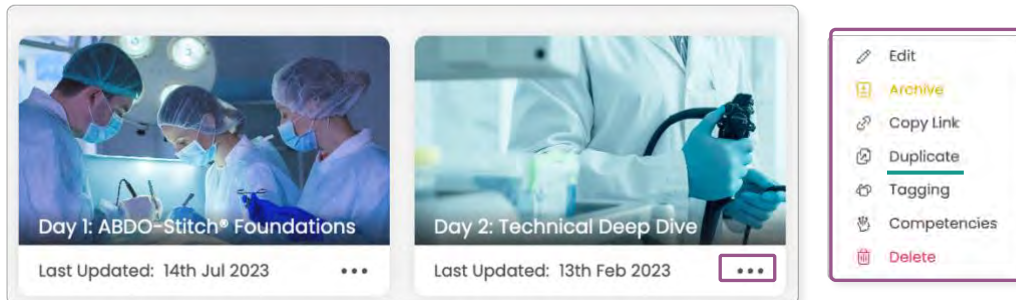


2. Click Archive.

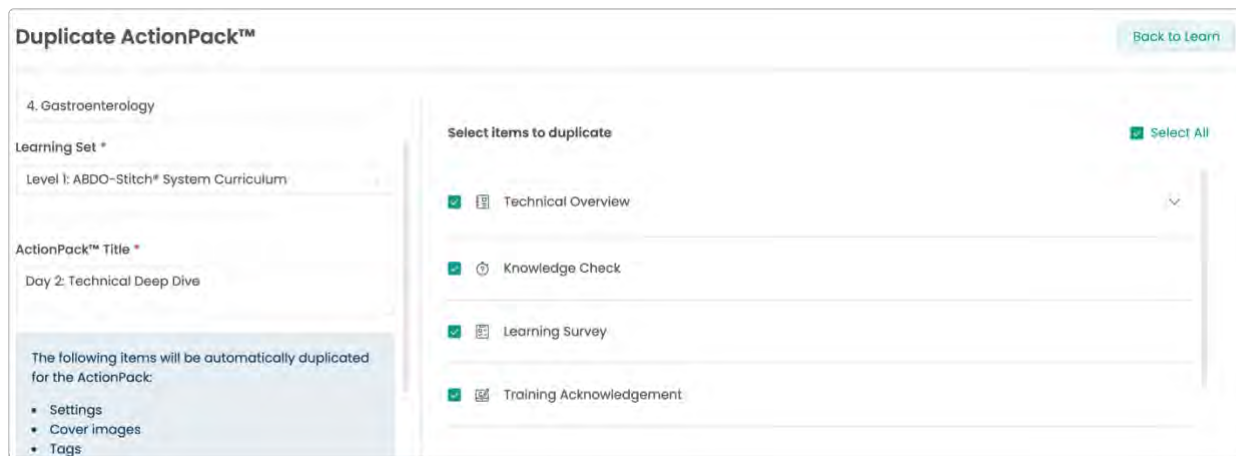
1. Click **More Options** on the bottom right of a Learning Set or ActionPack to view the options menu. Select **Archive**.

How to Duplicate Learning Sets and ActionPacks

You may duplicate Learning Sets and ActionPacks in Learn. This allows you to leverage and update built-out content without disrupting existing deployments, or needing to recreate the content. To get started, select the training content you would like to duplicate, and click into the More options menu. Select **Duplicate**.

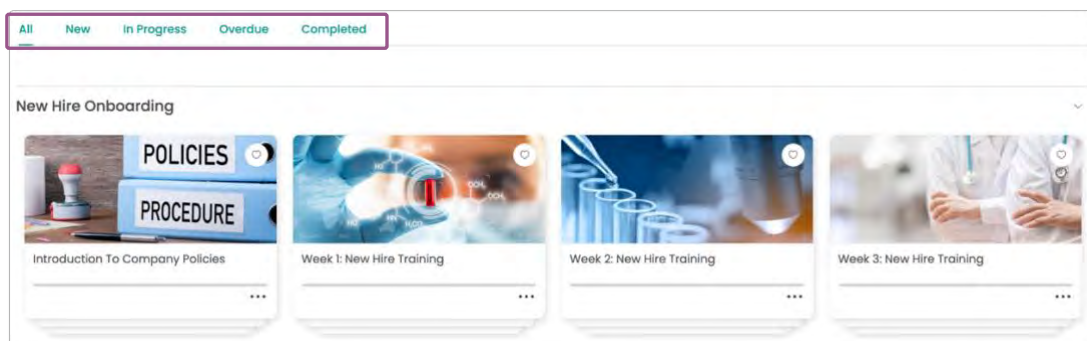


When you duplicate an ActionPack, you may select exactly which Lessons and Topics to duplicate. When you duplicate a Learning Set, you may select exactly which ActionPacks, Lessons, and Topics to duplicate.

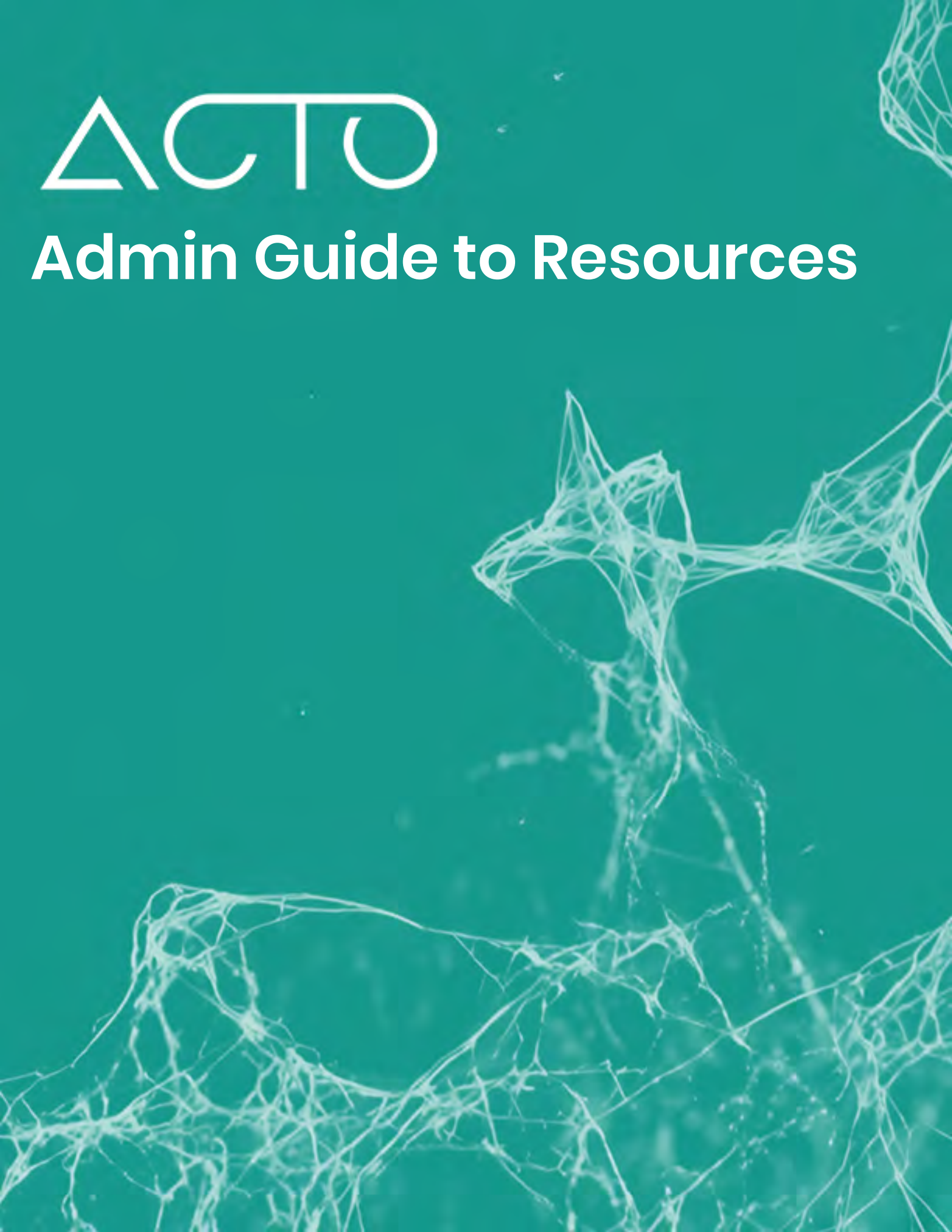


How does an End-User View Deployed Content in Learn?

Learning Sets deployed to end-users in Learn are organized for ease of access. End-users can navigate through the following tabs to access their learning: **All**, **New**, **In Progress**, **Overdue**, and **Completed**.



[Click back to Admin Guide to Learn Table of Contents](#)

The background is a solid teal color. Overlaid on this background are several white spider webs. One web is in the top right corner, another is in the middle right, and a large, dense web is in the bottom left and center. The webs are made of thin, white, tangled lines.

ACTO

Admin Guide to Resources



Admin Guide to Resources

The **Resources** capability on ACTO allows platform administrators to organize resources into folders called **Collections** and deploy these Collections to their teams. **Resources** gives end-users quick access to approved training, sales, marketing, and clinical content. Resources may be leveraged for pre-call prep, to quickly refresh on messaging, to understand how to speak to a particular piece of content and much more.

Click into any of the links below to get started.

Table of Contents

1. [Learning Objectives](#)
2. [How to Access Resources](#)
3. [Resources Quick Overview](#)
4. [Resources Workflow](#)
5. [How to Create a Collection – Quick Guide](#)
6. [How to Create a Collection – Details](#)
7. [How to Add Resources to a Collection](#)
8. [How to Copy Resources into Multiple Collections](#)
9. [How to Move Collections](#)
10. [How to View Recent Activity in Resources](#)
11. [How to Deploy Collections](#)
12. [How to Generate Shareable Links for Resources](#) or Collections
13. [What is Offline Mode for Resources?](#)

Admin Guide to Resources

Learning Objectives

- How to navigate the Resources tool.
- How to create Collections.
- How to add resources into Collections.
- How to deploy Collections to end-users.

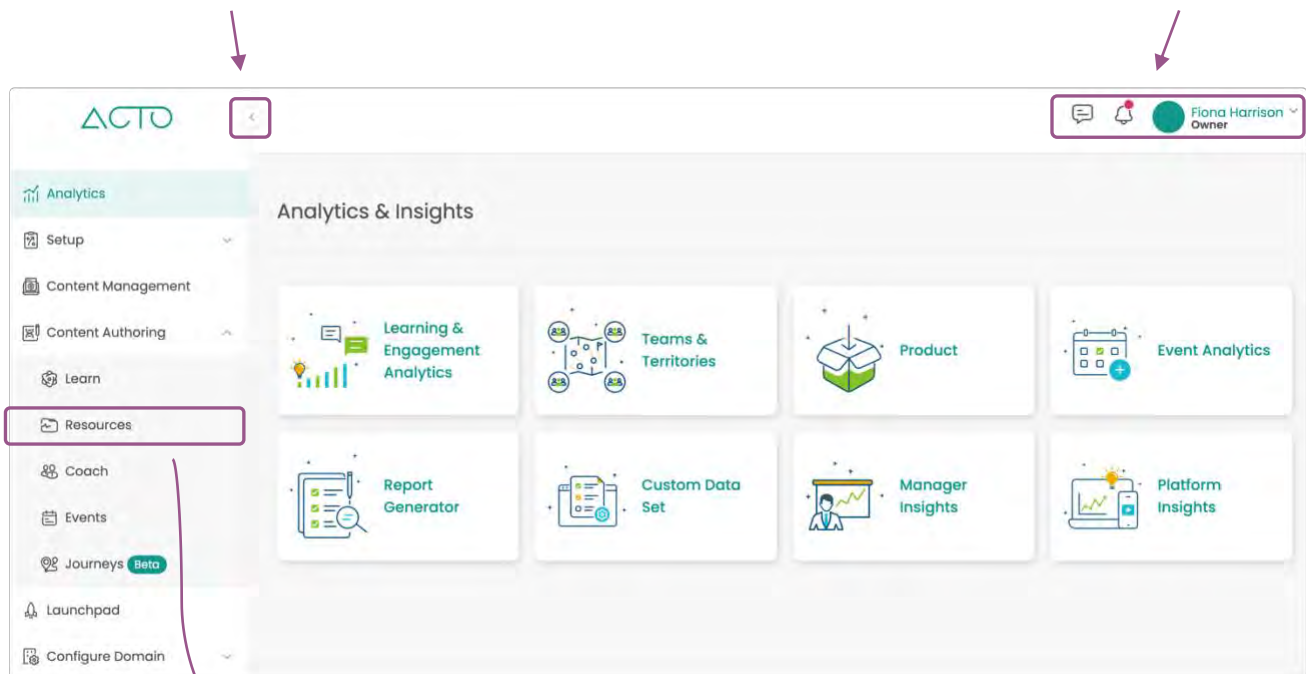
How to Access Resources

Admin roles can create Collections and view all Collections. **Drafter** and **Draft Manager** roles can create Collections and view Collections shared with them. **Manager** roles can view Collections shared with them.

NOTE – The above references default role permissions. Permissions for different administrative roles can be updated or customized on a role-by-role or on an individual basis in ACTO's User Management System.

Click the arrow to expand or detract the Navigation menu.
Click the arrow next to each capability to expand further

Click your name to access Settings and to
Switch Role between Admin and User mode.



Click Content Authoring. Select Resources

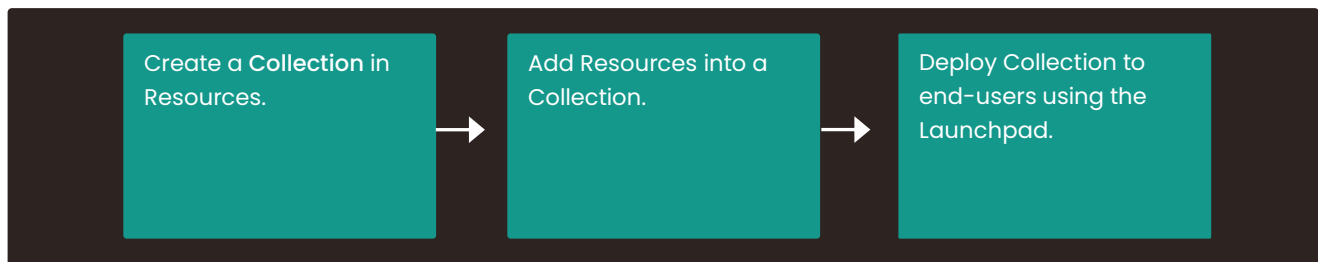
1. Log in to ACTO on your computer browser. Please use Google Chrome or Mozilla Firefox.
2. Make sure you are in administrative mode. End-users cannot access admin functionality.
3. Expand the Navigation menu on the left of your screen.
4. Click Content Authoring and then select Resources.

Resources Quick Overview

- Admins organize approved resources into **Collections** of folders and deploy these Collections to users.
- Resource Collections can be organized around a product, theme, subject, training type, and more.
- Collections can be leveraged by end-users in the field for pre-call prep, to quickly refresh on product messaging, to understand how to speak to specific collateral, or to easily reference training content.
- End-users may add preapproved resources from a Collection to customer call presentations.
- Collections are created in the Resources tool and deployed to users using Launchpad.

Resources Workflow

A Collection is a folder of resource curated by platform Admins and Managers for end-users to quickly and easily access and reference.



How to Create a Collection - Quick Guide

A Collection is a folder of resources curated by platform Admins and Managers for end-users to quickly and easily access and reference.

The icons on the top-right allow you to sort Collections by Name, Date or Recently Edited; view recent activity, or use filters to navigate and search through Collections.

The screenshot shows the 'Resources' interface. At the top, there are two tabs: 'My Collections' and 'Shared With Me'. Below the tabs, there is a 'Create New Collection' button with a plus icon. To the right of this button are several collection cards, each with a thumbnail image and a title: 'Brochures & Job Aids', 'Clinical Resources', 'Diabetes Home Study', 'Home Study', and 'Marketing Resources'. Each card also shows when it was last updated. On the top right of the interface, there are icons for sorting, filtering, and searching. Annotations with arrows point to these elements: 'Click My Collections to view the Collections you create. Click Shared with me to view the Collections that have been shared with you.' points to the tabs; 'Click Create New Collection to create a Collection' points to the plus icon; 'Click More Options to take actions with Collections. This includes Editing, Tagging, Adding Stakeholders and Competencies, Moving, Copying, Archiving or' points to the top-right icons.

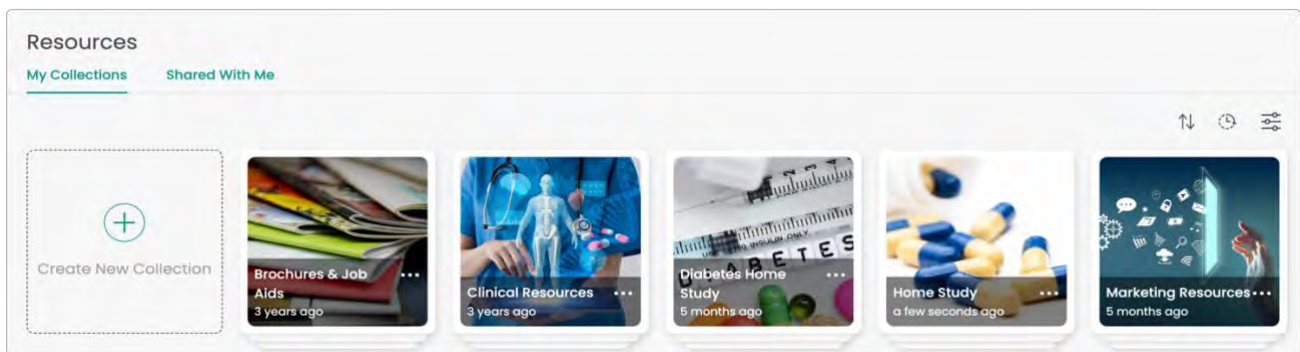
Click My Collections to view the Collections you create. Click Shared with me to view the Collections that have been shared with you.

Click Create New Collection to create a Collection

Click More Options to take actions with Collections. This includes Editing, Tagging, Adding Stakeholders and Competencies, Moving, Copying, Archiving or

How to Create a Collection – Details

Create a new Collection in Resources. Collections can be organized numerically (1,2,3...) or alphabetically. If you are using both, numerical Collections precede alphabetical Collections.



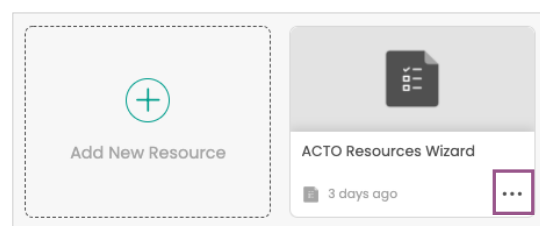
1. Click **Content Authoring** from the Side Navigation menu. Select **Resources**.
2. Click **Create New Collection**. Add details into the Collection wizard. Enter the Collection name and description. Upload a cover image to make the Collection visually engaging. Click **Create**.
3. Once you have created a Collection, you can add **Tags**, **Stakeholders**, and **Competencies** as well as take additional actions (see box on the right).
4. Click **More Options** *** on the side of any Collection to see what actions you can take.

- **Edit** – Click to edit the Collection's details.
- **Tagging** – Select or add tags to the Collection.
- **Stakeholders** – Add other administrators who can update or delete the Collection.
- **Competencies** – Select competencies the Collection's recipients will be measured on.
- **Move** – Move the Collection to another Collection or sub-Collection.
- **Copy** – Duplicate the Collection. Select its location.
- **Copy Link** – Copy the Collection URL.
- **Archive** – Archive the Collection.
- **Delete** – Delete the Collection.

How to Add Resources to a Collection

Resources added to Collections are pulled from resources that have already been uploaded, organized, and tagged in **Content Management**.

1. Click into a Collection. Click **Add Resources** in an empty Collection. Click **Add New Resource** in a Collection which already contains some resources. Select the resource to be added from **Content Management** and click **Add**.
2. To add a sub-Collection to a Collection, click **Add New Collection** inside an existing Collection.

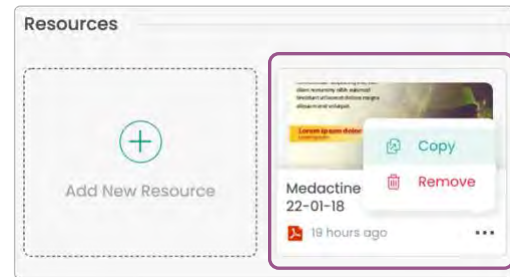


PROTIP To delete a resource click the More Options menu. Select **Delete**.

How to Copy Resources into Multiple Collections

You may wish to house the same resource in multiple Collections. To achieve this quickly and efficiently please follow the instructions below.

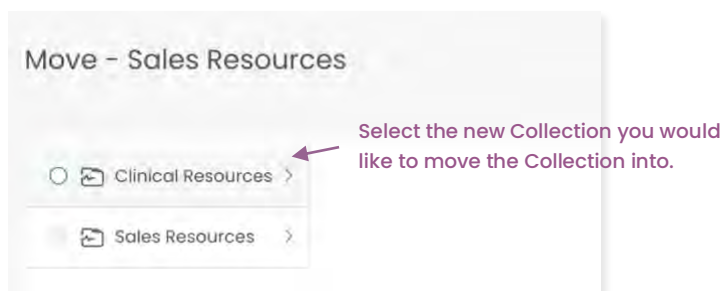
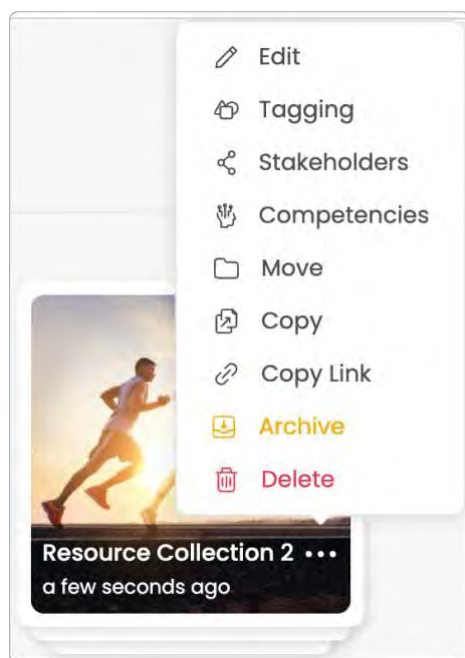
1. Click into [Resources](#). Click into a Collection and find the resource you would like to copy.
2. Click into More Options *** on the bottom right of the resource tile. Select [Copy](#).
3. Select the Collection(s) you would like to add the resource to. Click [Copy Here](#). If you delete the resource from one Collection, it will not be deleted from other Collections it's in.



PROTIP Resources are not the only thing you can copy. You can also click the More Options on a Collection itself, and duplicate the whole folder into one or more Collections.

How to Move Collections

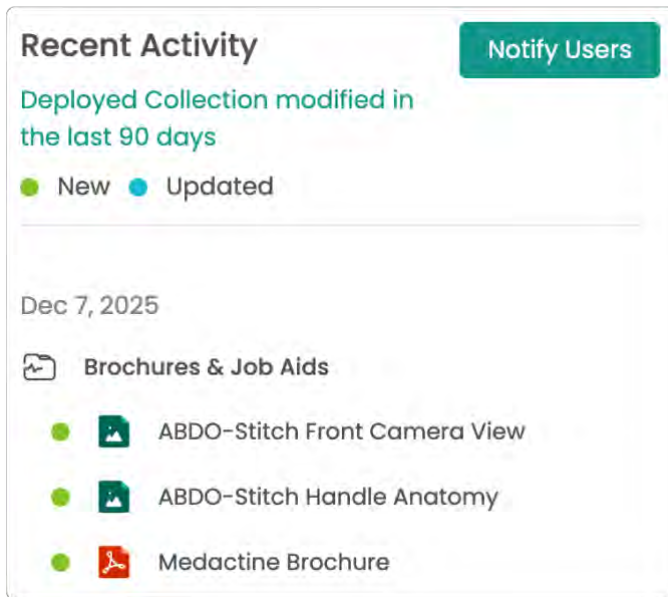
You may move and reorder Collections within the Resources into other Collections or sub-Collections. **PLEASE NOTE, once you move a Collection out of the main Resources section it can only be moved in and out of other Collections. Currently, you will not be able to move a Collection back to the main Resources section.**



1. Click into [Resources](#). Find the Collection that you would like to move.
2. Click More Options *** on the bottom right of the Collection tile and select [Move](#).
3. Select the Collection or sub-Collection you would like to move the Collection into. Click [Move Here](#).

How to View Recent Activity in Resources

The Recent Activity feature allows you to keep track of changes to deployed Collections over the last 90 days.



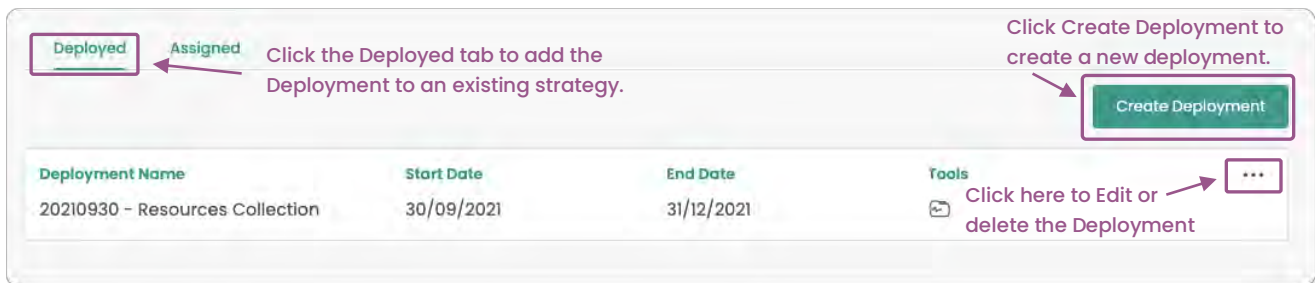
Click the **Recent Activity** icon on the top-right of the main Resources page. This icon looks like a clock.

Recent Activity will show you changes to deployed Collections over the last 90 days. When new resources are added to deployed Collections, or existing resource versions are updated in the CMS, this will list the date, Collection, and resource name.

To send users notifications around changes to their Resource Collections, click **Notify Users**. In the **Resource Notification Center**, you can select an updated Collection, Notification type, and users from a list the Collection is deployed to. You can then send an email, in-app, or push notification – or all three – to selected users.

How to Deploy Collections

Collections must be deployed to end-users using the Launchpad.

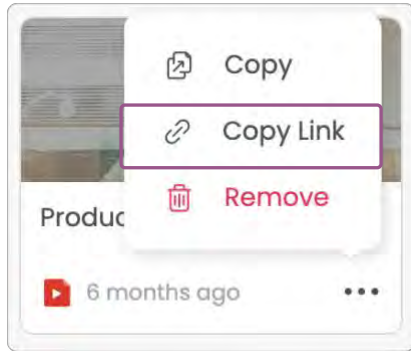


1. Click **Launchpad** from the Side Navigation menu.
2. Create a new strategy by clicking the **Launch New Strategy** button or click into an existing strategy and deploy the Collection from there.
3. On the Strategy page click **Deploy**. Select **Resources**.
4. Enter details into the Resources wizard.

- **Essentials** – Enter the Collection name and a start and end date for the deployment.
- **Resources** – Select a Collection to add. Select a deployment date and time to schedule the deployment. If you do not schedule it, it will deploy immediately.
- **Audience** – Select Teams or individual users to deploy the Collection to.

How to Generate Shareable Links for Resources or Collections

Shareable links are direct links to content that has already been deployed to end-users. Sharing a link to a specific resource allows recipients to directly access the shared content. In the Resources tool, shareable links may be generated for Collections and individual resources.

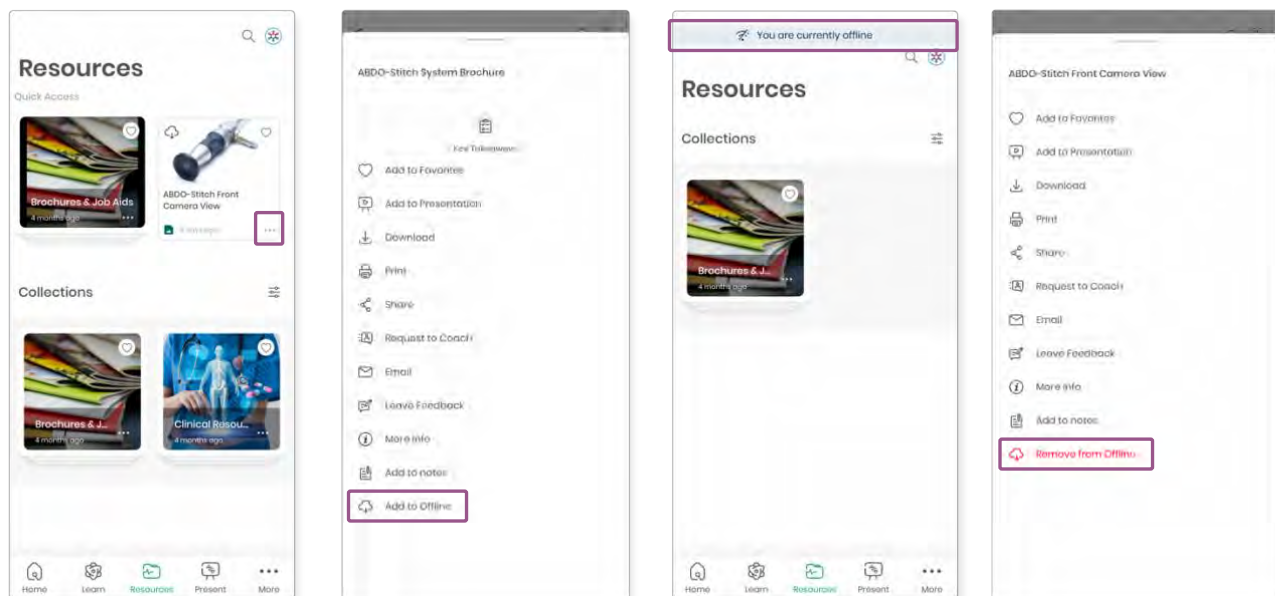


1. Click **Content Authoring** from the Navigation menu. Select **Resources**.
2. Navigate to the Collection or Resource you would like to copy. Click the More icon and select **Copy Link**. Then click Copy. You may then share this URL link. Please note, the link recipient(s) must already be deployed this content.

What is Offline Mode for Resources?

Offline mode enables end-users to save Collections and individual resources to their device for offline access. If this feature is enabled on your platform, users will be able to access all their resources and Collections offline.

The screenshots below share what putting a resource in offline mode looks like from the user mobile view.

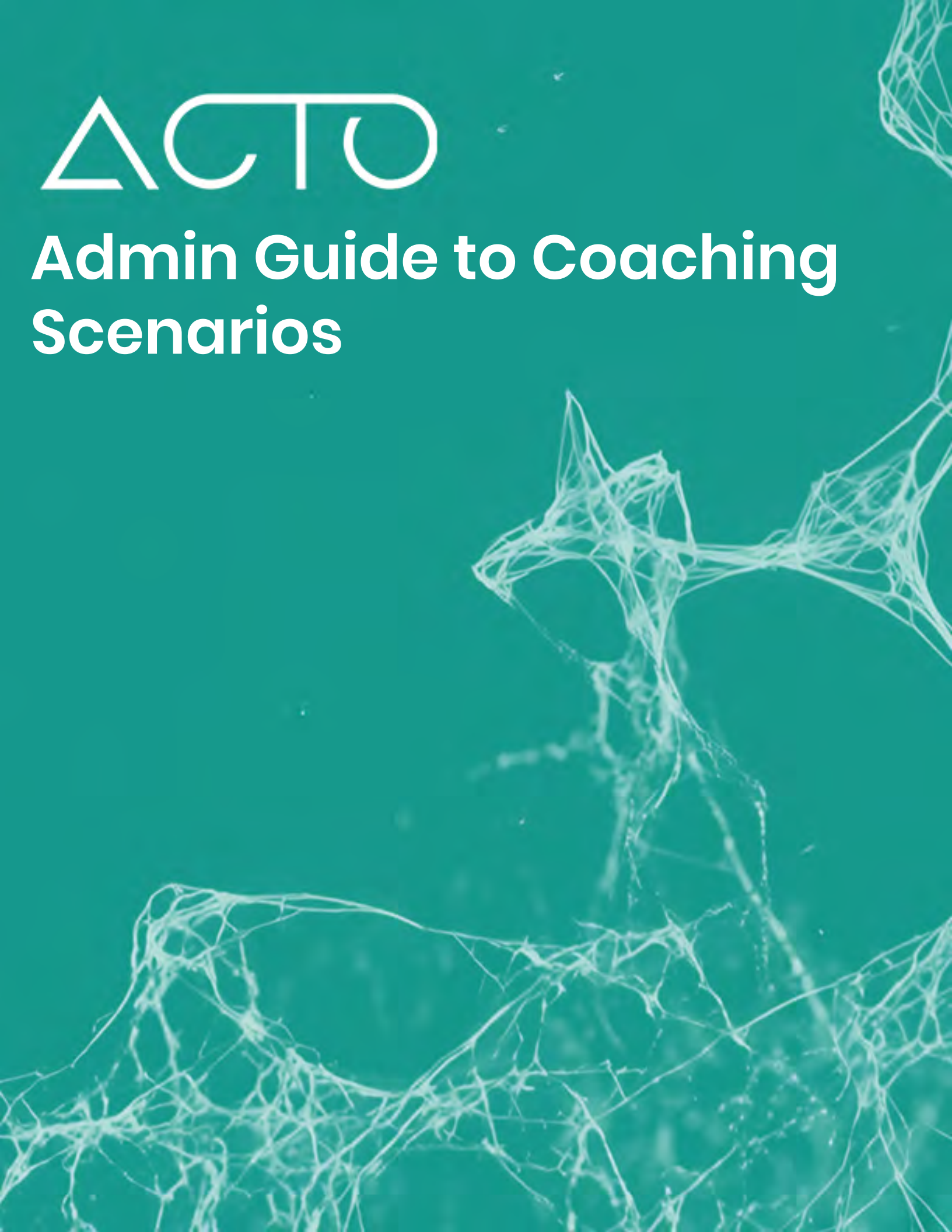


Once this feature is enabled on a domain, admins do not need to adjust permissions on a resource or Collection basis. All resources and Collections will be available for users to set up for offline access.

[Click back to Admin Guide to Resources Table of Contents](#)



Admin Guide to Coaching Scenarios





Admin Guide to Coaching Scenarios

The Coach capability on **ACTO** allows platform administrators to remotely coach and engage field teams and drive pull-through from training events using virtual role-play Scenarios. Scenarios are created and deployed to sharpen a team's skillset, from product knowledge to sales messaging, communication, and more.

Click into any of the links below to get started.

Table of Contents

1. [Learning Objectives](#)
2. [How to Access Coach](#)
3. [Scenarios Quick Overview](#)
4. [How to Create a Scenario Workflow](#)
5. [How to Create a Scenario Quick Guide](#)
6. [How to Create an Evaluation Form](#)
7. [How to Add Details to a Scenario](#)
8. [How to Assign a Scenario](#)
9. [Manager Guide to Coaching Scenarios](#)
10. [How to Deploy a Scenario – Image Guide](#)
11. [How to Deploy a Scenario – Text Instructions](#)
12. [How to Review a Scenario](#)



Admin Guide to Coaching Scenarios

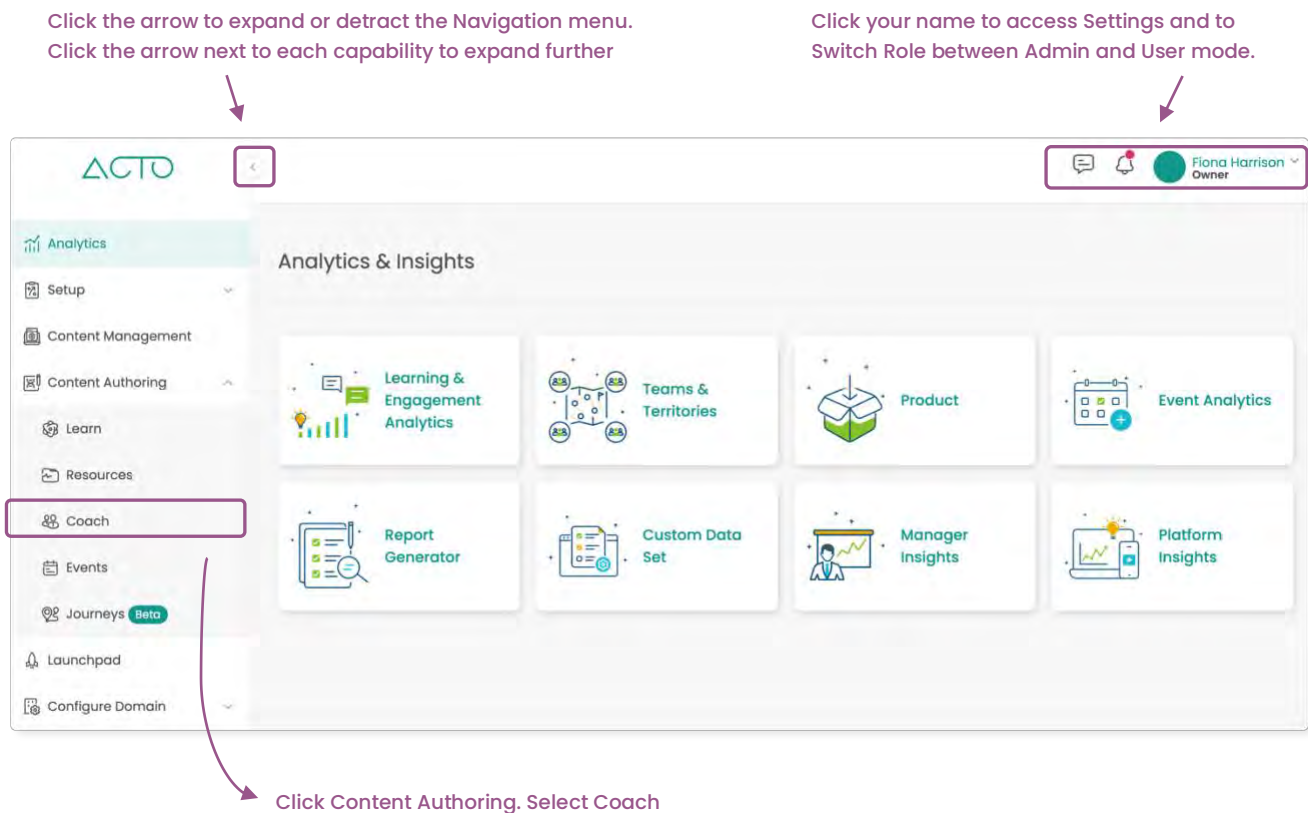
Learning Objectives

- Understand how to access the administrative side of Coach.
- Understand how to create, assign, and deploy Coaching Scenarios.
- Understand how to create and use Evaluation Forms.

How to Access Coach

Admin, Manager, and Draft Manager roles on ACTO can access Coaching Scenarios. The Admin has full permissions to create, view, assign, and deploy. Managers and Drafters have varying permission levels.

NOTE – The above references default role permissions. Permissions for different administrative roles can be updated or customized on a role-by-role or on an individual basis in ACTO's User Management System.



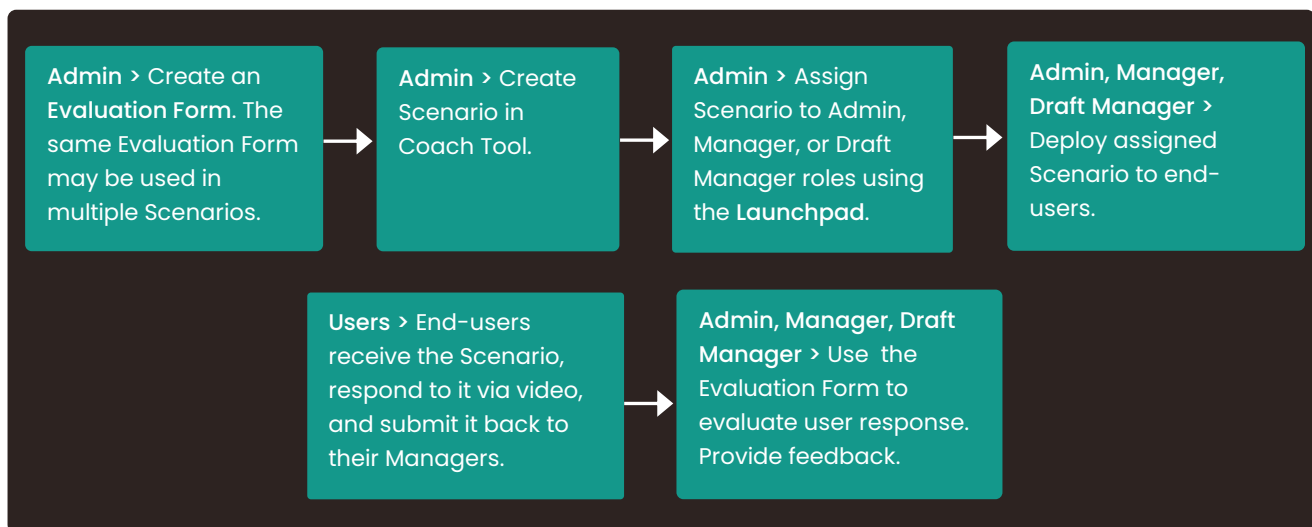
1. Log in to ACTO on your computer browser. Please use Google Chrome or Mozilla Firefox.
2. Make sure you are in administrative mode. End-users cannot access admin functionality.
3. Expand the Navigation menu on the left of your screen.
4. Click Content Authoring and then select Coach.

Scenarios Quick Overview

- Administrative roles use **Coach** to engage in two-way virtual coaching conversations with end-users.
- A **Scenario** is a situation around which a *coaching opportunity* or *conversation* can be initiated. Scenarios can be based on how well learners speak to sales messaging, clinical efficacy, and more.
- Scenarios contain **Evaluation Forms** that Managers use to evaluate their team members. Evaluation Forms are created in **Forms**. Scenarios are created in **Coach** and assigned to Managers and Mentors via the **Launchpad**. Managers are then able to push the Scenario out to end-users.

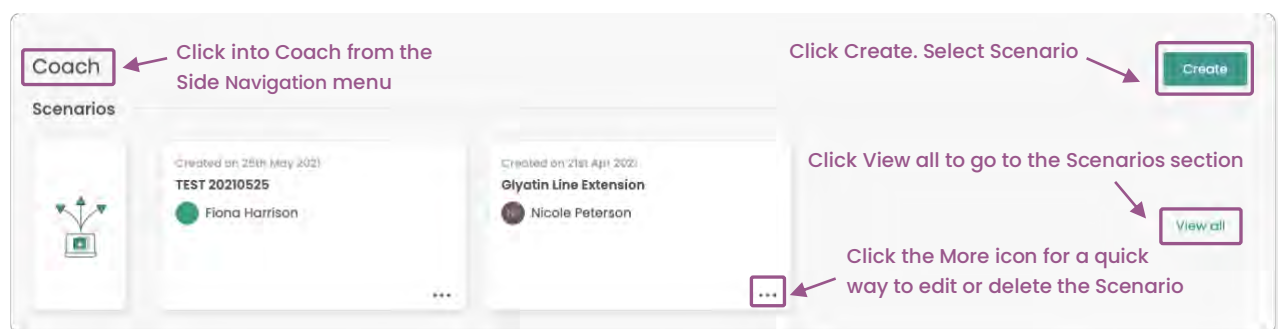
How to Create a Scenario Workflow

NOTE – If you have already created the **Evaluation Form** you will be using within a Scenario, then you do not need to recreate a new one in the **Forms** tool. The same Evaluation Form can be reused across Scenarios.



How to Create a Scenario Quick Guide

Scenarios provide end-users specific situations around which to engage in virtual conversations or roleplay with **Managers** or **Mentors**. Scenarios are created by platform Admins who provide context around how to complete the Scenario – including text or video instructions and resources like **Learning Sets** or **Collections**.



How to Create an Evaluation Form

Each Coaching Scenario has an Evaluation Form in it. This Form is created by the Admin role. When other administrators are assigned a Scenario, they will use the Evaluation Form to assess the end-user's response.

The screenshot shows the 'Question I' configuration interface. Annotations include:

- Mandatory** and **Visible** toggle switches. Annotation: 'Select Mandatory if evaluators must respond to the question. Select Visible to have the question visible to end-'.
- Save** button. Annotation: 'Save upon completion.'
- Choose Field Type** dropdown menu showing 'Single Choice'. Annotation: 'Click the dropdown to select a question'.
- Add Option** button. Annotation: 'Click to add another Answer option.'
- Evaluation Description** text area. Annotation: 'Click to add an Evaluation Description for each answer.'
- Add Question** button. Annotation: 'Click to add another Evaluation question.'

1. Click into **Content Management** from the Side Navigation menu. Select the folder you would like to add the form into. Click **Add New** on the top right of the page, click Forms, and select the **Evaluation** tile within Forms.
2. Enter the Evaluation name, description, and an expiry date if applicable.
3. Select a question type. Please reference **Evaluation Form question types** on the right.
4. Click **Preview** to view the Form the way a user would. Click **Delete** to delete it.

- **Single Choice** – The evaluator selects the most appropriate response from provided options.
- **Multiple Choice** – The evaluator selects all appropriate responses from provided options.
- **Rating** – The evaluator rates the user's response from one to five stars. Add a description of each star rating to clearly define what it means.
- **Comments** – A text field where evaluators can enter text in response to a specific question.

When you create an Evaluation Form, note the **Evaluation Description** section under each question. This allows you to create a rubric defining each answer option, and provide detailed evaluation criteria.

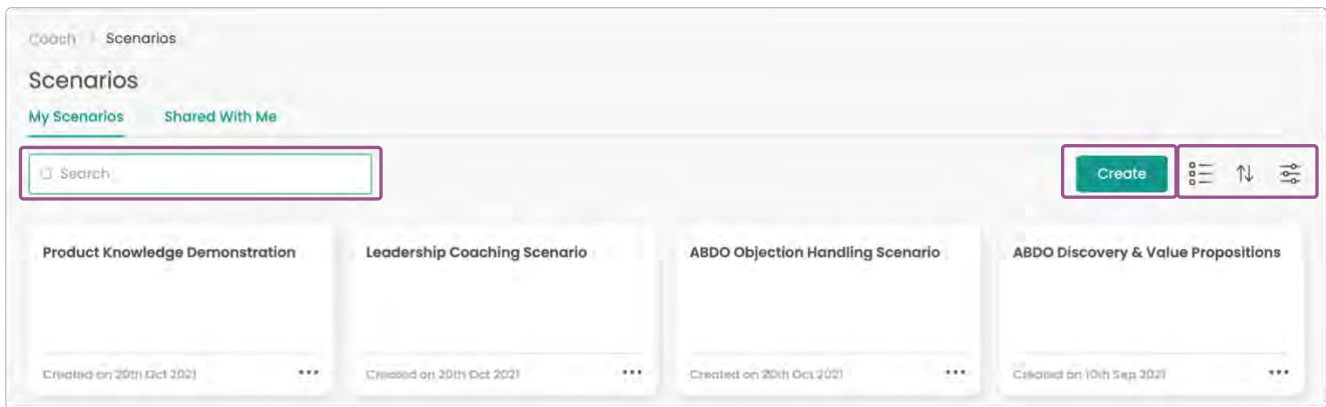
3 stars

Select 3 stars if the team member is able to speak to some elements of product knowledge in a satisfactory manner but needs improvement in other areas.

152/500

How to Add Details to a Scenario

Once you have created an Evaluation Form, and are ready to add details to a Scenario, proceed to Coach and begin to create a Scenario using the Scenario wizard.



1. Click into **Coach** from the Side Navigation menu. Click **Create** on the top-right of the page and select **Scenario**. You may also click **View All** next to Scenarios to navigate to the Scenario section, and create a new Scenario there.
2. Enter the **Scenario Name** and an optional description in the Scenario wizard. Select the **Evaluation Form** you already created in **Content Management**. Click **Create** to save. **Once you create a Scenario, click into it to add the details listed on the right.**

PROTIP In the Scenario section, you may use the Search bar or filter to find the Scenario you need. You can also view Scenarios in a list view, or sort by name, date, or most recently created.

- **Instructional Video** – Add an optional instructional video providing users with context, instructions, or examples of what good looks like.
- **Pework** – Add Learning Sets and Collections to the Scenario to as prework.
- **Handouts** – Add additional support or training resources for learners to reference.
- **Tagging** – Select or add relevant tags.
- **Competencies** – Select the user type the Scenario will be deployed to and select competencies they will be assessed on.
- **Stakeholders** – Add collaborators, other administrators who can update / delete the Scenario based on the permissions you set.

How to Assign a Scenario

For Managers to deploy a Scenario to end-users, Admins must first assign it to them using the **Launchpad**. Please note the difference between **assigning** and **deploying** a Scenario. **A Scenario is assigned to Managers and Mentors using the Launchpad. Managers and Mentors deploy the assigned Scenario to end-users.**

What is a Mentor? A Mentor is another Admin, Manager, or Draft Manager who has visibility into the Scenario and the end-user's response to it. Mentors are added to Scenarios by the administrator deploying the Scenario to end-users. A Mentor may evaluate end-users and approve Scenarios.



1. Click **Launchpad** from the Side Navigation menu.
2. Create a new strategy by clicking the **Launch New Strategy** button or click into an existing strategy and assign the Scenario from there.
3. On the Strategy page click **Assign**. Then select the **Scenario** option. If assigning a Scenario to an already created Strategy, select the **Assigned** tab under the Strategy and click **Create Assignment**.
4. Enter details into the Scenario wizard.

- **Essentials** – Enter the Scenario name and its start and end date (required).
- **Scenario** – Add one or more Scenarios. If you add an assignment date, this schedules the Scenario assignment. If you leave this field blank, the Scenario is immediately assigned.
- **Notifications** – Set the Scenario Notification settings and customize the email if applicable.
- **Proctors** – Select your Proctors i.e., the Manager or Admins who will deploy the Scenario to users.

NOTE – Even the Admin Assigning the Scenario will need to add themselves as a Proctor to be able to deploy it to end-users.

[Click back to Admin Guide to Coaching Scenarios Table of Contents](#)

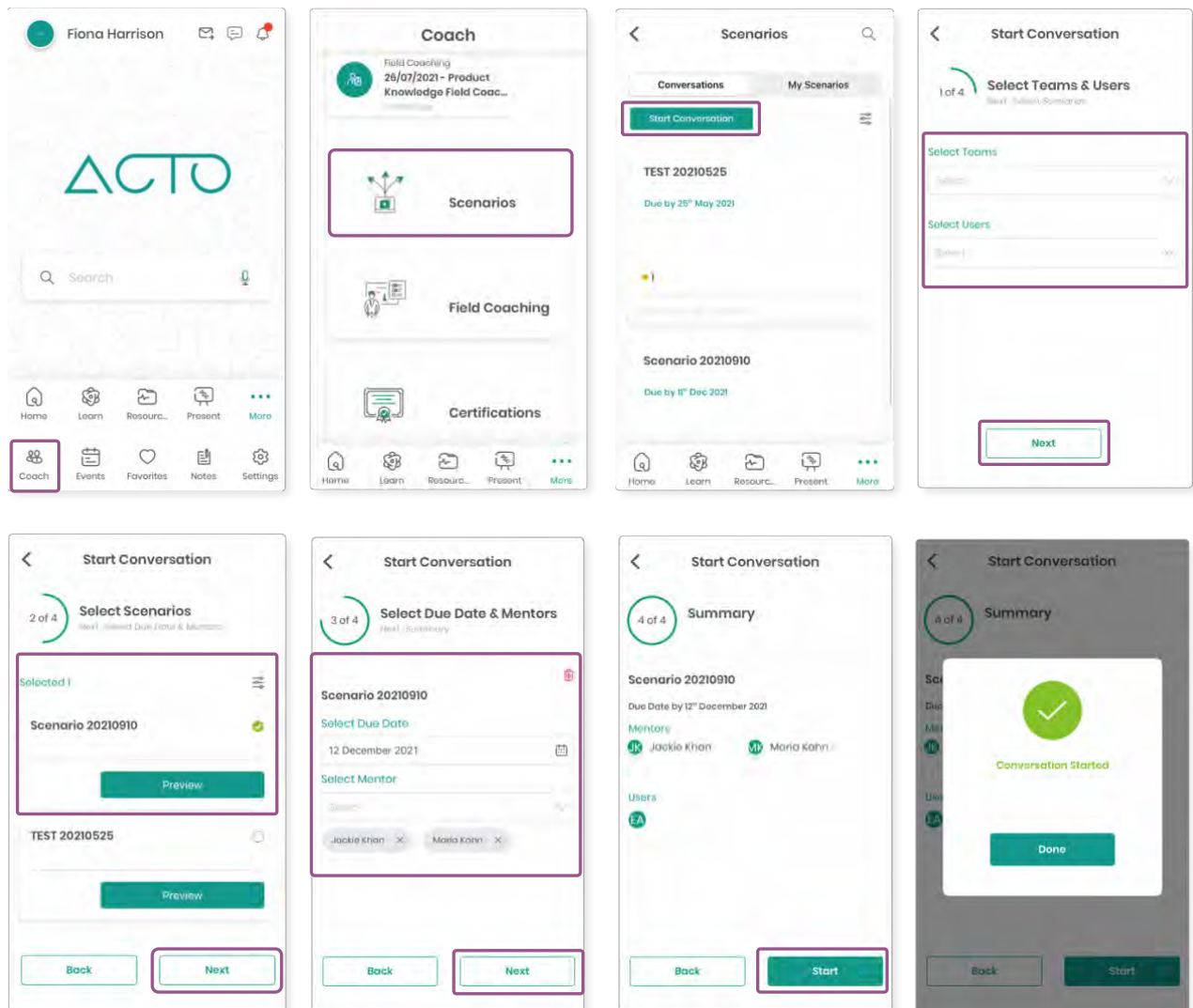


Manager Guide to Coaching Scenarios

Use ACTO's Coach tool to engage in **two-way virtual coaching conversations** with your teams. Platform Administrators create Coaching Scenarios and assign them to Managers. **A Scenario is a situation around which a coaching opportunity or conversation can be initiated.** Once a Manager is assigned a Scenario, they deploy it out to end-users, and then review and assess user responses using the Scenario's Evaluation Form.

How to Deploy a Scenario – Image Guide

Many administrative features on ACTO are accessible only on the web version of the platform. **The Coach tool is an exception. Managers must switch to User mode on web – or use a mobile device – to deploy coaching to users.** Please refer to the image guides below to walk through deploying a Scenario on a mobile device.



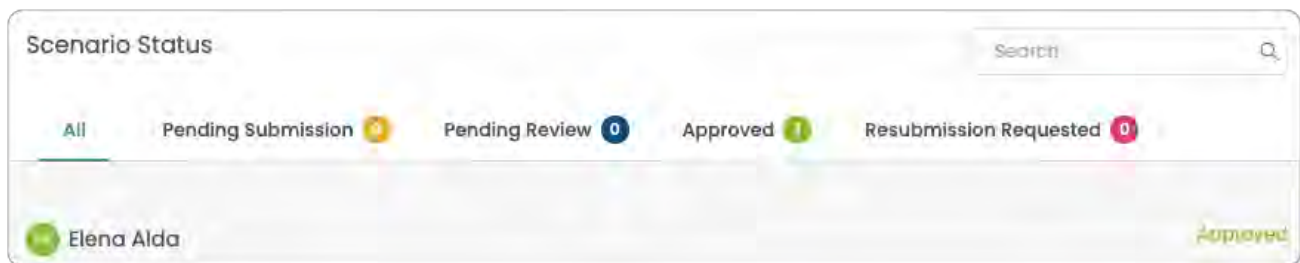
How to Deploy a Scenario – Text Instructions

1. Click into the Coach tool.
2. Click **Scenarios**. Click **Conversations** to view the Scenarios assigned to you. The **My Scenarios** tab houses Scenarios deployed to you as a user. To start a new deployment, click **Start Conversation**.
3. Select the teams or individual users you would like to deploy the Scenario to. Click **Next**.
4. Select the Scenario(s) you would like to deploy. You may click **Preview** to view the resources attached to the Scenario. Click **Next**.
5. Select a due date for the Scenario and a Mentor, if applicable. Click **Next**.
6. Review a summary of the Scenario deployment. Click **Start**. Then click **Done**.

Who is a Mentor? A Mentor is simply another Admin role who has visibility into the Scenario and the end-user's response to it. Mentors are added to Scenarios by the administrator/manager deploying the Scenario. The Mentor may also be tasked with evaluating and approving the Scenario.

How to Review a Scenario

Once a Scenario has been deployed, the deploying Manager or any Mentors can view the status of the Scenario, assess and approve the user's submission and provide feedback, or require resubmission. This may be completed on a mobile device, or on a web browser in User Mode.



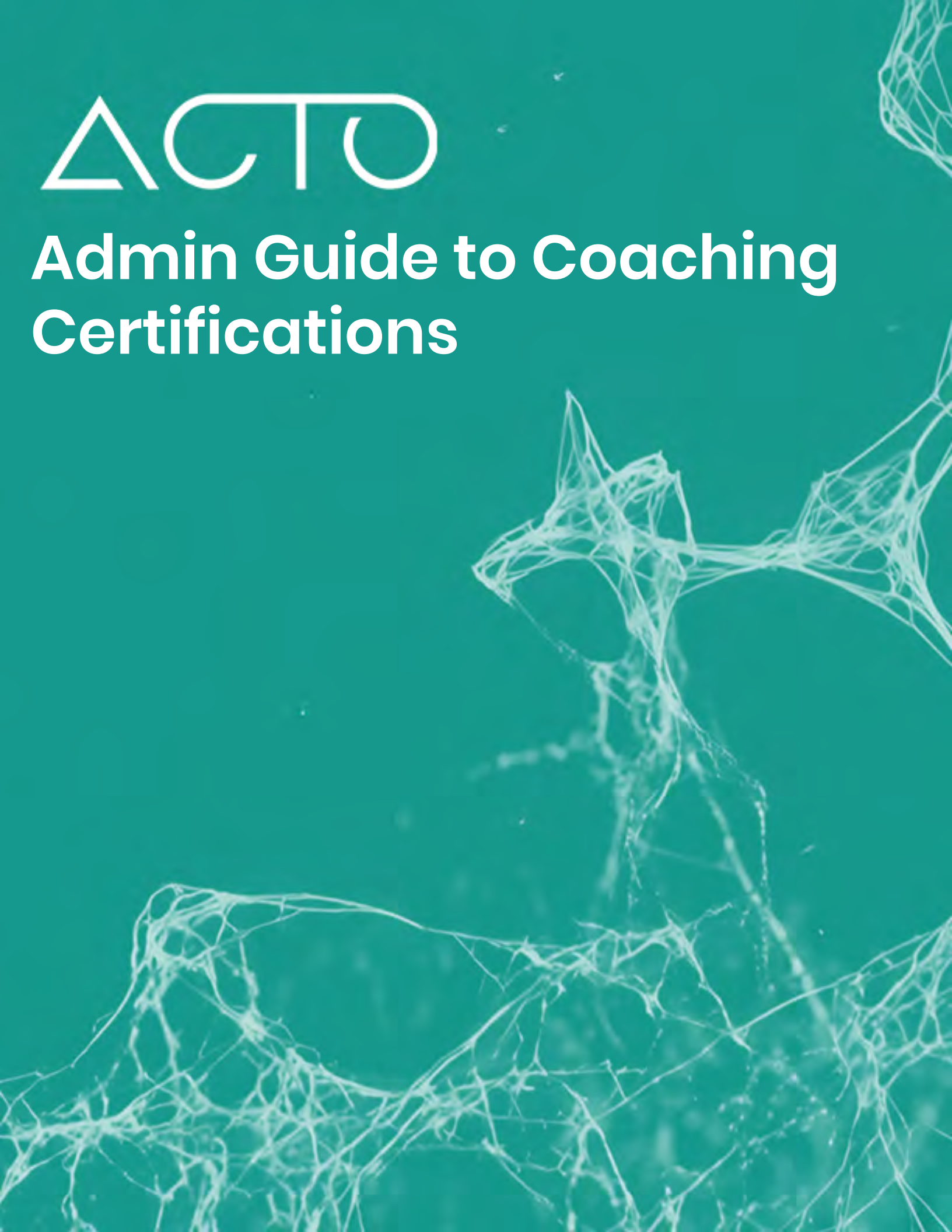
1. If using a web browser, click your name on the top-right of the screen, select **Switch Role – User**. Then navigate to Coach.
2. Click into **Scenarios**. Then click into a specific Scenario under the **Conversations** tab.
3. To review a submitted response, click the **Pending Review** Section. Select a specific user's name to view their response. Click the video tile to view their video. Click Pending Review once again, and fill out the evaluation questions. You may approve the Scenario, or require the user to resubmit.

- ① **Pending Submission** – The user has not yet submitted a response.
- ② **Pending Review** – The user's response has not been reviewed.
- ③ **Approved** – The response has been viewed and approved.
- ④ **Resubmission Required** – The response has been reviewed, and the user is required to resubmit a response.

[Click back to Admin Guide to Coaching Scenarios Table of Contents](#)



Admin Guide to Coaching Certifications





Admin Guide to Coaching Certifications

Certifications on ACTO allow you to certify your teams based on structured assessments you create on the platform. ACTO allows you to create **Assessment Forms**, add them into Certifications, and assign Certifications to Managers who use them to certify their teams. Learners can be certified on use cases ranging from new hire onboarding to product training and more.

Click into any of the links below to get started.

Table of Contents

1. [Learning Objectives](#)
2. [How to Access Coach](#)
3. [Certifications Quick Overview](#)
4. [How to Create a Certification Workflow](#)
5. [How to Create a Certification Quick Guide](#)
6. [How to Create an Assessment Form](#)
7. [How to Add Details to a Certification](#)
8. [How to Assign a Certification](#)
9. [Certification FAQs](#)
10. [Manager Guide to Coaching Certifications](#)
11. [How to Certify an End-User](#)
12. [Quick Guide to Certifications – Text Only](#)



Admin Guide to Coaching Certifications

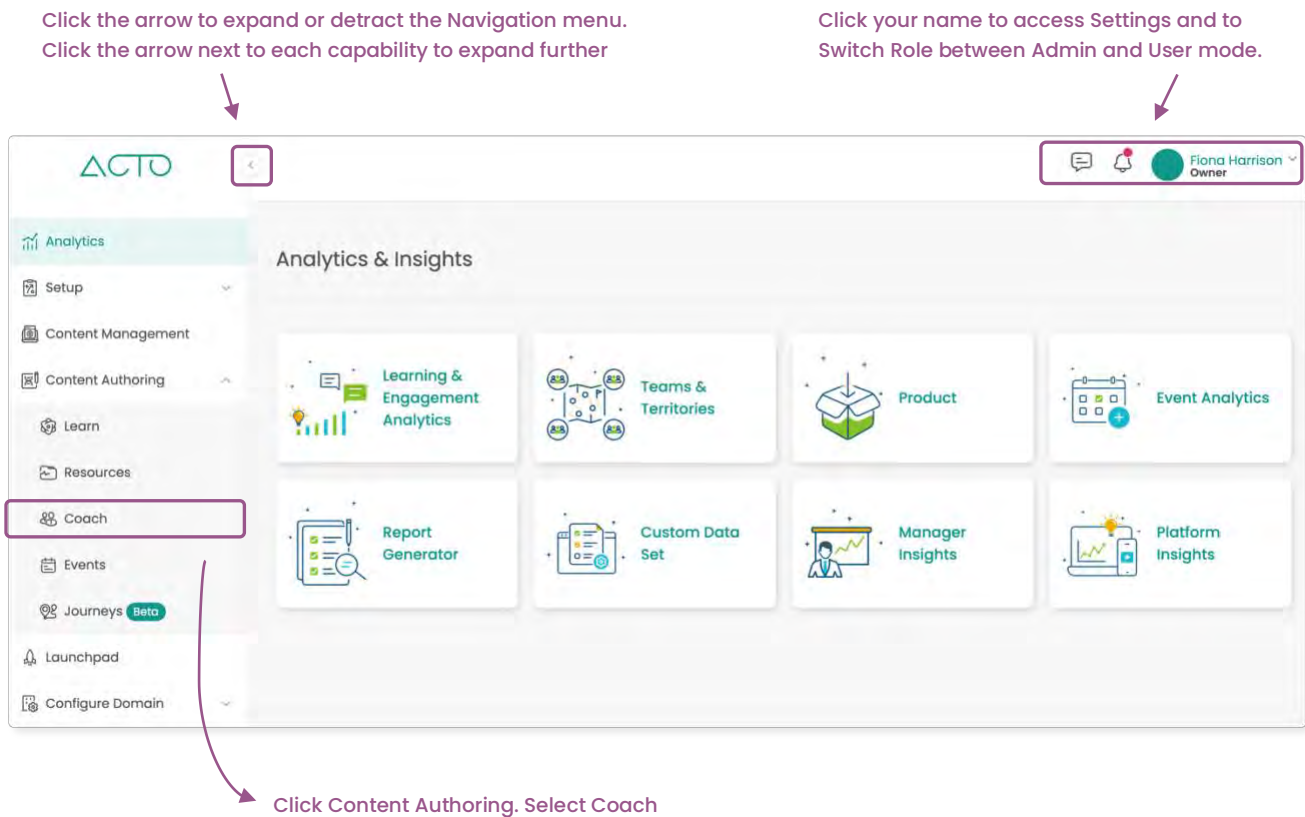
Learning Objectives

- Understand how to create an Assessment Form using Forms.
- Understand how to create Certifications within the Coach tool.
- Understand how to assign Certifications to Managers and other Administrators.
- Understand how to certify your team members.

How to Access Coach

Admin, Manager, and Draft Manager roles on ACTO can access Coaching Certifications. Admins have full permissions, and Managers can Certify Users. Other Administrative roles can view Certifications.

NOTE – The above references default role permissions. Permissions for different administrative roles can be updated or customized on a role-by-role or on an individual basis in ACTO's User Management System.



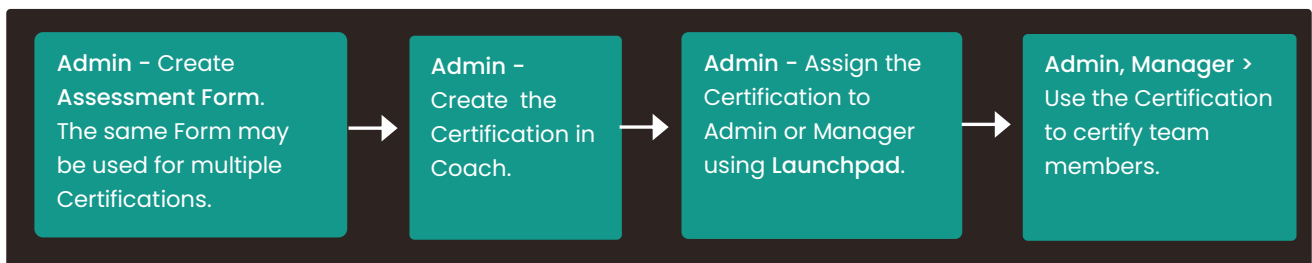
1. Log in to ACTO on your computer browser. Please use Google Chrome or Mozilla Firefox.
2. Make sure you are in administrative mode. End-users cannot access admin functionality.
3. Expand the Navigation menu on the left of your screen.
4. Click Content Authoring and then select Coach.

Certifications Quick Overview

- Administrative roles use **Certifications** to certify their teams.
- **Certifications** can be used to assess and certify that users have completed organizational requirements from new hire training and onboarding to ongoing training.
- Certifications contain **Assessment Forms** that Managers use to assess their teams. Assessment Forms are created using **Forms**. Certifications are created in **Coach** and assigned to Managers via the **Launchpad**. Managers are then able to use the assigned Certification to certify end-users.

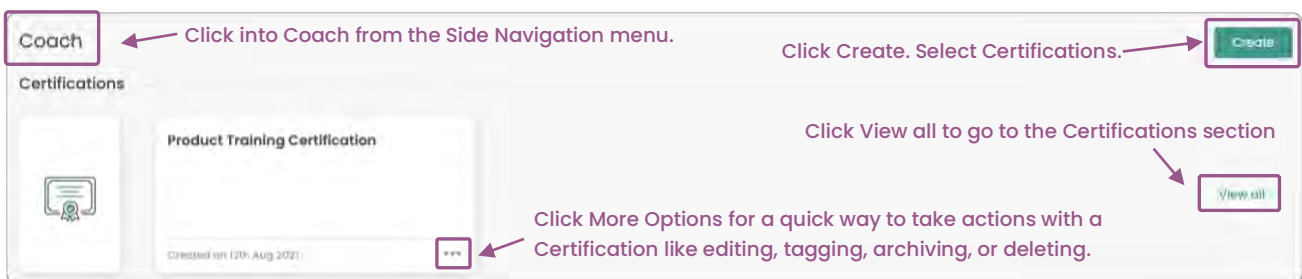
How to Create a Certification Workflow

NOTE – If you have already created the **Assessment Form** you will be using within a **Certification**, you do not need to recreate a new one in the **Forms** tool. The same **Form** can be reused across **Certifications**.



How to Create a Certification Quick Guide

Certifications allow you to certify your team members around specific training and compliance use cases like **new hire onboarding, new product training, ongoing training, and more**. **Certifications** are created by platform Admins who provide Managers with context around how to assess and certify end-users.



What if a team member does not pass a Certification the first time?

If a team member does not pass their **Certification** the first time, they may be recertified if the Admin who created the **Certification** has set the number of allowable attempts to more than one.

How to Create an Assessment Form

Each Certification must have an Assessment Form attached to it. This Assessment form provides a rubric that guides Managers certifying their team members.

To get started, select **Content Management** from the Navigation menu. Click into the folder you would like to house the form in. Click **Add New** and select **Form**. Within the Forms pop up click the **Assessment** tab. Enter the **Assessment Name**, **Description** (Optional), **Instructions**, and an **Expiry Date** (Optional). Click **Create**.

Question Type	Question 1	Points
Single Choice	Rep was able to effectively discuss the product while using marketing-approved material to supplement the discussion in a "show and tell" method.	3

Settings
Question Display
☐ All-in-One View
Display all sections and questions at once.
☒ Section View
Display one section at a time.
Points
Total Points Allocated: 11
Passing Criteria: 8

1. On the right side of the Assessment screen, notice the **Settings** box. Here you set Question Display preferences to All-in-One-View or Section View, and set the Passing Criteria for the Assessment.
2. Add a **Name** and **Details** (Optional) for each Section of the Assessment. Then add questions by clicking **Add Question** and selecting a question type. Add answer options, and allocate each one with points.
3. Notice the toggles under each question. Select **Mandatory** if Managers must respond to the question. Select **Visible** to have the question visible to end-users. Select **Allow Comments** to allow Managers to add additional commentary or feedback related to the question.

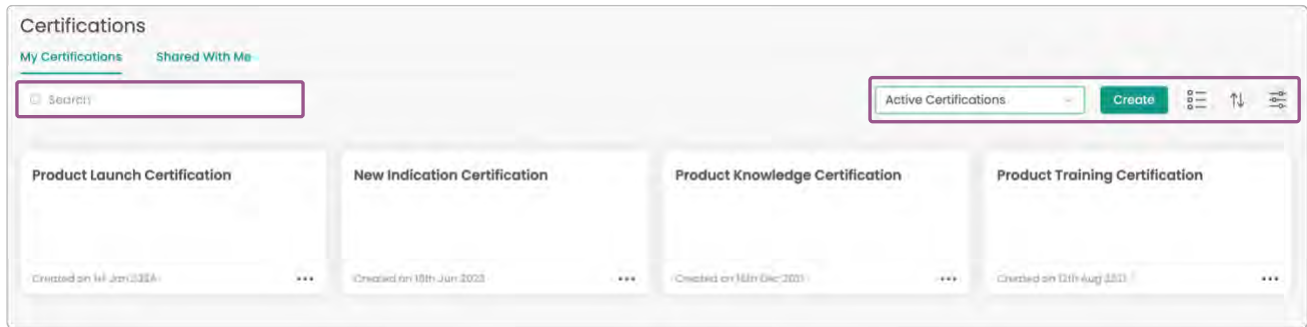
- **Single Choice** – The Manager selects the most appropriate response from provided options.
- **Multiple Choice** – The Manager selects all appropriate responses from provided options.
- **Rating** – The Manager selects a rating from one to five stars. Add a description of each star rating to clearly define what each one means.
- **Comments** – A text field where Managers can respond to specific questions.
- **NOTE** If you toggle **Allow Comments** underneath any of the question types, this provides a text field where Managers can provide additional feedback.

Assessment Form – Evaluation Criteria

When you create an Assessment Form, notice the **Evaluation Description** section under each question. This is your opportunity to clearly define what each answer option means and provide Managers with a detailed rubric. For example, if a Manager is going between “Exceeds Expectations” and “Meets Expectations,” they should understand clearly what falls under each of these buckets.

How to Add Details to a Certification

Once you have created an Assessment Form, you are ready proceed to **Coach** and create a Certification.

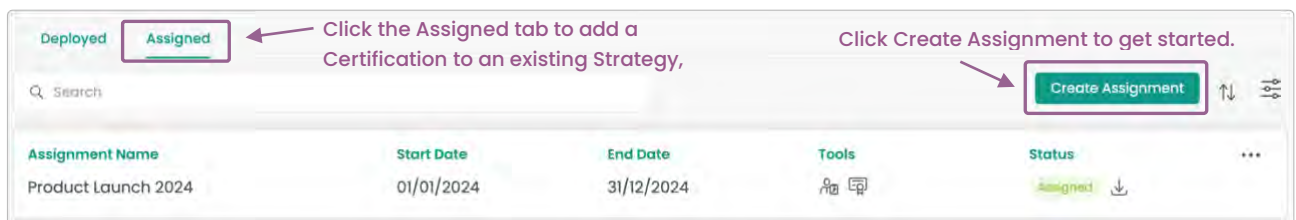


1. Click into **Coach** from the Side Navigation menu. Click **Create** on the top-right of the page and select **Certification**. You may also click **View All** next to Certifications to navigate to the Certifications section, and create a new Certification there.
2. In the Certification wizard, enter a Name and Description (Optional) for the Certification. Select the **Assessment Form** you created in Content Management. Click **Create**.
3. With a Certification you may add **Settings, Tags, Competencies and Stakeholders** specific to the Certification. The box on the right explores these in more detail.
4. In the main Certification section, click the dropdown to filter between **All, Active, and Archived**. You can also sort Certifications by **Name, Date or Recently Edited** or use the search bar or filters to navigate.

- **General Settings** – Set the number of attempts the end-user has to complete the Certification.
- **Certifier Settings** – Set display preferences for the Certifier. You may customize Successful and Unsuccessful Certification messages here. Click **Preview** to see what this looks like.
- **User Settings** – Set display preferences for the user. Click **Preview** to see what this looks like.
- **Tagging** – Select the relevant tags and keywords to associate with the Certification.
- **Competencies** – Select the user type the Assessment will be used to certify and choose the competencies they will be assessed on.
- **Stakeholders** – Select collaborators, administrators who can update or delete the Certification based on the permissions you set for them.

How to Assign a Certification

To allow Managers to certify learners, Admins must first assign the Certifications to them using **Launchpad**. Please review step-by-step instructions on the next page.



1. Click [Launchpad](#) from the Side Navigation.
2. Create a new strategy by clicking the [Launch New Strategy](#) button or click into an existing strategy and assign the Certification from there.
3. On the Strategy page click [Assign](#). Select [Coach](#) then [Certification](#). If assigning a Certification to an already created Strategy, select the [Assigned](#) tab under the Strategy and click [Create Assignment](#).
4. Enter details into the Certification wizard. The box on the right explores these in more detail.

- **Essentials** – Enter the Certification name and its start and end date (required).
- **Certifications**– Add one or more Certifications. If you add an assignment date, this schedules the assignment. If you leave this field blank, the Certification is immediately assigned.
- **Notifications** – Select the Certification Notification settings. You may also customize the email Managers receive informing them that they have been assigned a Certification.
- **Proctors** – Select your Proctors i.e., the Manager or Admins who will certify the end-users

Certifications FAQs

Can end-users be recertified if they are not initially successful? End-users may be recertified if a Certification allows more than one attempt. Please reference [How to Add Details to a Certification](#). If more than one attempt is allowed, the Manager will see a **Recertify** option when they click into an unsuccessful learner's certification.

[Click back to Admin Guide to Coaching Certifications Table of Contents](#)



Manager Guide to Coaching Certifications

After an Admin assigns a Certifications to a Manager, the Manager can begin certifying learners. Most of ACTO's administrative features are accessible only on the web version of the platform. **Coach is an exception. Managers must switch to User mode to certify end-users.** This allows managers to also use their mobile devices to complete certifications. Managers may also certify learners on the web platform: simply click the dropdown arrow next to your name. Select **Switch Role – User**. Then click into **Coach**.

How to Certify an End-User

Learners can access a completed Certifications Assessment it has been submitted by their Managers.

1. Click **Coach** from the Navigation menu.
2. Click **Certifications**. Then click into the specific Certification you would like to start.
3. Click through to view **Pending**, **In Progress**, **Certified**, or **Unsuccessful** certifications. Learners who are not yet certified are under **Pending**. Click into Pending and select the learner you would like to certify. Click **Start**.
4. Proceed through the Certification Assessment. Once completed, click **Submit**. To recertify a learner, click their name and select **Recertify**. This is only available if multiple certification attempts have been set by the Admin.



Quick Guide to Certifications – Text Only

Admin – Create Assessment Form

1. Expand the **Side Navigation** menu. Click **Content Management**. Select **Forms**. Within **Forms**, click into **Assessments**.
2. Create an Assessment Form. Add details including instructions to the manager and a passing threshold for the certification if applicable. Add questions. Select from **Single**, **Multiple**, **Rating**, or **Comments** question types.

Admin – Create Certification

1. Click into **Coach** by clicking **Content Authoring** and then **Coach** from the **Navigation** menu.
2. On the **Coach** home page, click **Create** and select **Certifications**.
3. Proceed through the **Certifications** wizard and add relevant details to the **Certification** including the **Assessment Form** you created in the **Forms** tool.

Admin – Assign Certification

1. Assign **Certifications** to managers and other administrative roles for them to certify their team members.
2. Click **Launchpad** from the **Side Navigation** menu. Create a new strategy by clicking **Launch New Strategy** or click into an existing strategy to assign a certification within it.
3. On a new strategy page click **Assign**. Then select **Certifications**. On an existing strategy page click **Assigned**. Then click **Create Assignment** and select **Certifications**.
4. Enter details into the **Assign Certification** wizard. Add **Proctors** (**Managers**, **Admins**) who will be able to certify their team members.

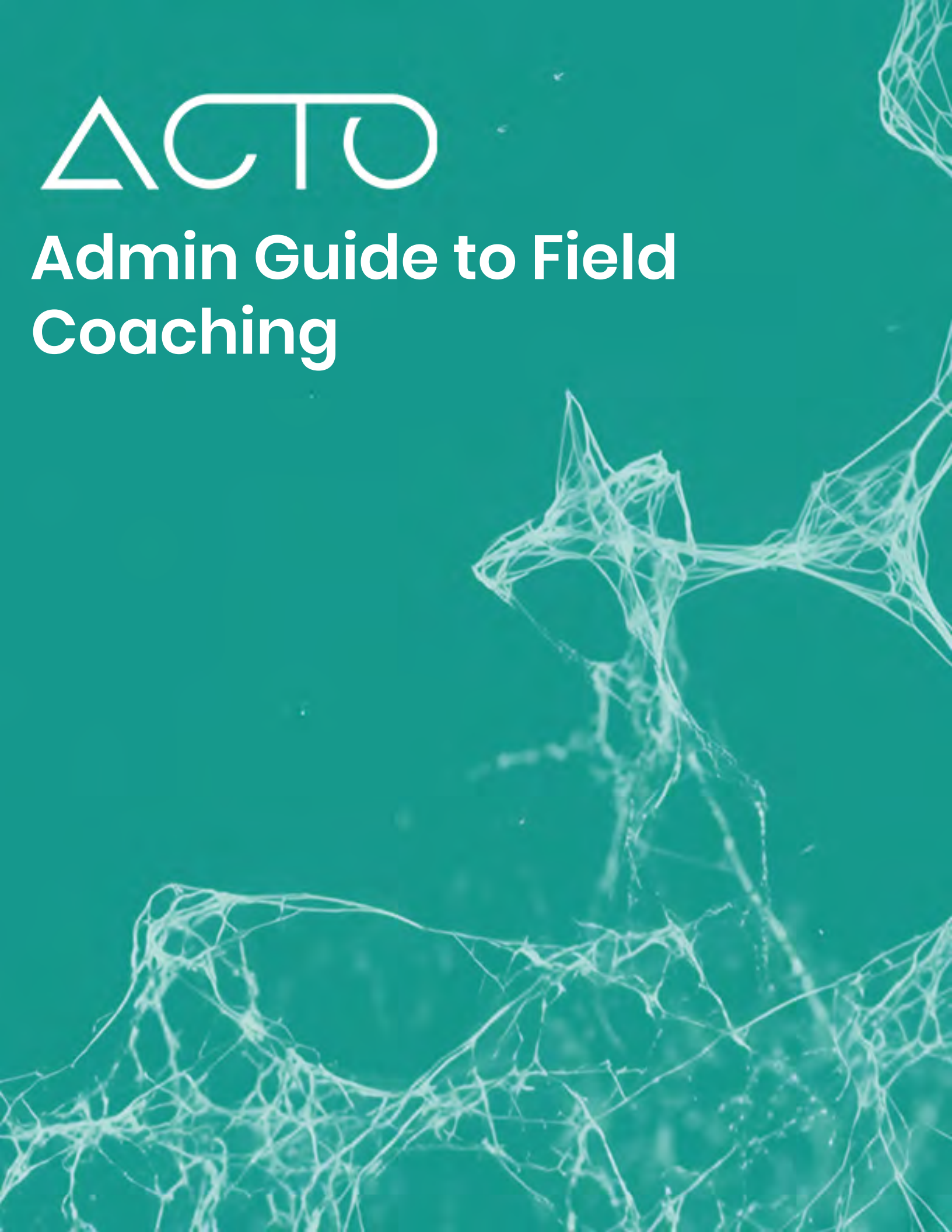
Manager – Complete Certification

1. To complete the **Certification** and certify users [please log in to the platform in User mode](#). On mobile devices, admin roles are automatically in user mode. On web browsers, click your name on the top-right of the screen and click **Switch Role** to switch from administrative to user mode.
2. Click into **Coach**. Click **Certifications**. Then click into the specific **Certification** you would like to complete.
3. All your team members who need to be certified are in the **Pending** section. Click into **Pending**, select a team member and click **Start** to begin the certification process.

[Click back to Admin Guide to Coaching Certifications Table of Contents](#)



Admin Guide to Field Coaching





Admin Guide to Field Coaching

Field Coaching on ACTO allows managers to provide coaching feedback to their field representatives in real time. Platform administrators create Field Coaching rubrics in ACTO's Coach, and assign them to managers. Managers use these rubrics to evaluate their team members in the field, and provide them with feedback.

Click into any of the links below to get started.

Table of Contents

1. [Learning Objectives](#)
2. [How to Access Coach](#)
3. [Field Coaching for Admins](#)
4. [How to Add Field Coaching to Coach](#)
5. [How to Assign Field Coaching to Managers](#)
6. [Manager Guide to Field Coaching](#)
7. [How to Start Field Coaching](#)
8. [How to Submit Field Coaching](#)
9. [How to Assign Pull-Through](#)



Admin Guide to Field Coaching

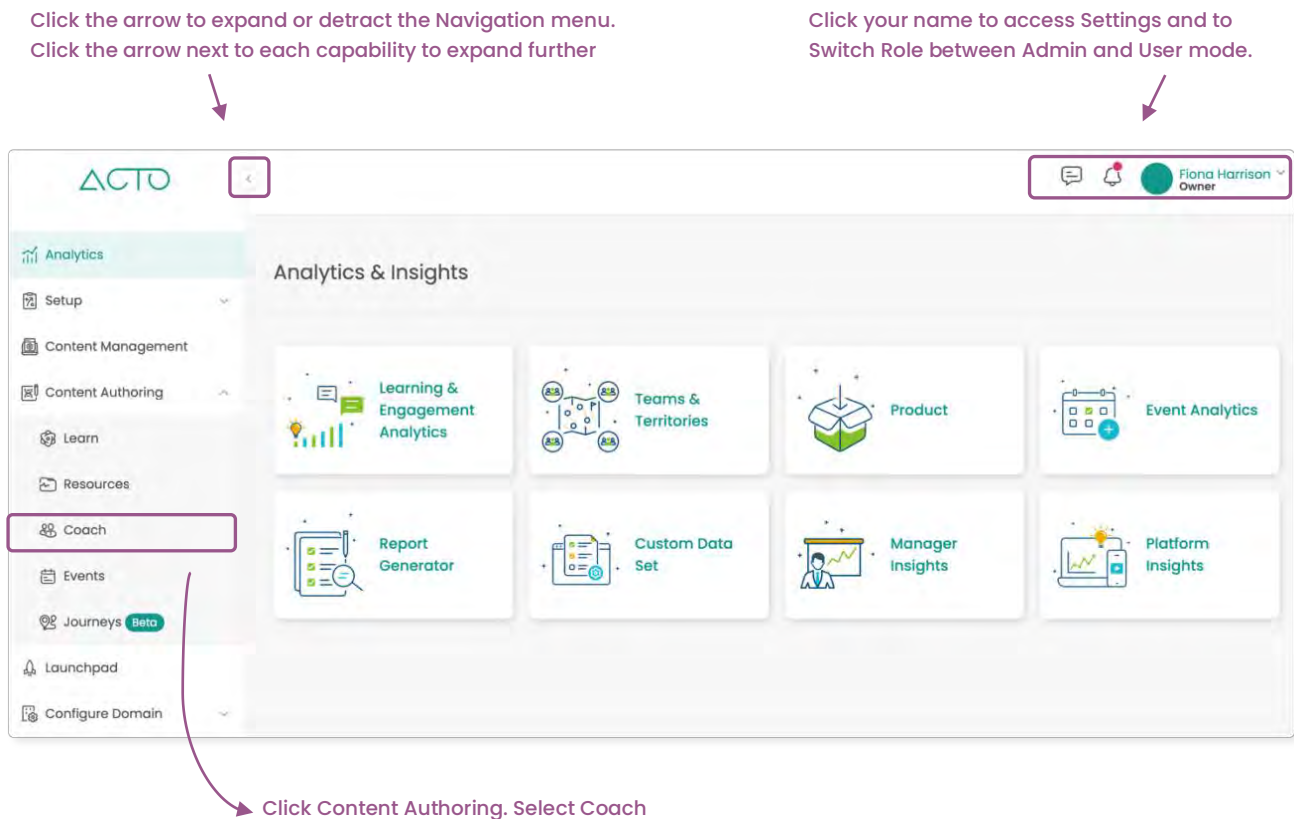
Learning Objectives

- Understand how to create an FCR (Field Coaching Report) using Forms in **Content Management**.
- Understand how to create a Field Coaching session in **Coach**, and link it to the FCR you created.
- Understand how to assign the Field Coaching session to managers using **Launchpad**.

How to Access Coach

Admin and **Manager** roles on ACTO can access **Coach** and view, assign, and start Field Coaching.

NOTE – The above references default role permissions. Permissions for different administrative roles can be updated or customized on a role-by-role or on an individual basis in ACTO's User Management System.



1. Log in to ACTO on your computer browser. Please use Google Chrome or Mozilla Firefox.
2. Make sure you are in administrative mode. End-users cannot access admin functionality.
3. Expand the **Navigation** menu on the left of your screen.
4. Click **Content Authoring**. Select **Coach**.

Field Coaching for Admins

In this guide, you will learn how to create a Field Coaching Report (FCR) within Forms, add the FCR to a Field Coaching session within Coach, and assign the session to managers.

How to Create a Field Coaching Report

To get started, select **Content Management** from the Navigation menu. Click into the folder you would like to house the FCR in. Click **Add New** and select **Form**. Within the Forms pop up click the **Field Coaching Report** tab. Enter the FCR Name, Description (Optional), and an Expiry Date (Optional). Click **Create**.

1. Notice the **Settings** on the right side of the FCR. Here you can set Question Display preferences. Select between **All-in-One** or **Section View**.
2. Add a Name and optional details for each section of the FCR. Add questions by clicking **Add Question** and selecting a question type. Add answer options and an evaluation description for each option, if applicable.
3. Notice the **Question Settings** under each question. Select **Mandatory** if this question is required. Select **Visible** to have the question visible to end-users. Select **Answerable by User** to allow users to answer the question. Select **Comments** to allow Managers to add additional commentary or feedback.

- **Single Choice** – The Manager selects the most appropriate response from provided options.
- **Multiple Choice** – The Manager selects all appropriate responses from provided options.
- **Rating** – The Manager selects a rating from one to five stars. Add a description of each star rating to clearly define what it means.
- **Comments** – A text field where Managers can respond to specific questions.
- **NOTE** If you set **Comments** under the Question Settings for any of the non-Comment question types, it provides a field for Managers to provide additional feedback.

Field Coaching Report – Evaluation Criteria

When you create an FCR, notice the **Evaluation Description** section under each question. This is your opportunity to clearly define what each answer option means and provide Managers with a detailed rubric. For example, if a Manager is going between “Mastery” and “Advanced,” they should understand clearly what falls under each of these buckets.

How to Add Field Coaching to Coach

Before assigning an FCR to a manager you must create context around it. You can do this by creating a Field Coaching session within Coach, and adding the FCR to this session.



1. Click into **Coach** from the Side Navigation menu. Click **Create** on the top-right of the page and select **Field Coaching**. You can also click **View All** next to Field Coaching to navigate to the Field Coaching screen, and create a new Field Coaching session there.
2. In the Field Coaching wizard, enter a **Name** for the session and an optional description. Select the **Field Coaching Report** you created in **Content Management**. Click **Create** to save.
3. Add **Settings**, **Tags**, **Competencies** and **Stakeholders** specific to the Field Coaching session. See right for details.
4. Within the Field Coaching main screen, you can use the Search bar or filters to find specific Field Coaching sessions. You can view existing sessions in list view, or sort by name, date, or most recently edited.

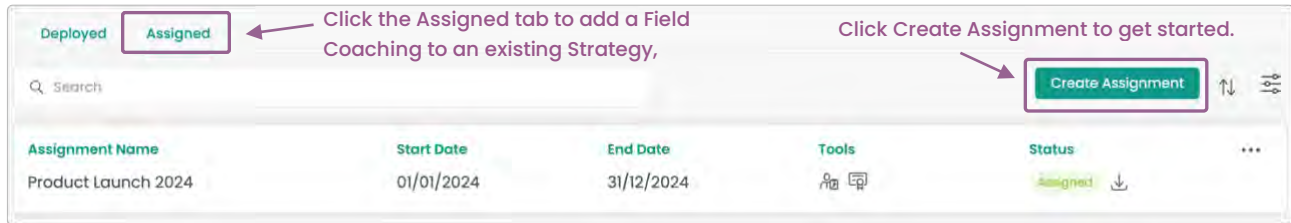
- **General Settings** – Click **Allow Comments for Field Coaching Report** to allow the manager and the end-user to comment on the submitted FCR. Click **Notify users on Field Coaching Completion** to notify end-users when the FCR has been submitted.
- **Proctor Settings** – Click **Allow Field Coaching Report Downloading** to allow the proctor to download the completed FCR.
- **User Settings** – Click **Display Completed Field Coaching Report** to enable the end-user to view the completed FCR. Click **Acknowledgement Required** to require the user to acknowledge the completed FCR. You can customize the text here.
- **Pull-Through** – Add Learning Sets, Collections, and Resources to the session. Once a manager submits an FCR they can assign these resources to the end-user.
- **Tagging** – Select relevant tags and keywords to associate with the Field Coaching session.
- **Competencies** – Select the user type the FCR will be used to evaluate and choose their competencies.
- **Stakeholders** – Select collaborators, administrators who can update or delete the Field Coaching session.

Once you have created Field Coaching session, you can enable or disable the above settings. These settings impact what actions the manager and end-user can take with the FCR, and what the end-user can view.

PROTIP Once a manager submits an FCR, they can quickly select from the added Pull-through, assign it to the user, driving a culture of accountability and ensuring their teams have the training they need.

How to Assign Field Coaching to Managers

For a manager to be able to deploy a Field Coaching session and complete the FCR for a field representative, Admins must first assign it to them using **Launchpad**. Once it has been assigned, they can use it for their teams.



1. Click **Launchpad** from the Side Navigation.
2. Create a new strategy by clicking the **Launch New Strategy** button or click into an existing strategy and assign Field Coaching from there.
3. On the Strategy page click **Assign**. Select **Coach** then **Field Coaching**. If assigning a Certification to an already created Strategy, select the **Assigned** tab under the Strategy and click **Create Assignment**.
4. Enter details into the Field Coaching wizard.

- **Essentials** – Enter the Field Coaching name and its start and end date (required).
- **Field Coaching** – Add one or more Field Coaching sessions. These are the sessions you have created in **Coach**. Select the assignment and due date for each.
- **Notifications** – Set Field Coaching Notification settings. Customize the email if applicable.
- **Proctors** – Select Proctors. Proctors are the managers who will be initiating Field Coaching sessions with users.

[Click back to Admin Guide to Field Coaching Table of Contents](#)

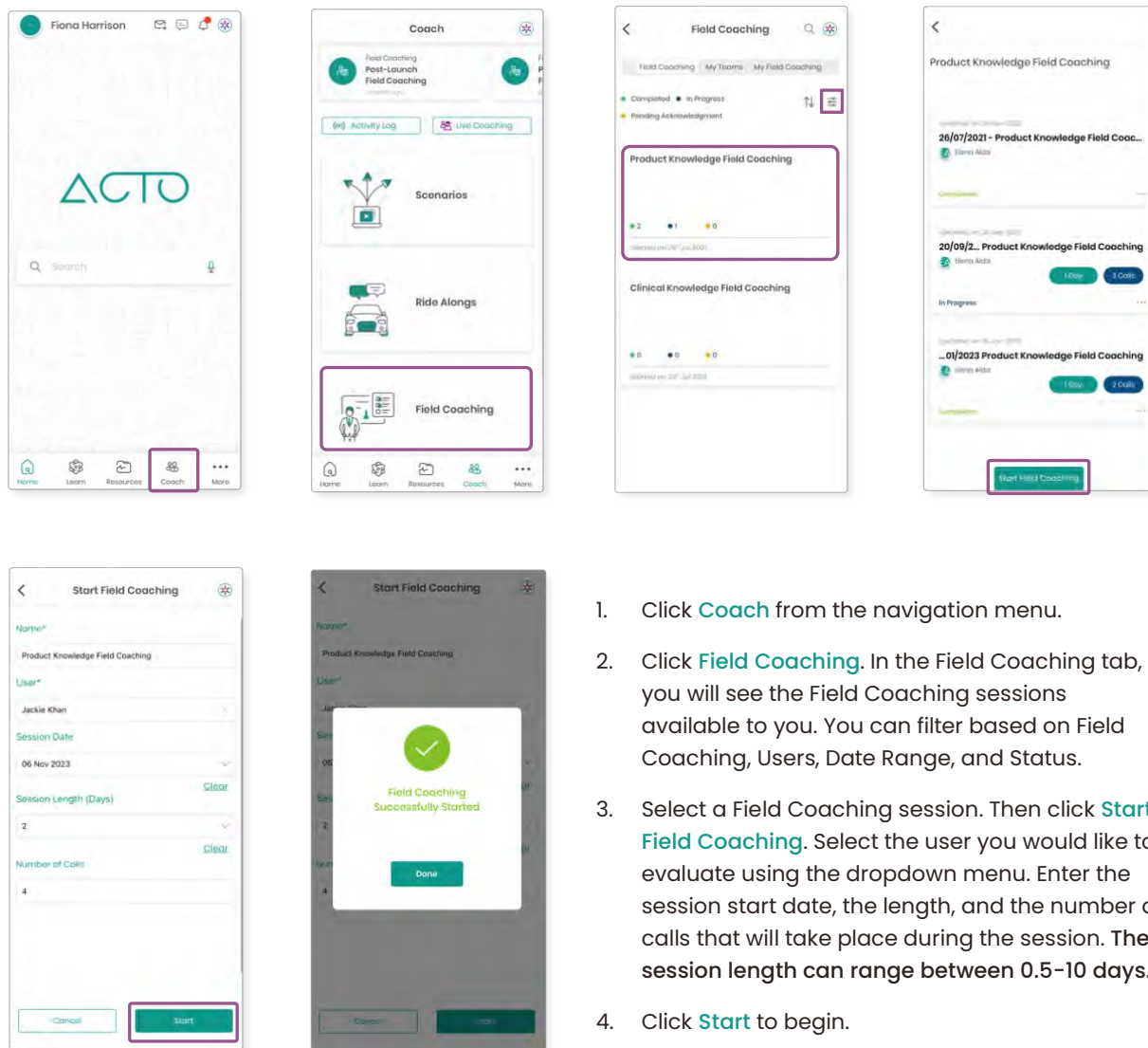
ACTO

Manager Guide to Field Coaching

Once an administrator assigns Field Coaching to a manager, the manager is able to evaluate their field teams using a Field Coaching Report. This is done by selecting a team member, and then filling out the report.

How to Start Field Coaching

Most of ACTO's administrative features are found on the web version of the platform. **The Coach tool is one of the few exceptions. Managers and other Admin roles must switch to User mode for Field Coaching.** This allows managers to also use mobile devices to evaluate their team members.

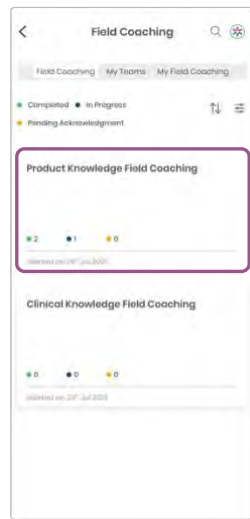
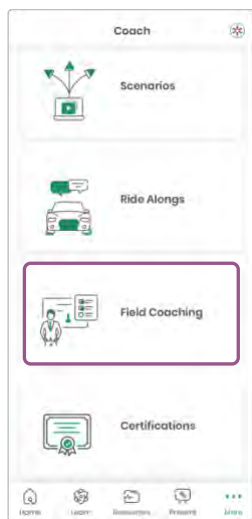


1. Click **Coach** from the navigation menu.
2. Click **Field Coaching**. In the Field Coaching tab, you will see the Field Coaching sessions available to you. You can filter based on Field Coaching, Users, Date Range, and Status.
3. Select a Field Coaching session. Then click **Start Field Coaching**. Select the user you would like to evaluate using the dropdown menu. Enter the session start date, the length, and the number of calls that will take place during the session. The session length can range between 0.5-10 days.
4. Click **Start** to begin.

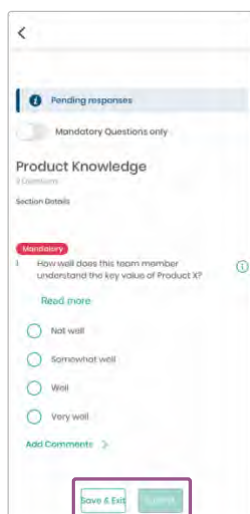
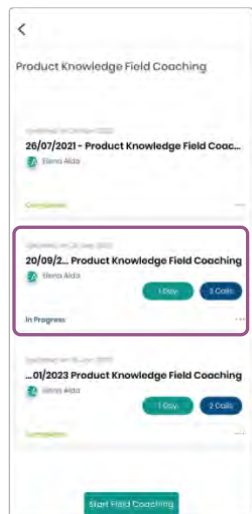
PROTIP Managers can also use Field Coaching on the web platform. Simply log in to ACTO on your computer. Click the dropdown arrow next to your name on the top-right of the screen, and select **Switch Role – User**. Then click into Coach from the Side Navigation.

How to Submit Field Coaching

Once you have completed an FCR for a team member, click **Submit**. Depending on the permissions set on the back-end by the admin who created the Field Coaching session, the user will then be able to access some or all of the completed FCR on their end.



1. Click into **Coach** from the Navigation menu. Select **Field Coaching**.
2. Click into the session you would like to complete. Select the FCR for the individual you are evaluating.
3. Complete the FCR. You may click **Save & Exit** to pause and continue later.
4. Once you have completed the FCR, click **Submit**. Once you submit you will not be able to go back and make changes.
5. If this permission is enabled on the back-end, you will see **Comments**. This enables the manager and the end-user to comment on the Field Coaching Report after it has been submitted.



Field Coaching Statuses

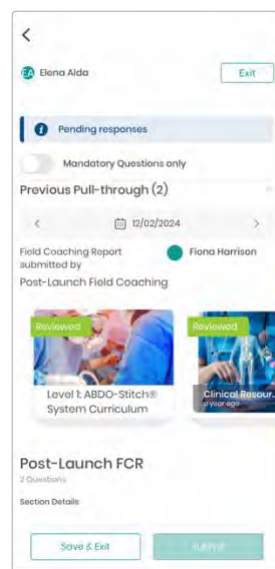
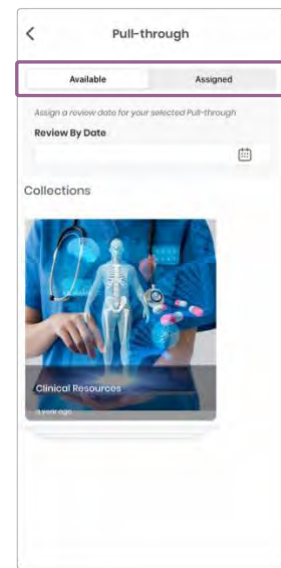
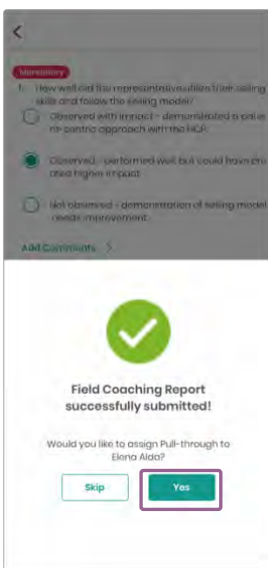
- ① **Completed** – The FCR has been submitted, and any acknowledgements by the end-user have been completed as needed.
- ② **In Progress** – The FCR is in progress. The Manager has not yet submitted the report.
- ③ **Pending Acknowledgement** – The report has been submitted by the Manager. The end-user still needs to submit their acknowledgement.

PROTIP Once you have submitted an FCR you may be able to assign pull-through resources to the user. This option will show up only if your administrator has enabled it when creating the FCR. Please review the section below to learn more about pull-through resources and how to use them.

How to Assign Pull-through

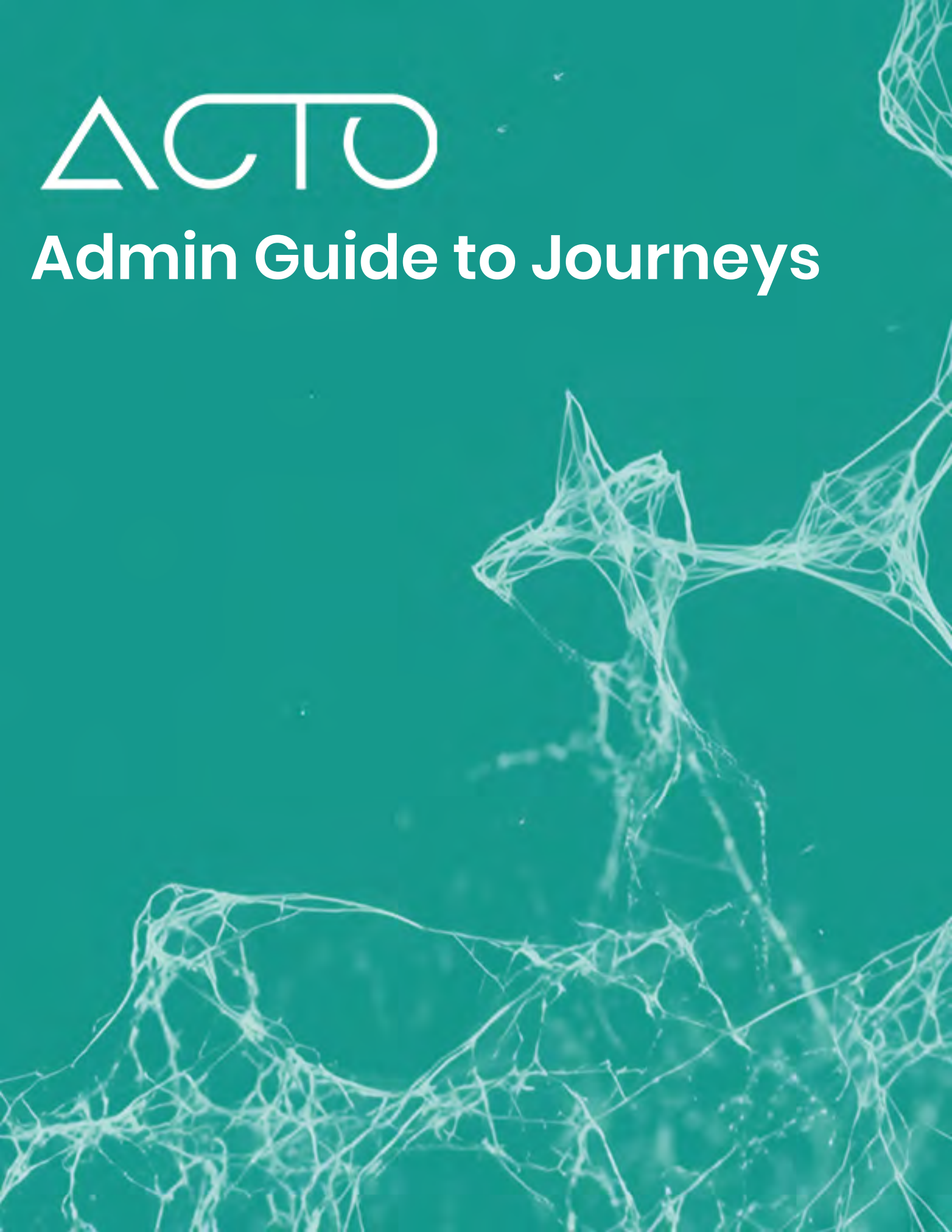
Once you complete an FCR, you have the opportunity to assign your team members additional pull-through training content. This helps drive a culture of coaching and training at your organization. **Please note, this capability is only available if your platform administrator has enabled it.**

1. **Step 1** – Complete an FCR for your team member. Please see [How to Submit Field Coaching](#). See the pop-up messaging asking if you would like to assign pull-through. Click **Yes**.
2. **Step 2** – Click to select from available pull-through. Select a due date if applicable. Click **Add**.
3. **Step 3** – Click **Manage** to add or remove pull-through. The **Assigned** tab shows content the user has already been assigned, and the **Available** tab shows content that may still be assigned to the user.



1. Once the recipient of pull-through has reviewed the resource, you will be able to view the status change when you click into Field Coaching, select that FCR, and view the resource.
2. If a team member has previously been assigned pull-through linked to the same field coaching, you will see it when you click in to complete their FCR.

NOTE The pull-through available to managers is from resources curated by the administrator who created the FCR.

The background is a solid teal color. It is decorated with several white spider webs. One web is in the top right corner, another is in the middle right, and a large, dense web is in the bottom left and center. The webs are made of thin, white, tangled lines.

ACTO

Admin Guide to Journeys



Admin Guide to Journeys

Journeys on ACTO allows you to build out adaptive learning experiences. This creates new learning pathways for learners with curated modules, resources, and assessments based on how they perform in quizzes or respond to surveys along the journey.

Click into any of the links below to get started.

Table of Contents

1. [Learning Objectives](#)
2. [How to Access Journeys](#)
3. [Journeys Quick Overview](#)
4. [How to Create a Journey](#)
5. [How to Build out a Journey](#)
6. [How to Add Content from Learn into a Journey](#)
7. [How to Add Content from Resources into a Journey](#)
8. [How to Add Files into a Journey](#)
9. [How to Add Forms into a Journey](#)
10. [How to Add Conditions to a Journey](#)
11. [Journeys FAQs](#)

Admin Guide to Journeys

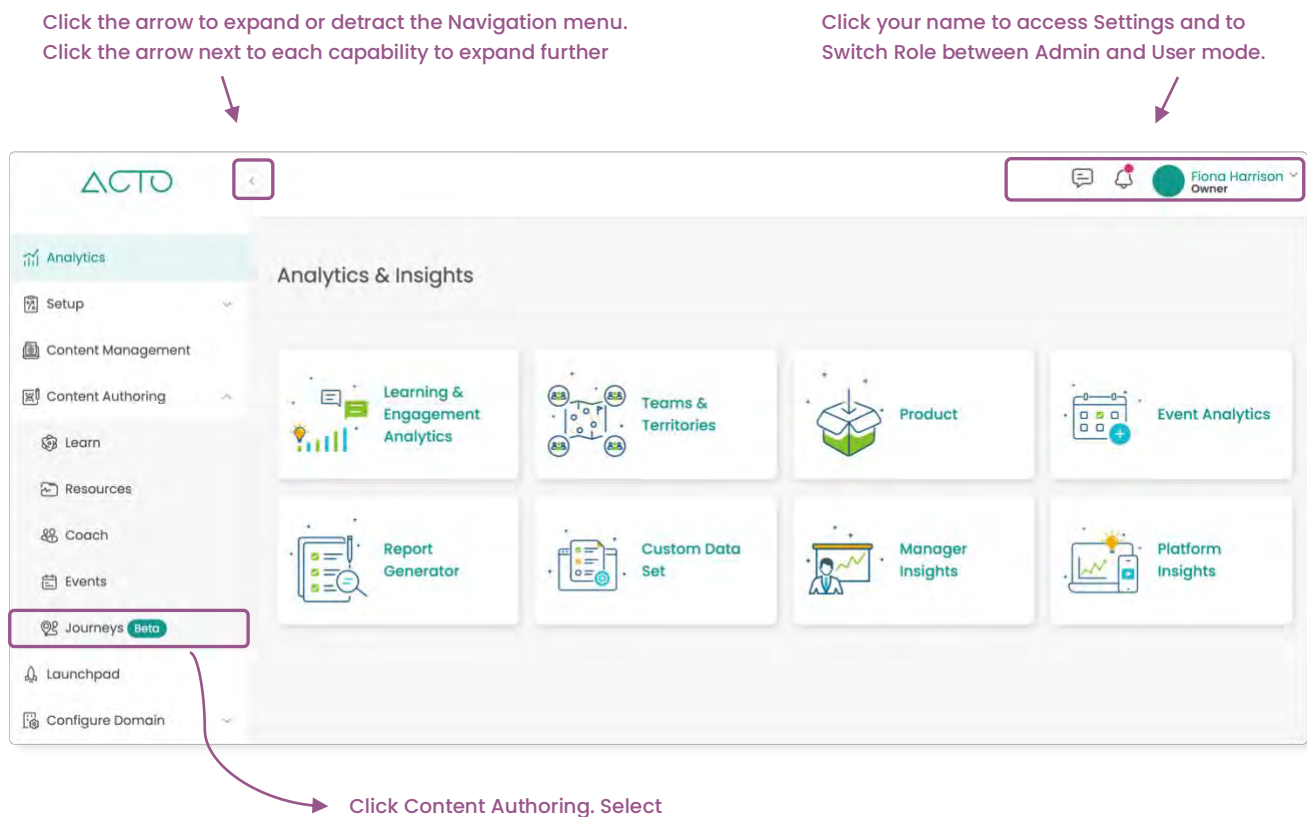
Learning Objectives

- Understand some of the different use cases for journeys.
- Understand how create and deploy Journey.

How to Access Journeys

Owner and Admin roles on ACTO can access Journeys and view and create new Journeys. For all other default administrative roles, permissions must be set on the platform's back end.

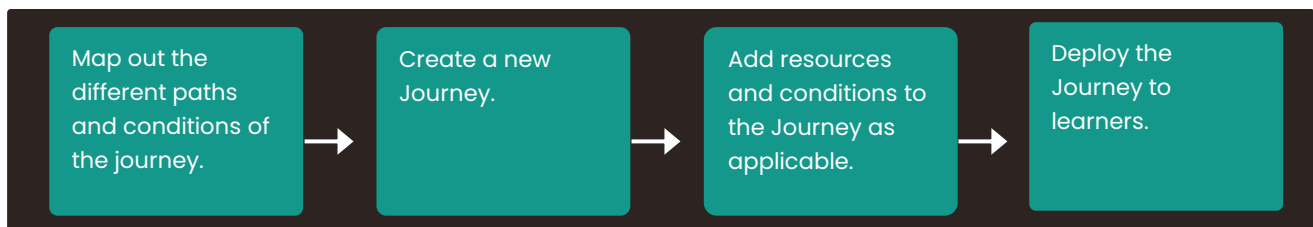
NOTE – The above references default role permissions. Permissions for different administrative roles can be updated or customized on a role-by-role or on an individual basis in ACTO's User Management System.



1. Log in to ACTO on your computer browser. Please use Google Chrome or Mozilla Firefox.
2. Make sure you are in administrative mode. End-users cannot access admin functionality.
3. Expand the Navigation menu on the left of your screen.
4. Click Content Authoring and then select Journeys.

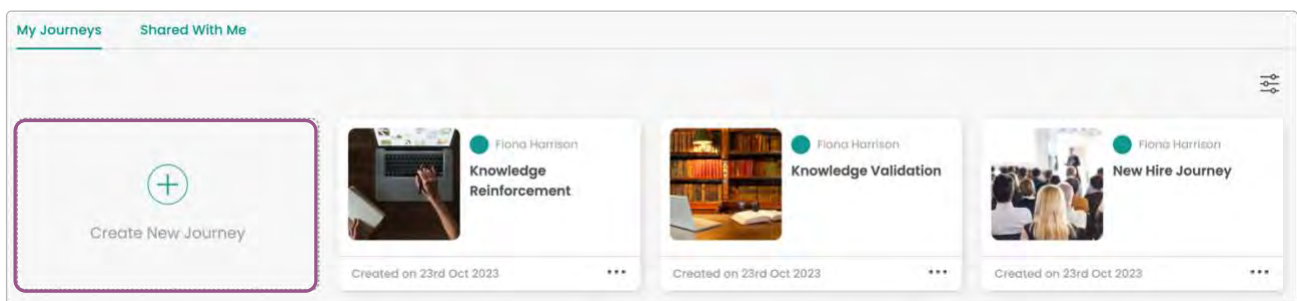
Journeys Quick Overview

- Journeys moves beyond a one-size-fits all approach to learning by allowing you to create and deliver adaptive learning pathways to your learners.
- When creating a journey, the administrator maps out each different pathway and condition a learner may go through depending on how they interact with the training and resources in the journey.
- Journeys leverages training and resources from **Learn, Content Management, and Forms**.



How to Create a Journey

To get started, navigate to the Journeys capability from the **Content Authoring** menu on the left of your screen. Under **My Journeys**, click **Create New Journey** to trigger the wizard that walks you through journey creation.



The pop up wizard is where the Journey Name, Description, and Cover Image are added. While only the Journey Name is mandatory, we recommend using the description and image fields to elevate the user's experience.

The screenshot shows the 'Create Journey' wizard form. It has a title bar with a close button (X). The form contains three sections: 'Journey Name*' with a text input field containing 'Product Training Knowledge Reinforcement'; 'Description' with a text area containing 'This journey is intended to help team reinforce their product knowledge.'; and 'Cover Image' with a preview of a laptop screen and a red 'X' icon indicating an error. At the bottom, there are 'Cancel' and 'Create' buttons.

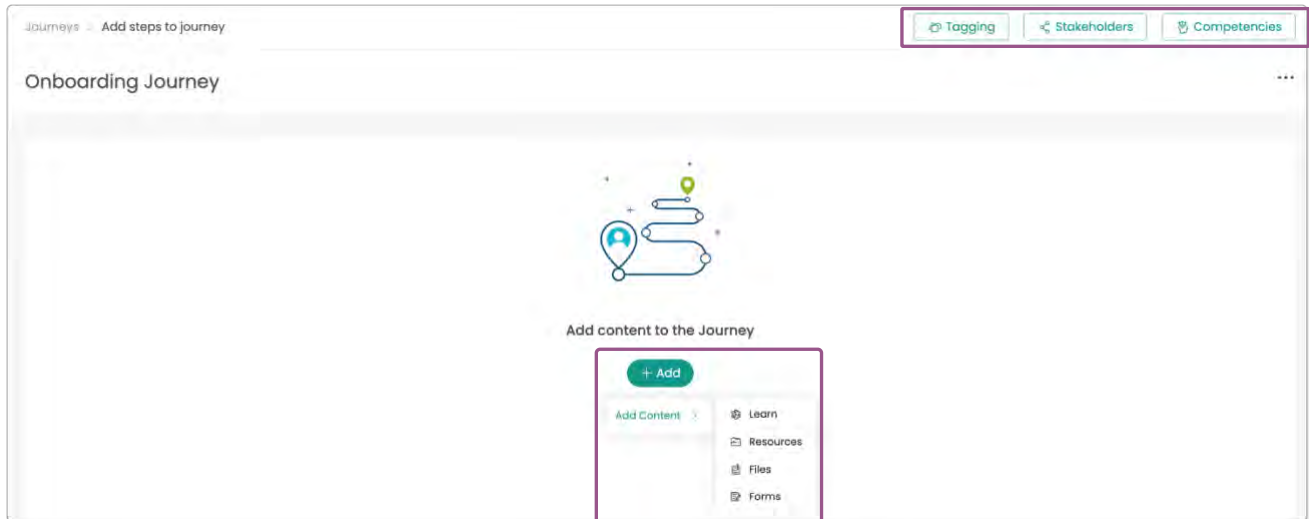
Journey Name – Give the journey a clear name that demonstrates the journey's purpose. This field has a 255

Description – Write a learner-facing description of the journey. This is an opportunity to provide the learner with an overview of what to expect as they go through the journey.

Cover Image – Adding a cover image differentiates the journey from others, and adds to a much more engaging user experience.

How to Build out a Journey

You can add Learning Sets, ActionPacks, and Collections to your journey from **Learn** and **Resources**. You can also add individual files, and forms like quizzes, surveys, and digital signatures from **Content Management**.

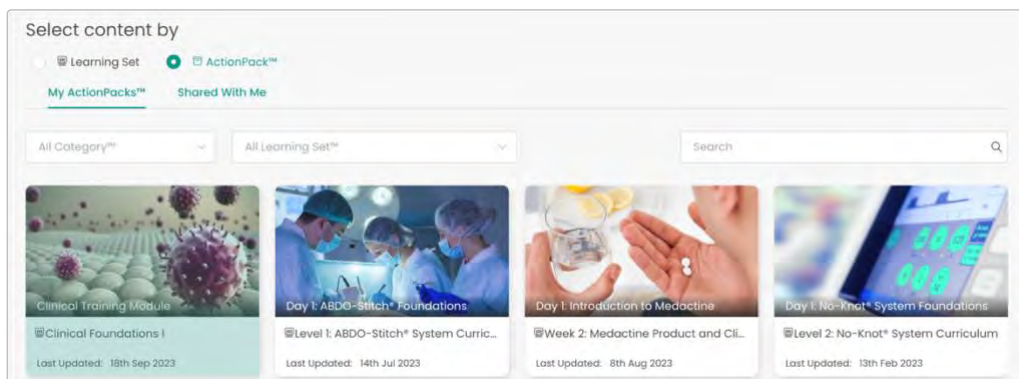


Once you begin to build out the journey, you can add conditions and create divergent pathways. To get started, click **Add** to the new journey you created, and select a content type from the resulting dropdown menu. To add **Tags**, **Stakeholders**, or **Competencies** to your journey, click the respective buttons on the top right of the page.

PROTIP Once you create and deploy a journey, you cannot edit or change it in any way. This is where duplication comes in handy, allowing you to recreate and then edit the structure of an existing journey.

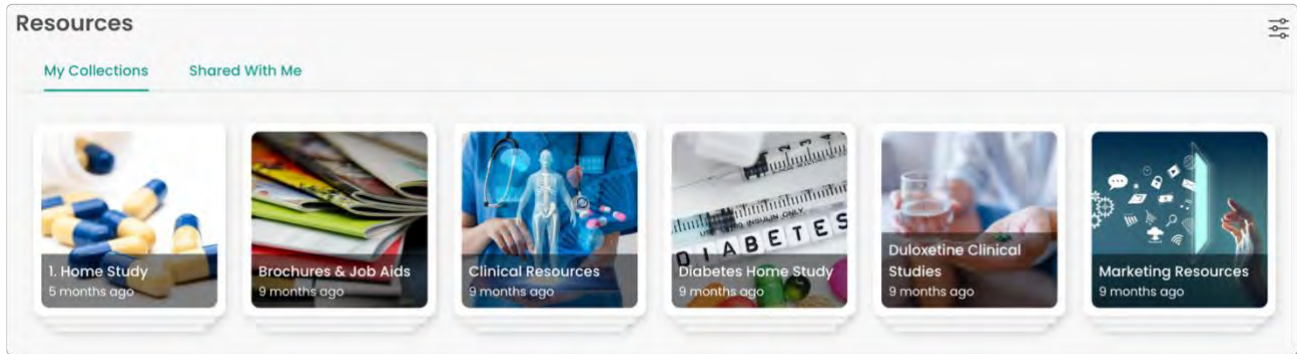
How to Add Content from Learn into a Journey

To add content from Learn into a journey, click **Add > Add Content > Learn**. Click **Learning Set** or **ActionPack** to filter what type of content you want to add. Once selected, click **Add Learning Sets** or **Add ActionPacks**.



How to Add Content from Resources into a Journey

To add content from Resources into a journey, click [Add](#) > [Add Content](#) > [Resources](#). Select the Collection you would like to add to the journey and once selected, click [Add Collections](#).



How to Add Files into a Journey

To add files from Content Management into a journey click [Add](#) > [Add Content](#) > [Files](#). Select the specific assets you want to add to the journey. You may filter resources by file type on the left of the screen. Files types include Image, PDF, Document, Video, Checklist, Hyperlink, and YouTube video. Once selected, click [Add](#).

How to Add Forms into a Journey

To add forms from Content Management into a journey, click [Add](#) > [Add Content](#) > [Forms](#). You may filter and select from the following form types: Survey, Quiz, and Digital Signature. Once selected, click [Add](#).

How to Add Conditions to a Journey

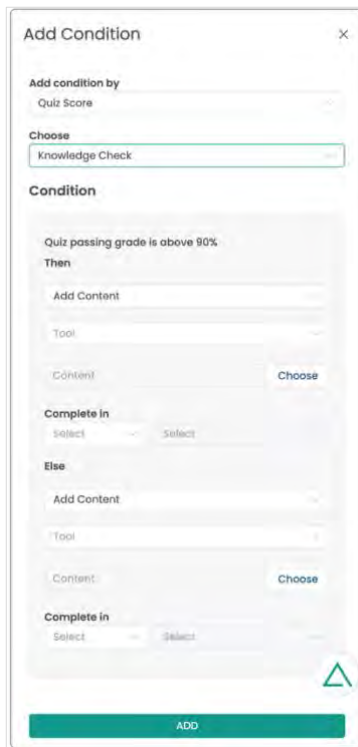
You have started your journey by adding content from [Learn](#), [Resources](#), and [Content Management](#). Once you add an asset, you can add another to continue the learning pathway or you can add a condition. This means that the learner's next step on the journey is determined by the condition attached to the content it's linked to.

Conditions are triggered by Quiz Scores or Survey Scores. They can be added to [ActionPacks](#) and [Learning Sets](#) that contain quizzes or surveys. Conditions can also be added to [Quizzes](#), and [Surveys](#) themselves.

EXAMPLE Sarah completes the first of three training ActionPacks. Now, she must complete a quiz. Her journey has set it up so that if Sarah achieves 90 percent or higher, she can proceed directly to the third ActionPack. If she gets a lower score, her administrator can choose what path she should take – whether that's going back the first module, completing the second, taking another quiz, etc. This helps ensure that learners who do not pass a certain threshold are exposed to more training reinforcement, while those who already possess a strong knowledge base can move forward on their learning journeys.

PROTIP Please note that once you add a condition to a particular asset, if you delete that asset from the journey this will remove all the pathways built out below the asset.

Conditions can be added to Learning Sets, ActionPacks, Quizzes, and Surveys. To add a condition to any of these resources click [Add > Add Condition](#).



Click [Add > Add Condition](#) to the resource you would like to add a condition

Under the **Add condition by** dropdown select [Quiz Score](#) or [Survey Score](#). If the resource you selected is a quiz or survey this field will already be filled in.

Under the **Choose** dropdown select the specific quiz or survey you would like to link. If you are adding a condition to a Learning Set or ActionPack, there may be multiple quizzes to select from. If you have selected a survey, you can select the specific survey question to link the condition to.

Under **Condition > Then** select what to do if the learner meets the required threshold. What is the next step in their journey? Here you can select whether to [Add Content](#), [Connect a Node](#), or [End Journey](#).

Under **Condition > Else** select what happens if the learner does not meet the threshold, for example, if they do not meet the quiz passing grade.

PRO TIP Connect a Node allows you to create a condition that links back to and recreates an existing part of the journey for the learner.

Journeys FAQs

What does accelerated learning on a journey mean? If learners are already proficient in certain material, and pass a set quiz or survey threshold, they can skip elements and move on in their learning journey. If they do not pass the threshold, they would be required to complete a pathway to reinforce their knowledge as per the conditions pre-set by the journey's administrator. This allows learners who demonstrate pre-existing knowledge to accelerate through material they already know, and learners who need reinforcement to get it.

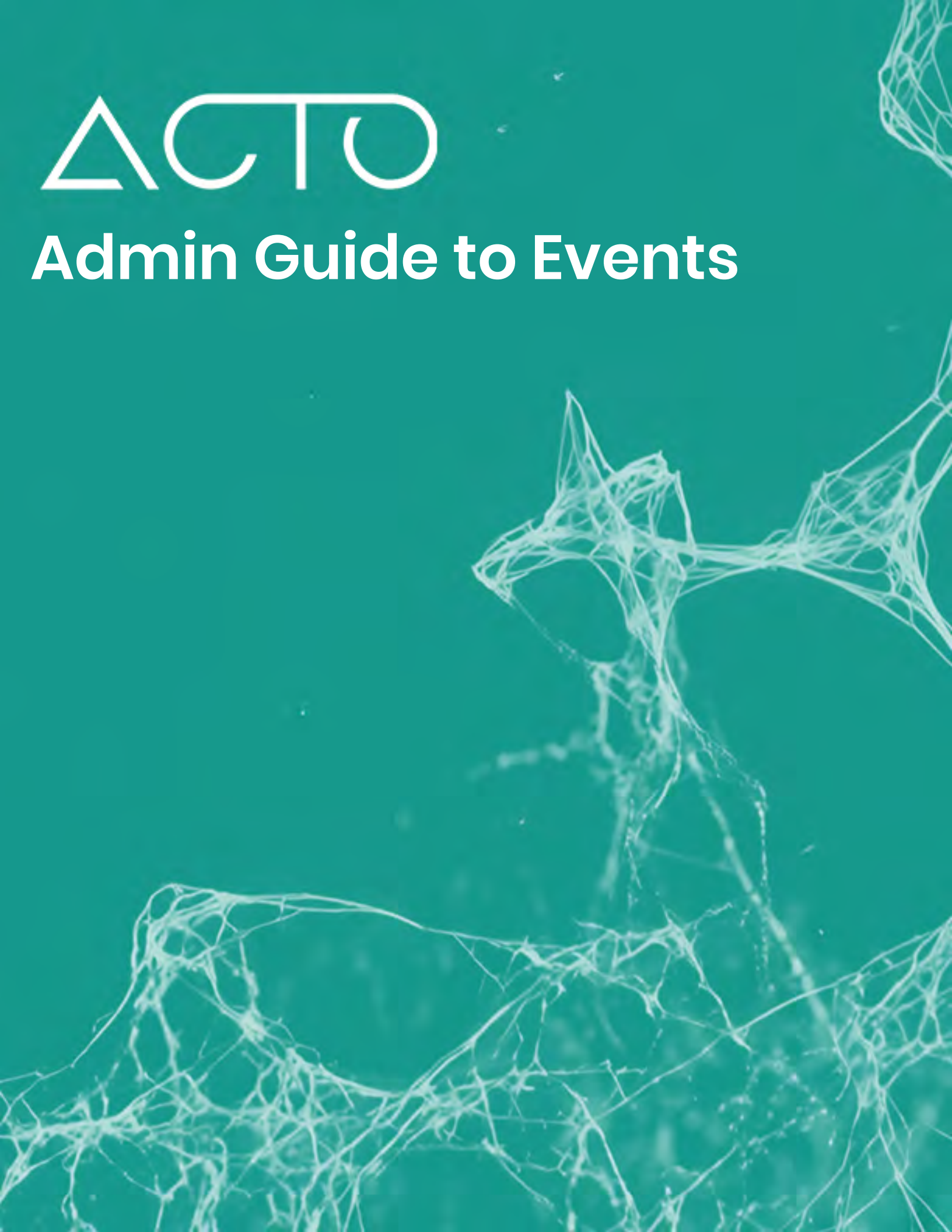
What happens if content needs to be adjusted after a journey has been deployed? Content like Learning Sets, ActionPacks, quiz and survey questions can be adjusted. However, once a journey has been deployed, the steps within the journey – the workflow of the journey itself – can **not** be adjusted or changed.

What kind of reports are available for auditing purposes? The Overall Journey Report outlines learners' progress along their journeys. This report looks at the overall progress based on the step the learner is at in the journey.

Compared to quizzes, which have numerical criteria to determine how the journey branches out, how does a survey determine the branching out? A specific response triggers specific steps along the journey. For example, if a user selects an option stating they have low confidence in their knowledge around a certain subject, this can trigger a different path compared to the path triggered when a user selects high confidence.

What happens if a user is given access to content in a journey they have already completed (e.g., ActionPack)? The content will be marked as complete only if it is the same. If this ActionPack for example was duplicated, and then added to the journey, it will be considered a new element the learner needs to complete once again.

[Click back to Journeys Table of Contents](#)

The background is a solid teal color. It is decorated with several white spider webs. One web is in the top right corner, another is in the middle right, and a large, dense web is in the bottom left and center. The webs are made of thin, white, tangled lines.

ΔCTO

Admin Guide to Events



Admin Guide to Events

Events on ACTO is a one-stop shop for your meetings, whether that's National or Regional Sales Meetings, Product Launches, ongoing training, and more. Use Events to [create your events](#) on the platform, [add agendas, tracks, sessions, prework training and resources](#) - and [share](#) it with attendees.

You may also track engagement with each session's prework, view where team members stand on an event specific leaderboard, and assign free points to end-users based on engagement, interaction, and activity during an event.

Click into any of the links below to get started.

Table of Contents

1. [Learning Objectives](#)
2. [How to Access Events](#)
3. [Events Quick Overview](#)
4. [How to Create an Event Workflow](#)
5. [The Events Page Overview](#)
6. [How to Create an Event](#)
7. [How to Add Event Details](#)
8. [How to Add Sponsors to an Event](#)
9. [How to Add Speakers to an Event](#)
10. [How to Add Event Agenda Tracks](#)
11. [How to Add Event Agenda Sessions](#)
12. [How to Add a Single Session to an Event](#)
13. [How to Add Multiple Sessions to an Event](#)
14. [How to Edit or Add Content to a Session](#)
15. [How to Add Resources to an Event](#)
16. [How to Assign an Event](#)
17. [What Event Analytics are Available?](#)
18. [Event Manager Guide to Events](#)
19. [How to Deploy an Event](#)
20. [How to Remove Invitees from a Session](#)
21. [How to Send an Event Message](#)
22. [How to Start a Session Poll](#)

Admin Guide to Events

Learning Objectives

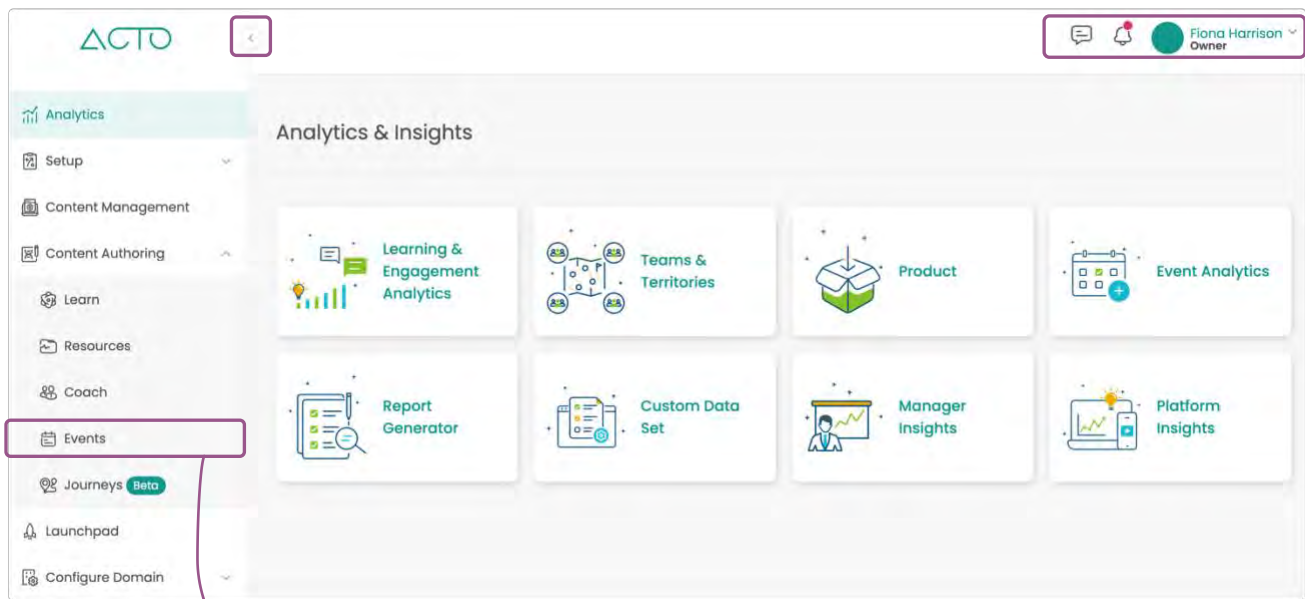
- Understand how to add and update sponsors and speakers to events
- Understand how to create agendas for events including tracks and sessions
- Understand how to link resources and prework to event sessions
- Understand how to assign an event to Event Managers
- Understand how to deploy an event to end-users

How to Access Events

Admin roles can create, view, and manage events. Managers and Draft Managers can view, manage, and collaborate on shared events. Drafters can view and collaborate on shared events. To learn more about default role permissions, please reference the [ACTO Default Role and Permissions Table](#).

Click the arrow to expand or detract the Navigation menu.
Click the arrow next to each capability to expand further

Click your name to access Settings and to
Switch Role between Admin and User mode.



Click Content Authoring. Select Events.

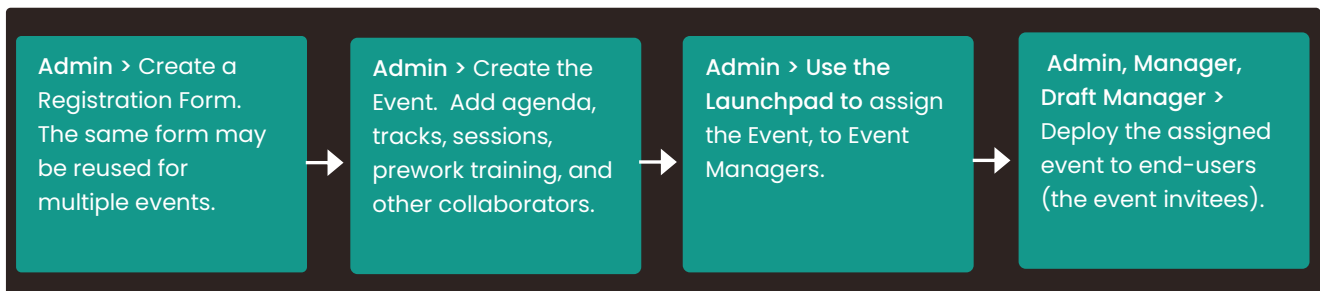
1. Log in to ACTO on your computer browser. Please use Google Chrome or Mozilla Firefox.
2. Make sure you are in administrative mode. End-users cannot access admin functions.
3. Expand the Navigation menu on the left of your screen.
4. Click Content Authoring and then select Events.

Events Quick Overview

- Events allows platform administrators to create and manage events on the platform. This includes adding event agendas, tracks, and sessions; speakers and sponsors; linking prework training and resources to the event; and sharing all of this with the end-user invitees.
- Prework and resources added to events may be accessed before, during, or after an event. Resources can be linked to specific sessions, or added as free-standing resources linked to the whole event.
- Platform administrators can also track and measure engagement and participation for specific events with insightful event dashboards and a leaderboard.

How to Create an Event Workflow

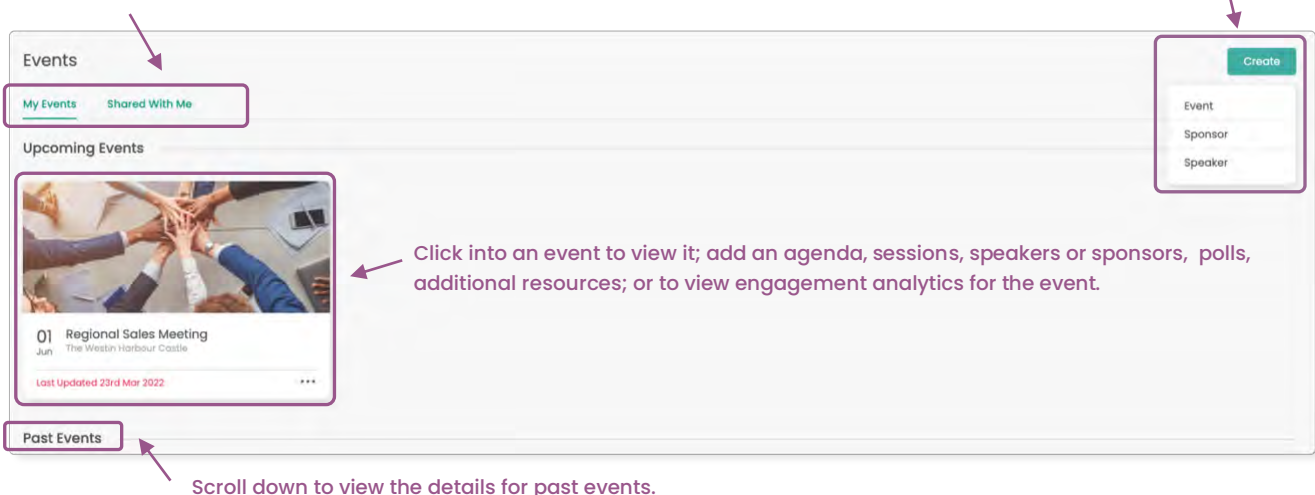
NOTE – Before creating an Event, please create a Registration Form in the Content Management system. A Registration Form is required for events – it allows administrators to capture details from invitees related to the event, for example attendance details or dietary preferences.



The Events Page Overview

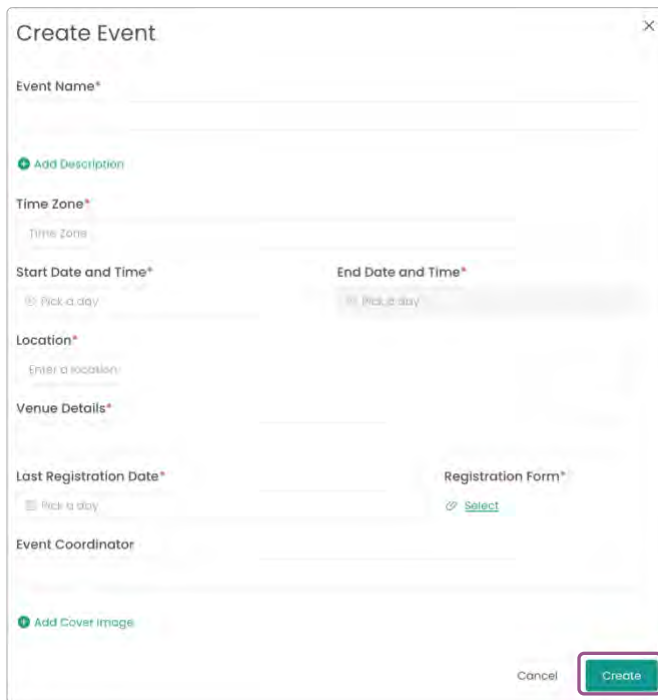
My Events are the events you create, or have access to as an Admin. Events you have been added to as a collaborator are under the Shared With Me tab.

Click the Create button to create an Event, or to add a non-event-specific Sponsor or Speaker. You can add them to specific events later.



How to Create an Event

The Event wizard walks you through building out an event. To get started, click **Create** on the top-right of the Events page. Select **Event**. This opens up a pop-up wizard where you may enter event-related information.

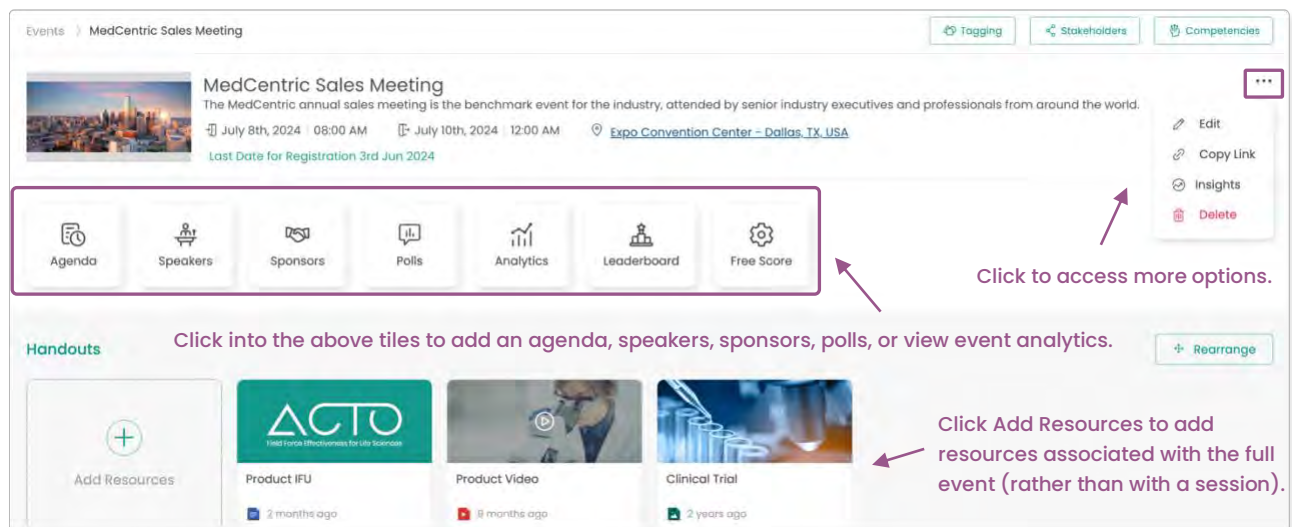


1. **Event Name** – Enter the event name.
2. **Add Description** – Add an optional admin-facing description.
3. **Time Zone** – Select the event's time zone.
4. **Date and Time** – Select the start and end date and time for the event.
5. **Location and Venue Details** – Enter the event location, and additional venue details.
6. **Last Registration Date** – Select the last registration date for participants.
7. **Registration Form** – Select the Registration Form you already created in the CMS.
8. **Event Coordinator** – Enter the name of the Event Coordinator (optional).
9. **Add Cover Image** – Upload a cover image.

PROTIP Please create an event Registration Form in Content Management before creating the event.

How to Add Event Details

Once an Event has been created, add details like an agenda, speakers, sponsors, and resources. To get started, click into the Event from the main Events page. Then which content type you would like to add.



Events > MedCentric Sales Meeting

MedCentric Sales Meeting
The MedCentric annual sales meeting is the benchmark event for the industry, attended by senior industry executives and professionals from around the world.
July 8th, 2024 08:00 AM - July 10th, 2024 12:00 AM
Expo Convention Center - Dallas, TX, USA
Last Date for Registration 3rd Jun 2024

Agenda Speakers Sponsors Polls Analytics Leaderboard Free Score

Click into the above tiles to add an agenda, speakers, sponsors, polls, or view event analytics.

Handouts

Add Resources

Product IFU

Product Video

Clinical Trial

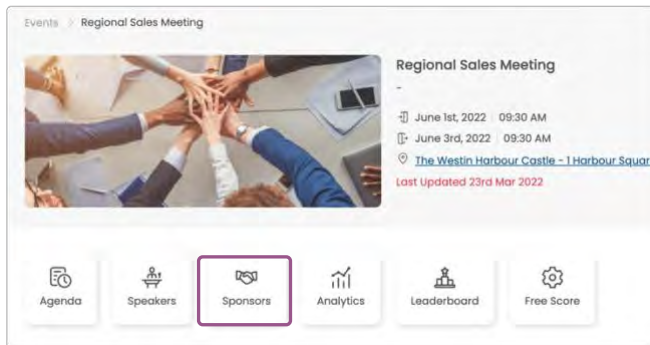
Click Add Resources to add resources associated with the full event (rather than with a session).

Click to access more options.

PROTIP When you click to add an Event Poll, you may link it to a specific session in the event.

How to Add Sponsors to an Event

Sponsors may be added to specific Events. Sponsors that are not event-specific, or are sponsoring multiple events, may be created within the main Events tool and then selected from the Sponsors tile in specific events.

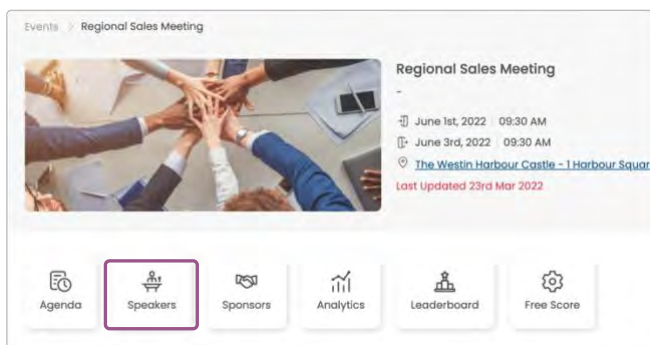


PROTIP You will find all pre-created sponsors when you click **Sponsors** within a specific event. Click the + on the right of a sponsor to add them to an event or the x to remove them from the event.

1. Click into the Event you would like to add a sponsor to. Click **Sponsors**. Then click the **Add Sponsor** button.
2. Enter the event sponsor name and a description. Then upload the sponsor logo in the image field (required). Click the **Add Sponsor** button.
3. Click the **More icon** *** on the side of a sponsor name to edit or delete the sponsor. To remove a sponsor from a specific event, click the **x** on the top-right of the sponsor's name tile.
4. To create a non-event-specific sponsor, click **Create** on the top-right of the Events page. Select **Sponsor**.

How to Add Speakers to an Event

Speakers may be added to specific Events. Speakers that are not event-specific, or will be a part of multiple events, may also be created within the main Events tool and then selected for specific events. **Please create speaker profiles before creating event sessions so that they can be added into sessions as you create them. However, speakers can also be created later and added into existing sessions.**

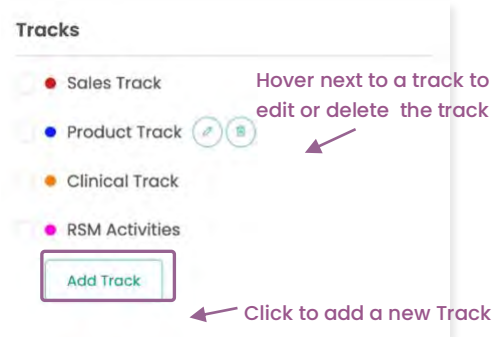


PROTIP You will find all pre-created speakers when you click **Speakers** within a specific event. Click the + on the right of a speaker to add them to an event or the x to remove them.

1. Click into the Event you would like to add a speaker to. Click **Speakers**. Then click the **Add Speaker** button.
2. Enter the speaker's first and last name, company, title, and a short bio. You may add a profile picture and social media links if you wish. Click the **Add Speaker** button.
3. Click the **More icon** *** on the side of a speaker's name to edit or delete the speaker. To remove a speaker from a specific event, click the **x** on the top-right of the speaker's name tile.
4. To create a non-event-specific speaker, click **Create** on the top-right of the Events tool and select **Speaker**.

How to Add Event Agenda Tracks

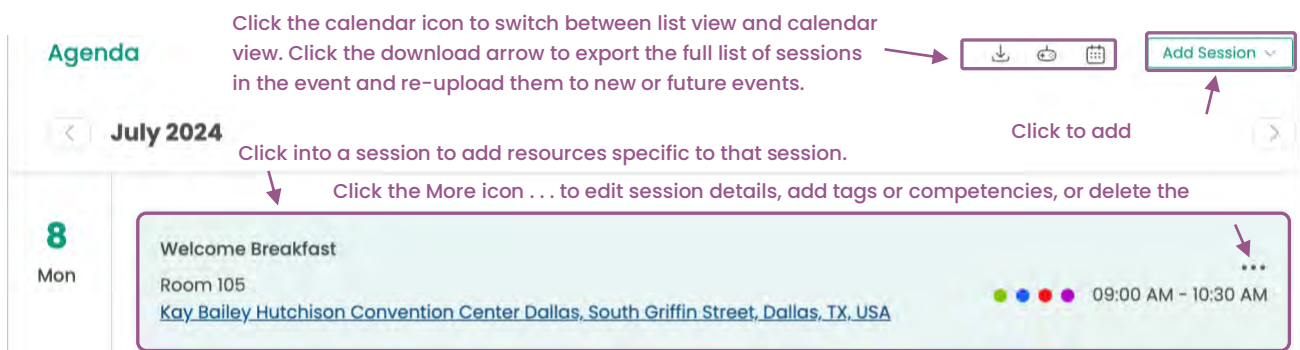
An event agenda is made up of tracks and sessions. It is required to create tracks before creating sessions for the event so that you can organize and link each session to a specific track.



1. Click into the event you would like to begin building out an agenda and tracks for. Click [Agenda](#). Click [Add Track](#) on the left side of the page. Enter a track name. Set a color for the track.
2. Hover over a track, and click the Pencil icon to edit it. Click the Trashcan icon to delete the track.
3. Click the checkbox next to a track to filter and view all the sessions associated with that specific track.

How to Add Event Agenda Sessions

Once you have built the infrastructure for the event, you can begin filling out details around the sessions that will take place at the event. You are able to add one session at a time, or bulk upload sessions for the event.



How to Add a Single Session to an Event

To add a single session to an event, click [Add Session](#) in an event agenda and select [Single Session](#). Then fill out the below fields in the session pop-up wizard.

- **Session Name** – Add the name of the session.
- **Break** – Toggle to break if this session is a break.
- **Description** – Add a description of the session.
- **Start and End Date and Time** – Select start and end dates and times for the session.
- **Venue** – Enter the name of the venue.
- **Place** – Select the specific location (e.g., Ballroom 1) where the session will take place.
- **Tracks** – Select the track this session is a part of.
- **Session Coordinator** – Add the name of the session coordinator (optional).
- **Allow Comments** – Enable Event Manager and/or Invitee comments on a session level.

How to Add a Multiple Sessions to an Event

To add multiple sessions to an event at one time, click [Add Session](#) in an event agenda and select [Multiple Sessions](#). Then download and populate the attached template. When complete, reupload it to proceed.

Session Name*	About Session*	Place	Tracks*	Start Date*Start Time*	End Date*End Time*	Break*	Session Coordinator
NSM Welcome	NSM kickoff session where we will share information on what to expect across the event days!	Conference Room B	US, Canada, Sales	25/04/2023 13:00	25/04/2023 13:45	No	Nancy Peterson

This is an example row
please delete before uploading

PROTIP Before filling out the multiple session template, please click the [Instructions](#) tab in the template file. This provides details around the required information, formatting best practices, and character limits.

Once you have populated and reuploaded the bulk session template, click [View Details](#) to review it. Here you'll be able to make any edits and resolve potential errors before finalizing. Click the [Pencil icon](#) to edit the details within a session. Click the [Trashcan icon](#) to delete the session.

SESSION NAME*	ABOUT SESSION*	PLACE	TRACKS*	START DATE & TIME*	END DATE & TIME*	BREAK*	SPEAKERS	COORDINATOR
Session 1	This provides details around Session 1.	Conference Room A	Marketing	25/10/2023 14:00	26/10/2023 14:45	No	Add speaker	 
Session 2	This provides details around Session 2.	Conference Room B	Customer Success	26/10/2023 15:00	26/10/2023 15:55	Yes		 

When you are ready to add the sessions to your agenda, click [Add to Agenda](#) on the bottom-right of the screen. If you would like to continue editing this page at a later time, click [Save and Exit](#). Please note that sessions with errors will not be added to the agenda.

How to Edit or Add Content to a Session

You may edit the session name, description, location, time and such details by clicking the [More icon](#) *** on the side of a session. You can also add speakers, pre-work, and handouts to a session. Pre-work refers to [Learning Sets or Collections from the Learn and Resource capabilities](#). Handouts are individual resource files.

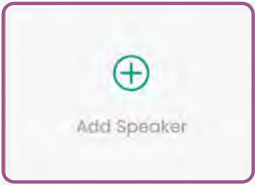
Welcome Breakfast

Welcome breakfast session. Includes introductions and detailed event agenda.

📅 08 Jul 2024 09:00 AM 📅 08 Jul 2024 10:30 AM 📍 Room 105

📍 [Kay Bailey Hutchison Convention Center Dallas, South Griffin Street, Dallas, TX, USA](#)

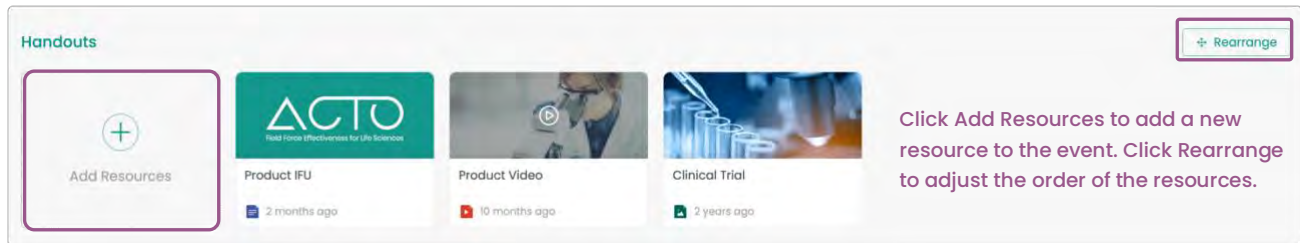
Speakers



1. Click into an Event. Then click into the Event [Agenda](#) and select a session you would like to add content into.
2. To add speakers to the session click [Add Speaker](#).
3. To add pre-work to the session click [Add Learning Sets](#), [Add Collections](#). To add Handouts to click [Add Resource](#).
4. To delete any content, hover over it and click [x](#) to delete. To rearrange the order or the prework, click [Rearrange](#) on the right.

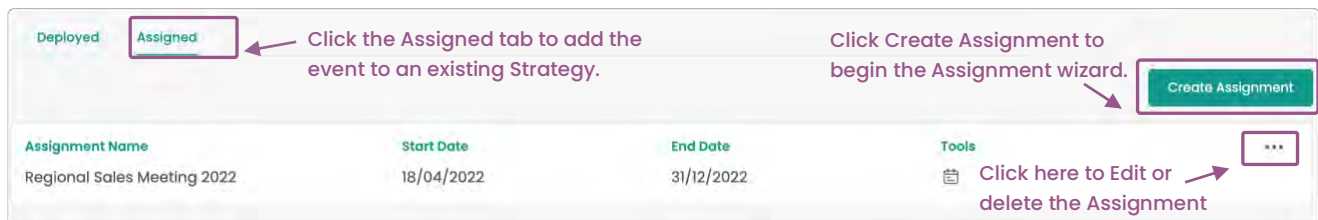
How to Add Resources to an Event

You can link handouts and content to individual sessions, as demonstrated above. You also can link handouts to the full event – for example, travel information, or other event related information. To do so, click into the event. Click the **Add Resources** button and select individual resources from **Content Management**.



How to Assign an Event

For **Event Managers** to be able to deploy events to end-user invitees, Admins must first assign the event to these Event Managers using the **Launchpad**. Admin, Manager, and Draft Manager roles may function as Event Managers.



Please note the difference between assigning and deploying an event. An event is assigned to other administrative roles – Admins, Managers, Draft Managers – using **Launchpad**. These individuals – called **Event Managers** – then deploy the event to end-users, adding them to the full event or individual sessions within the event.

1. Click **Launchpad** from the Side Navigation menu.
2. Create a new strategy by clicking the **Launch New Strategy** button or click into an existing strategy and assign the event from there.
3. On the Strategy page click **Assign**. Select the **Event** option. If assigning an event to an already created Strategy, select the **Assigned** tab under the Strategy and click **Create Assignment**.
4. Enter details into the Event wizard.

- **Essentials** – Enter the event name and its start and end date (required).
- **Events** – Add the event. Click **Schedule** and add a date to schedule the assignment. If you select **Now**, the event is immediately assigned.
- **Notifications** – Select the type of notifications, and customize the email for this deployment.
- **Event Managers** – Select your Event Managers i.e., the Manager, Draft Manager, or Admins who will deploy the event to end-users,

Please note, even the Admin Assigning the event needs to add themselves as an Event Manager in order to be able to deploy the event to the end-users, or audience.

What Event Analytics are Available?

Event Analytics allows administrators to drill down on user engagement and interaction within an event. Click into these tiles on an event page to learn more.

PROTIP If resource engagement analytics are important for your event, it is recommended to compile those resources into Collections or Learning Sets and add them into a session as a prework requirement. Prework may only be added into individual sessions within an event, and not to the event as a whole.

Analytics – Admin roles can access the Event Analytics section. Manager, Draft Manager, and Drafter roles can view the events shared with them, and associated analytics. With the **Pework Dashboard**, Admins can filter by **Team, Event, and Session** and view a pie chart of how many end-users have started, completed, or are progressing through deployed prework. **Pework refers to the Learning Sets and Collections deployed to users from within an event's sessions.**

Leaderboard – Admin roles can view all events and associated Leaderboards. Manager, Draft Manager, and Drafter roles can view the events shared with them, and associated leaderboards. The event leaderboard can be filtered by **Team, and Session**. Any points that an end-user earns within the event Leaderboard will be added to their score on the platform overall leaderboard.

Free Score – Admin roles can view all events and associated **Free Score** section. Manager, Draft Manager, and Drafter roles can view events shared with them, and associated Free Score section. Administrative roles can assign free points to end-users based on engagement, interaction, and activity during an event. Any points earned here will be added to a user's score on the overall platform leaderboard.

[Click back to Admin Guide to Events Table of Contents](#)



Event Manager Guide to Events

How to Deploy an Event

Most of ACTO's administrative features are accessed and used on the web version of the platform. [Deploying events to end-users/invitees](#) is one of a few exceptions. Event Managers and other administrators must switch to User mode – or use a mobile device – to deploy an event.

1. Log in using a mobile device, or switch into user mode on a web browser.
2. Click into [Events](#) from the Navigation menu. Then click the [Manage Events](#) tab.
3. Click into the event you would like to deploy. Click the [Agenda](#) button. You may add invitees to multiple sessions at one time by clicking [Add Bulk Audience](#).
4. You may also add invitees to single sessions. Select the session you would like to invite users to, then click [Add Audience](#).
5. Select who to deploy the event to – you may filter by Role, Team, Territory, or Name. Then click [Invite Audience](#).

How to Remove Invitees from a Session

To remove invitees from an event, click into a session and select [Manage Audience](#). Click the Trashcan icon next to the individual you would like to delete.

How to Send an Event Message

1. Click into [Events](#) from a mobile device, or from user mode on a web browser.
2. Click [Manage Events](#) and select the event you would like to manage.
3. Click [Messaging](#) from the middle of your screen or top-right of web browser. On a web browser, you can click the search bar right under [Messages](#) to search through message groups.
5. Select [Create New Group](#) or the [+](#) sign on web. Click the [Sessions](#) dropdown to add invitees based on session. When you have selected the message audience, click [Create](#).
6. To delete a message, click the three dots on the right of the message and select [Delete Group](#). You may also select [Audience](#) to see the members within the group message.



How to Start a Session Poll

An administrator may add a poll to a session in the event agenda. As an Event Manager, you may launch the poll to the session audience in real-time, and review and update the results in real-time.

Poll Name: Sales Pipeline Poll

Session: Sales Pipeline Workshop

Audience: 

Poll results available to Audience.

Click to open the poll in a new tab on your web browser. 

Click to start the poll 

1. Click into **Events** from a mobile device, or from user mode on a web browser.
2. Click **Manage Events** and select the event you would like to manage. Click into **Polls**.
3. Click into the Poll you would like to start and click the **Start Poll** button.

PROTIP Please note, poll results will only be available to the audience/invitees if this option has been enabled when the administrator is creating the Poll in the Content Management capability.



Admin Guide to Launchpad



Admin Guide to Launchpad

Launchpad on ACTO is the control center for managing and launching your organization's strategies. Launches are built out around strategic initiatives including [Line Extensions](#), [Product Launches](#), [New Indications](#), [New Trial Data](#), [New Hire Onboarding](#), and [New Coaching Programs](#).

Using Launchpad, you will build out strategies – link training, coaching, resources, and other content or initiatives to the strategy – and deploy it out to your teams, all from one place.

Click into any of the links below to get started.

Table of Contents

1. [Learning Objectives](#)
2. [How to Access the Launchpad](#)
3. [Launchpad Quick Overview](#)
4. [Launchpad Workflow](#)
5. [Launchpad Strategies](#)
6. [How to Create a Custom Strategy](#)
7. [How to Launch a New Strategy](#)
8. [How to Add a Deployment to a Strategy](#)
9. [How to Select an Audience for Deployments](#)
10. [How to Add an Assignment to a Strategy](#)
11. [How to Edit a Deployment or Assignment](#)
12. [How to Restart Existing Learn Deployment](#)
13. [How to Customize Deployment or Assignment Emails and Notifications](#)
14. [How to Edit or Complete a Strategy](#)
15. [How to Generate Shareable Links for Deployments](#)
16. [What are Automated Deployment Reminders?](#)
17. [Deployed Content Access Management \(DCAM\)](#)

Admin Guide to the Launchpad

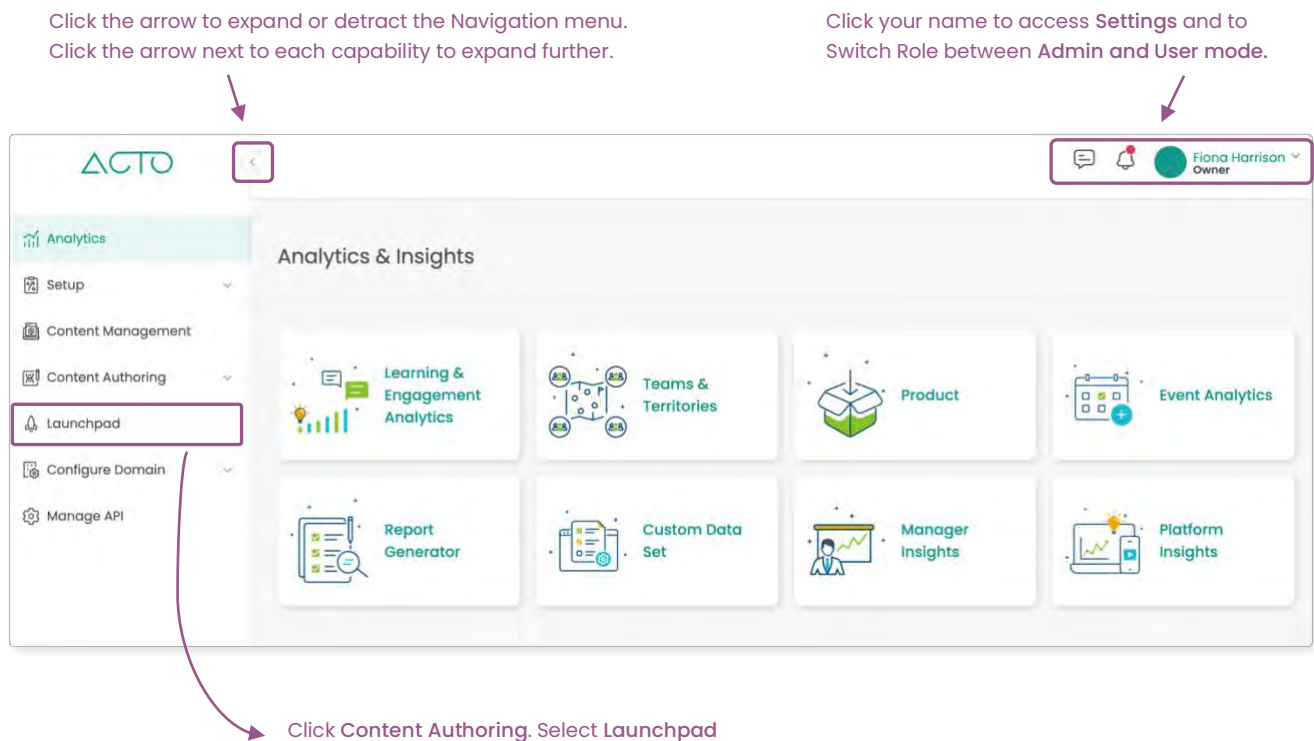
Learning Objectives

- Understand the function of the Launchpad.
- Understand how to create and update strategies.
- Understand how to create and update deployments.
- Understand how to create and update assignments.

How to Access the Launchpad

Admin roles on ACTO can access the Launchpad. Draft Manager and Drafter roles can access the resources that have been shared with them on the Launchpad.

NOTE – Permissions for different administrative roles can be updated or customized on a role-by-role or on an individual basis in ACTO's User Management System.



1. Log in to ACTO on a computer. Please use Google Chrome or Mozilla Firefox for an optimal experience.
2. Make sure you are in administrative mode. End-users cannot access Launchpad functionality.
3. Expand the Navigation menu on the left of your screen.
4. Click into Launchpad.

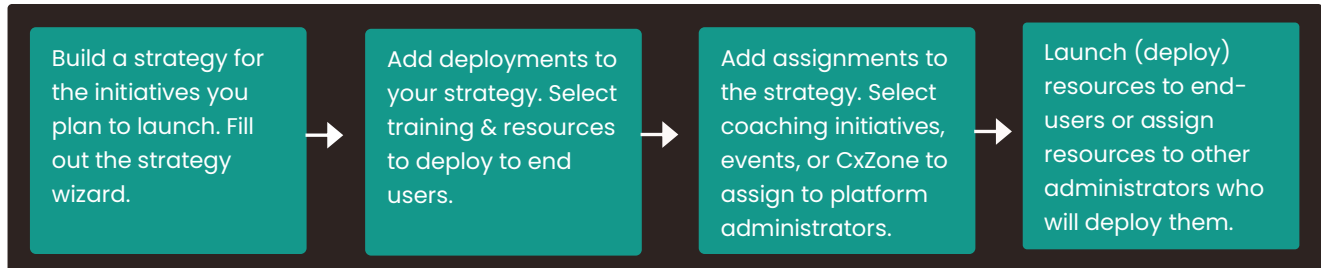
Launchpad Quick Overview

- **Launchpad** is your **control center** for building out, managing, assigning, and deploying your organization's strategies and initiatives.
- Launchpad comprises **strategies, deployments, and assignments**. Strategies can be created around the following six initiatives: **Line Extensions, Product Launches, New Indications, New Trial Data, New Hire Onboarding, and New Coaching Programs**. You can also create custom strategies.
- Once a strategy has been created, deployments and assignments may be added to that strategy.
- A **deployment** is when Learning Sets, Collections, and Journeys related to a strategy are deployed to end-users directly from Launchpad.
- An **assignment** is when Field Coaching, Coaching Scenarios, Coaching Certifications, Events, or CxZone simulations related to a strategy are assigned to managers using Launchpad. These managers – who also need to be on the platform in an administrative role – can then deploy or otherwise manage the above resources to their team members.

Launchpad Workflow

Launchpad allows you to manage, organize, and launch strategic initiatives to your teams.

Protip – Keep the difference between **deployments** and **assignments** in mind. Deployments let you push content or resources **directly** to end-users. Assignments allows you to assign content or resources to other platform administrators – who deploy these to end-users themselves, without using Launchpad.



Launchpad Strategies

Currently, when building out a strategy you may either select from the following strategies listed below, or you may create a custom strategy.

Line Extension – Use this strategy when introducing a new version or enhancement of a product.

Product Launch – Use this strategy when launching a new product.

New Indications – Use this strategy when introducing new indications for an existing product.

New Trial Data – Use this strategy when sharing new information resulting from clinical studies or trials.

New Hire Onboarding – Use this strategy when putting together training and resources for new hires.

New Coaching Program – Use this strategy when deploying a new coaching program – coaching scenarios, field coaching, or certifications.

How to Create a Custom Strategy

You can use the six available strategies, or you may create a custom strategy as shown below.

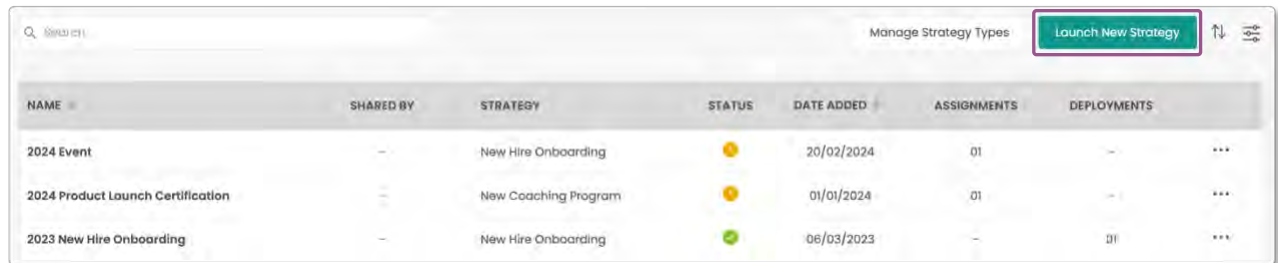


NAME	SHARED BY	STRATEGY TYPE	STATUS	DATE ADDED	ASSIGNMENTS	DEPLOYMENTS
2025 Resources	-	Ongoing Training	🟡	06/11/2025	-	01

- Click into [Launchpad](#) from the Navigation menu.
- Select [Manage Strategy Types](#) on the top-right of the Strategies screen.
- Under [Custom Strategy Types](#) click [+New Strategy Type](#). Enter the name of the strategy, and click the green checkmark or press Enter.
- When you launch a new strategy, you will be able to select the custom strategy you created.
- You can also edit or delete your custom strategy types under [Manage Strategy Types](#).

How to Launch a New Strategy

All deployments and assignments created in Launchpad must exist within a strategy. [Any given strategy can have multiple deployments and assignments associated with it.](#)



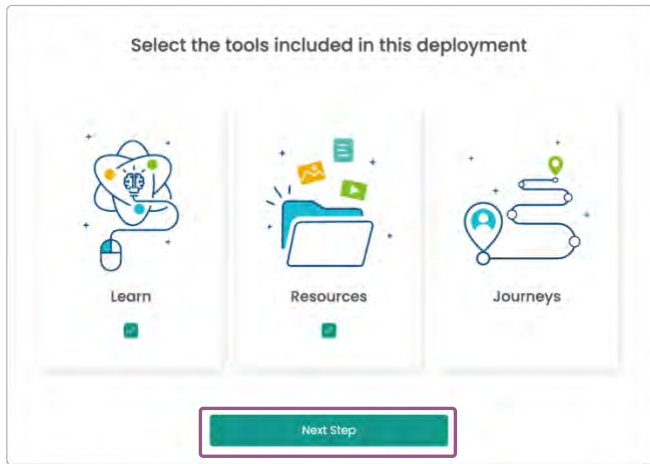
NAME	SHARED BY	STRATEGY	STATUS	DATE ADDED	ASSIGNMENTS	DEPLOYMENTS
2024 Event	-	New Hire Onboarding	🟡	20/02/2024	01	...
2024 Product Launch Certification	-	New Coaching Program	🟡	01/01/2024	01	...
2023 New Hire Onboarding	-	New Hire Onboarding	🟢	06/03/2023	-	01

1. Click into [Launchpad](#) from the Navigation menu. Click [Launch New Strategy](#). Select the type of strategy you would like to launch.
 2. Proceed through the strategy creation wizard and fill out the fields listed on the right.
 3. Review all the information you have entered. When you are ready, click [Create](#).
- **Name Your Strategy** and enter an optional **Description**. Enter a **Start Date** and **End Date** for the strategy.
 - **Select a Strategy Type** from the dropdown menu. Select the **Product** and **Product Launch** related to the strategy if available. Click **Create** to proceed.

Once you create a new strategy, you can get started adding deployments and assignments to that strategy. You can also click into the new strategy to add relevant tags or additional stakeholders. Adding stakeholders allows you to add other administrative collaborators to the strategy, and give them permission to update, manage, or delete the strategy.

How to Add a Deployment to a Strategy

A deployment is simply when a strategic initiative is pushed out – **deployed** – to learners or teams.



To add a deployment to a strategy, click into the new strategy you just created, and select **Deploy**.

Select the capability or capabilities you would like to deploy resources from.

You can deploy **Learn**, **Resources**, and **Journeys** or a combination of these within the same deployment if applicable.

Once you have selected the capabilities, you will be using for this particular deployment,

The deployment wizard walks you through each step of creating a deployment. As you go through the wizard, make sure to click **Save** and **Next Step** after each section you complete. Shared below is what each section of the deployment wizard would look like if you selected Learn, Resources, and Journeys to deploy at one time.

- **Essentials** – Enter the name, start and end date, and an optional description. The start and end date refer to the entire deployment initiative, not for when your resources are pushed out.
- **Learn** – Add Learning Sets to the deployment.

You can deploy the training **Now** or **Schedule** it for a specific date and time.

Under **Due Dates** select **Fixed** or **Range** to add a fixed due date or a range of days, weeks, or months for the learner to complete the training. Select **Range** if you plan to add new ActionPacks to the Learning Set you are deploying.

- **Resources** – Add resource Collections. You may deploy immediately them or schedule them.
- **Journeys** – Add Journeys. You may deploy immediately them or schedule them. You can also add different due dates for each journey.
- **Notifications** – Select how to notify learners of the deployment, and customize the email they receive. You can enable email, push, or in-app notifications (or all three).
- **Audience** – Select teams and users to deploy to. You can filter by role, team, and territory.
- **Review and Complete** – Review and deploy.

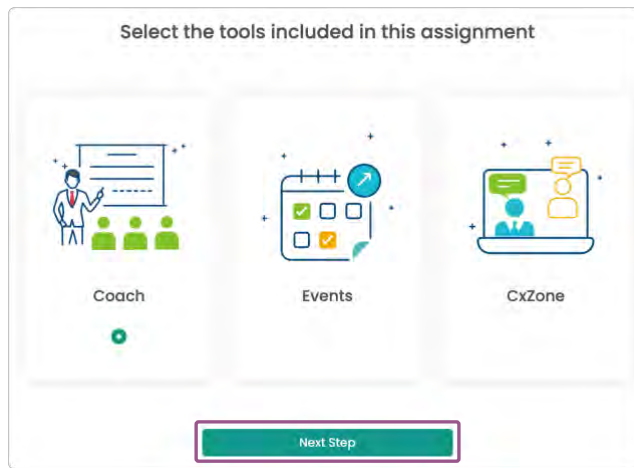
How to Select an Audience for Deployments

When deploying content to the recipients – or the audience – filter by Role, Team, Territory, or search for users by name. When deploying by Role or Territory, click **Select All** to select all the Roles or Territories on the domain. When deploying by team, toggle **Automatically Select Children** to select all the sub-teams under the main teams you are deploying to. If you do not toggle, only the main teams you select will be deployed to.



How to Add an Assignment to a Strategy

An assignment when a strategic initiative is **assigned** to other platform administrators, who then deploy it to end-users and teams from their user accounts – not the Launchpad.



To get started, click into the strategy you would like to add an assignment to and select **Assign**.

Select the capability you would like to assign resources from. Please note, when assigning you must select one option at a time. Select between Coach, Events, or CxZone.

After selecting the capability you would like to assign click **Next Step**.

If you click Coach, you will be asked to select between Scenarios, Field Coaching and Certifications. You can select more than one.

The assignment wizard walks you through each step of creating an assignment. As you go through the wizard, please make sure to click **Save** and **Next Step** after each section you complete.

- **Essentials** – Enter the name, start and end date, and an optional description. The start and end date refer to the entire deployment initiative, not for when your resources are pushed out.
[If assigning an Event:](#)
- **Events** – Add Events to the assignment. You may assign immediately, or schedule them for later.
- **Notifications** – Select how to notify assignees and customize the email they receive. You can enable email, push, or in-app notifications.
- **Event Managers** – Event Managers are other platform administrators who can manage an event – meaning, deploy it to end-users. Default Admin, Manager, and Draft Managers can fulfill the role of Event Manager.
[If assigning Coaching:](#)
- **Scenarios, Certifications, Field Coaching** – Add Scenarios, Certifications, and/or Field Coaching to the assignment.

You may assign these immediately, or schedule for a later date and time.

- **Notifications** – Select how to notify assignees and customize the email they receive.
- **Proctors** – Select who to assign these coaching resources to. Default Admin, Manager, and Draft Managers will be able to fulfill the role of Proctor in most coaching initiatives.
[If assigning CxZone:](#)
- Select between **Practice or Certification Mode**.
- **CxZone** – Add the practice or certification. Assign immediately or schedule for later.
- **Notifications** – Select how to notify assignees and customize the email they receive.
- **Evaluation Managers (for Practices)** – Filter managers by team. Remove managers you do not want to add. End-users under each manager show up here under **Select Users for Assignment**. Click **Add** to push the practice out to each user or click **Add All** to add all the users.
- **Access. Management (for Certifications)** – Filter managers by team. Click **Select Users** to select users who will get access.

How to Edit a Deployment or Assignment

Click **More Options** next to a deployment or assignment to access the options menu, and see what additional actions you can take with the deployment or assignment.

Deployed

Assigned

Q Search

Create Deployment

↕

⌵

Deployment Name	Start Date	End Date	Tools	Status	
Journey 2024	29/03/2024	30/06/2024		Deployed 	...

View – Overview of deployment or assignment. Includes resources deployed and to whom. Here you can also set up **Automated Reminders** and **Manager Reports**. You can also restart training, deploy ActionPacks added to the Learning Set, and deploy the training to additional learners.

Duplicate – Duplicate the deployment or assignment. This allows you to recreate and edit it without needing to re-add resources or audience.

Edit – Edit the deployment or assignment details.

Copy Link – Create a shareable link for individuals who already have access to this content.

Move – Move the deployment or assignment from one strategy to another.

Learn Reminder – Send a Learn reminder. You can filter by **All**, **Not Started**, and **Not Completed** and send email, in-app, or push notifications.

Send Welcome Reminder – Resend a welcome email to users who have not yet logged in.

Delete – Delete the deployment or assignment.

Audience Deployment Report – Click the download icon under the Status column to download an audience deployment or assignment report.

How to Restart Existing Learn Deployments

Once training has been deployed, you may restart Learning Sets and ActionPacks for individuals. You may also deploy new ActionPacks that have been added to an already deployed Learning Set. This makes it easy to deploy updated content – within the same Learning Set – without needing to create a new deployment.

Click **Restart All** to restart all the Learning Sets and ActionPacks in the deployment.

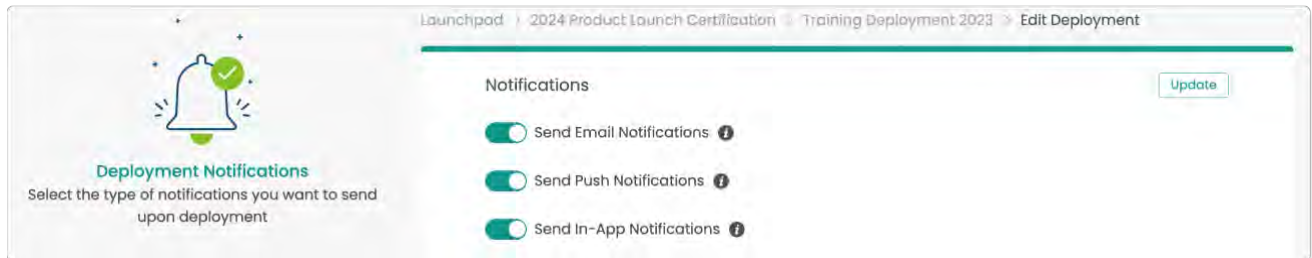
Click **Restart** to restart a specific Learning Set. When you select either option, you can still select which specific ActionPacks you would like to restart.

Click **Deploy** to deploy ActionPacks that have been added to Learning Sets after initial deployment. Please note that this deploys to the same audience that initially received it. If you are planning to add new training to existing Learning Sets, please make sure to set due dates as a range.

How to Customize Deployment or Assignment Emails and Notifications

You can manage notifications for deployments and assignments, and customize the emails you send out to recipients. These can be found in the wizard when you are building out a deployment or assignment.

How to Manage Notifications



- **Send Email Notifications** – Allows administrators to decide if learners need an email notification associated with the deployment. The email may be customized – see more below.
- **Send Push Notifications** – This allows administrators to decide if learners need a push notification associated with the deployment on their iOS device.
- **Send In-App Notifications** – This allows administrators to decide if learners need an in app notification associated with the deployment.

How to Customize Deployment and Assignment Emails

When you enable email notifications, you can customize the default email that users receive. This allows administrators to change the default email message to recipients. according to their needs.



- You can customize both the subject and the body of a deployment or assignment email.
- Click **Available Variables** to see what variables are available in the email.
- Click **Aa** to expand the text box to use the available rich text format. Click **Send Test Email** to send a test email to see what the email will look like.
- Click **Send Test Email** to send yourself a test email to see what it will look like for the recipient.

How to Edit or Complete a Strategy

A launch strategy may be edited, completed, or deleted. Once **Complete Strategy** is selected, the strategy cannot be updated. It will be marked as complete – no further deployments/assignments may be added to it.

2024 Product Launch Certification

Click Complete Strategy to mark the strategy as complete.

PRODUCT	CREATED ON	STRATEGY TYPE	START DATE	END DATE	CREATED BY
Medactine	01/01/2024	New Coaching Prog...	31/12/2023	30/12/2024	Fiona Harrison

Complete Strategy

PROTIP If you delete a strategy, deployments and assignments in that strategy will be deleted. Users will no longer have access to this content, and all related data and analytics will be deleted as well.

How to Generate Shareable Links for Deployments

Shareable links are direct links to content that has already been deployed to end-users. Shareable links may be generated for deployments.

You can copy links to individual deployments by clicking **More Options** *** on the right of the deployment and selecting **Copy Link**. Please note, the link recipient(s) must already have access to this content.

Deployment Name	Start Date	End Date	Tools	...
New Hire Onboarding 20220404	04/04/2022	31/12/2022		

What are Automated Deployment Reminders?

Within deployments, you can set up automated reminders. Click into a deployment and select **Automated Reminders**. Automated reminders are set up to follow up with learners on a specific cadence, and remind them to complete their deployed training.

Reminder Name

Select Audience

Select

When to send

Select

☐ Email Notifications ⓘ

☐ Push Notifications ⓘ

☐ In-App Notifications ⓘ

Reminder Name – Enter a reminder name (255 character limit)

Select Audience – Select the target audience. Choose between **Not Started**, **In Progress**, and **Overdue** learners from the dropdown.

When to send – Select **Month**, **Week**, or **Day** from the dropdown. In the text field on the left, input a number. This will send a reminder, for example, 2 days/weeks/months before the due date.

Notifications – Toggle **Email**, **Push**, or **In-App** Notifications on to select what kind of notification(s) learners receive at the selected cadence.

Deployed Content Access Management (DCAM)

Deployed Content Access Management (DCAM) allows platform administrators to control a learner's access to previously deployed content without removing the learner from the deployment, or losing their historical data.

Using DCAM, administrators can zoom out to the Strategy or Deployment level, or drill down to a Learning Set, ActionPack, or Collection level and revoke access to just those individuals for whom that specific content is no longer relevant. And, if one or more learners need to access that content again at any point, it's just as easy to restore access to right where they left off.

Access DCAM through [Setup > User Management > Learner Name > Deployment Details](#). Within each learner's deployment details, access to content can be revoked, and if applicable, restored.

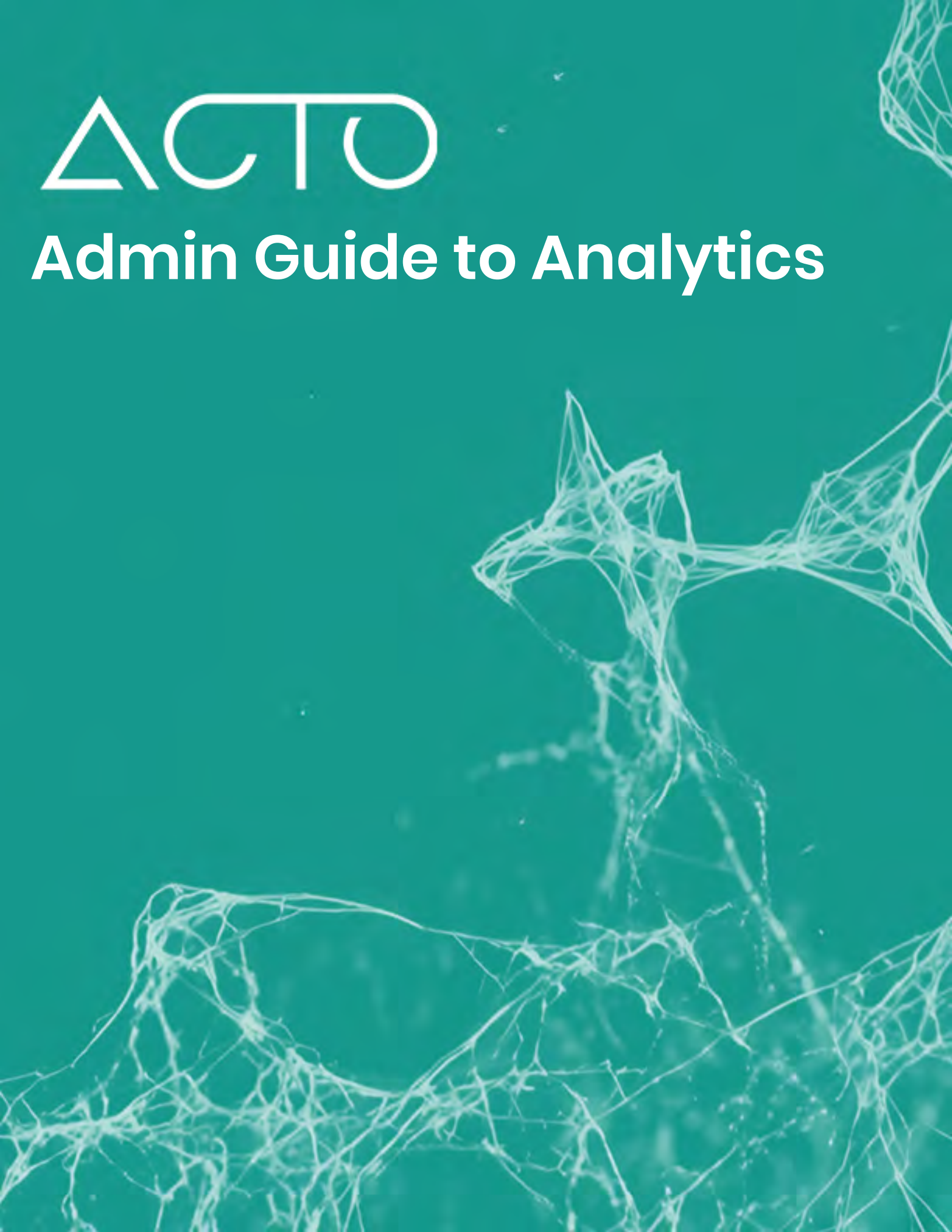
The screenshot shows the 'User Deployment Details' interface. At the top, there's a search bar and several action buttons: 'Revoke' (red), 'Ignore' (light blue), 'Expand all' (teal), 'Collapse all' (teal), and 'Download Report' (teal). Below these is a table with columns: STRATEGY, TYPE, and LAUNCH DATE. The first row shows '2025 Product Training' (checked), 'New Hire Onboarding', and '2025-06-02'. Below this is another table with columns: DEPLOYMENT, START DATE, END DATE, TOOLS, and PERSONA. The first row shows 'ABDO Deployment', '2025-06-02', '2025-06-29', a gear icon, and 'Learner'. Below this is a 'LEARNING SET' section with a table containing 'Level 1: ABDO-Stitch® System Curriculum'. At the bottom is an 'ACTIONPACK™' section with columns: COMPLETION %, CERTIFICATION, RESOURCE INTERACTIONS, DUE DATE, DEPLOYMENT DATE, and LAST ACTIVITY. The first row shows 'Day 1: ABDO-Stitch® Foundations'.

PROTIP Hierarchical Deployment Details allow you to drill down and multi-select different levels of content, and revoke or restore multiple resources at once. Revoked content is greyed out, but still visible.

When you view a deployment in Launchpad, you will still see all the users the content was deployed to. If it has been revoked for a specific learner, that person will have revoked next to their name.

The screenshot shows a user list interface. At the top, there's a search bar and a button '+ Add Audience'. Below this is a table with columns: Name, and a status column. The first row shows 'Elena Alda (foriba+elena@actoapp.com)' with a 'Revoked' status. The 'Revoked' status is indicated by a red icon and the word 'Revoked' in red text.

[Click back to Admin Guide to Launchpad Table of Contents](#)

The background is a solid teal color. It is decorated with several white spider webs. One web is in the top right corner, another is in the middle right, and a large, dense web is in the bottom left and center. The webs are made of thin, white, tangled lines.

ACTO

Admin Guide to Analytics



Admin Guide to Analytics

ACTO's **Report Generator** and **Analytics Dashboards** allows administrators to generate custom up-to-date reports on end-user engagement with platform tools like Learn, Coach, and Resources – and consolidate that data into powerful reporting dashboards to derive actionable insights.

Click into any of the links below to get started.

Table of Contents

1. [Report Generator Learning Objectives](#)
2. [How to Access the Report Generator](#)
3. [The Report Generator Quick Overview](#)
4. [The Report Generator Homepage](#)
5. [How to Generate a Report](#)
6. [How to Customize Reports](#)
7. [How to Export Digital Signatures from a Learning Report](#)
8. [How to Download a Report](#)
9. [How to Schedule a Report](#)
10. [The Report Generator FAQs](#)
11. [The Report Generator List of Reports](#)
12. [Admin Guide to Embedded Reports](#)
13. [How to Access User Management](#)
14. [Embedded Reports Quick Overview](#)
15. [How to Access the User Analytics Dashboard](#)
16. [How to Access the Team Analytics Dashboard](#)
17. [How to Access the Content Utilization Dashboard](#)
18. [Admin Guide to Manager Insights Dashboards](#)

ACTO

Admin Guide to the Report Generator

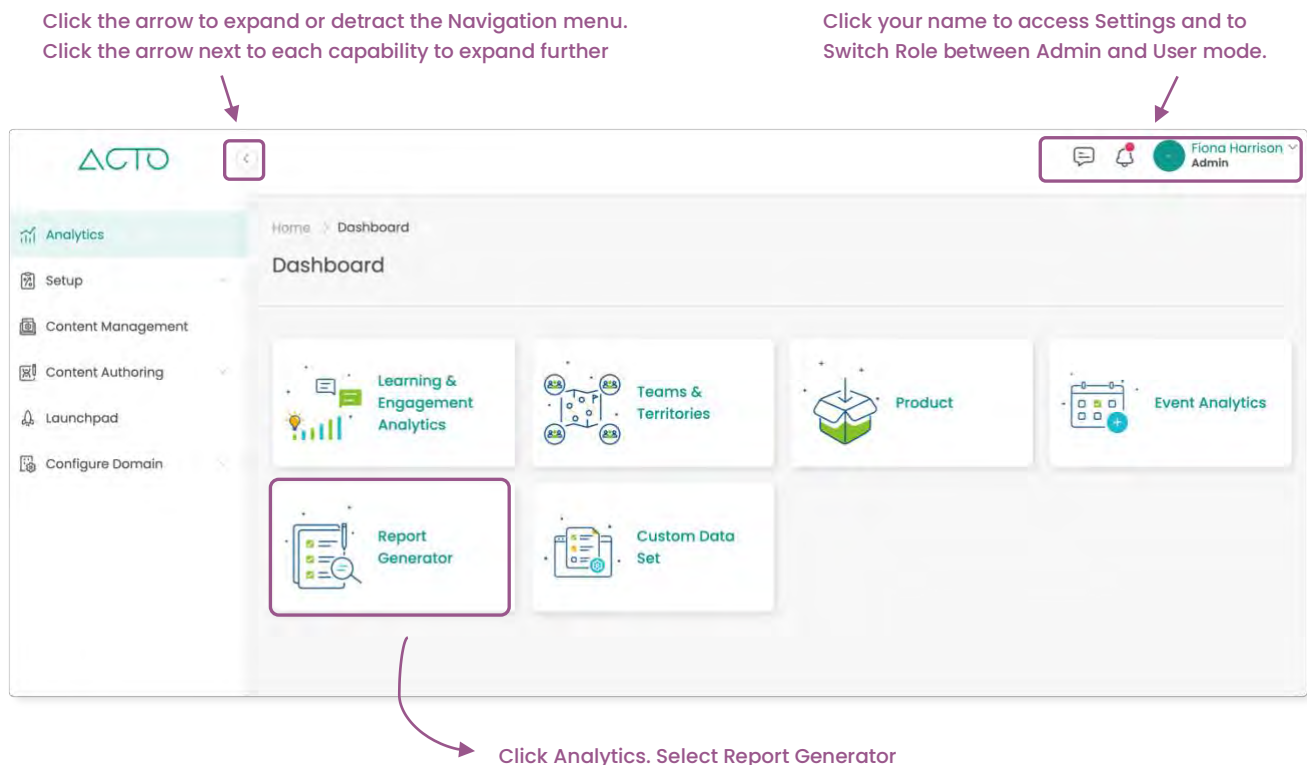
Report Generator Learning Objectives

- Understand how to access the Report Generator
- Understand how to generate, export, and schedule reports
- Learn about the different types of reports that can be generated

How to Access the Report Generator

The Owner, Admin, Manager, and Draft Manager default administrative roles on ACTO can access the Report Generator. **Currently, report visibility is limited to the individual who generated a particular report.**

NOTE – Permissions for different administrative roles can be updated or customized on a role-by-role or on an individual basis in ACTO's User Management System.



1. Log in to ACTO on your computer browser. **Please use Google Chrome or Mozilla Firefox.**
2. Make sure you are in administrative mode. End-users cannot access admin functionality.
3. Expand the **Navigation menu** on the left of your screen.
4. Click **Analytics** and then select the **Report Generator** tab.

The Report Generator Quick Overview

- The Report Generator allows you to **generate and download** custom reports. These reports may be generated for data within ACTO's capabilities including **Learn, Resources, and Coach**.
- You may **customize** column names in your reports to ensure that they align with your organization's internal terms and language.
- You may **filter** reports using filters like User, Team, ActionPack, Learning Set, Collection, Resources, Tags, and more to narrow down to the most critical information.
- You may **Organize** reports into folders or pin them for easy access.
- You may **Export** reports as CSV or Excel files to conduct deeper analyses on your data.
- You may **Schedule** reports and get them delivered into your email inbox at the frequency you chose.

The Report Generator Homepage

The Report Generator allows you to generate new reports, create a folder structure for your reports, export and download reports in .csv and .xls format, and schedule reports.

Click the **Reports**, **Folder**, and **Scheduled** tabs to navigate through the Report Generator.

Click **Create New Report** to create a new report. Click the **Filter** icon to filter your reports by Folder, Created on, Updated on, Tool, and Scheduled.

The screenshot shows the Report Generator interface. At the top, there are three tabs: 'Reports', 'Folder', and 'Scheduled'. A box highlights these tabs with an arrow pointing to the text 'Click the Reports, Folder, and Scheduled tabs to navigate through the Report Generator.' To the right, there is a 'Create New Report' button and a filter icon. An arrow points to the filter icon with the text 'Click the Filter icon to filter your reports by Folder, Created on, Updated on, Tool, and Scheduled.' Below the tabs, there is a search bar and a dropdown menu labeled 'Reports (2)' with 'All Reports' selected. An arrow points to the dropdown with the text 'Click the dropdown arrow to filter by All Reports and Pinned Reports.' Below the search bar, there is a table with columns: NAME, FOLDER, CREATED ON, UPDATED ON, TOOL, STATUS, and actions. The table contains two rows: 'NHO Detailed Quiz Report' and 'NHO Learning Report'. The 'NHO Learning Report' row has a pin icon highlighted with a box and an arrow pointing to the text 'Click the Pin icon to pin a report.' At the bottom right, there is a scroll bar and a button labeled '1'. An arrow points to the scroll bar with the text 'Scroll to see more columns'.

NAME	FOLDER	CREATED ON	UPDATED ON	TOOL	STATUS	
NHO Detailed Quiz Report	2024 Learn Report	24/02/2024 23:29	24/02/2024 23:30	Learn	Completed	Download ...
NHO Learning Report	2024 Learn Report	24/02/2024 23:27	24/02/2024 23:37	Learn	Completed	Download ...

PROTIP On the main reports page, hover over the Reports section and scroll to the right for more menu options including the Download button and the More icon ... that allows you to Rename, Edit, Export Digital Signatures, Rerun, Duplicate, Move, and Delete the report.

PROTIP Before creating a new report, click Folder from the Reports Homepage to the folder(s) that will house and organize your reports. When creating a new report, you will need to select the folder it lives in.

How to Generate a Report

The reports in the Report Generator provide insights related to one of ACTO's core tools: **Learn**, **Resources**, and **Coach**. To get started, click [Create New Report](#) from the **Report Generator** home page. This takes you to the Report Generator wizard. Please enter information in the Essentials, Tool Selection, and Filters sections.

1. How to Create a New Report: Essentials Section

Please click **Save** as you proceed through each step of the wizard. If you do not, your entered information will not be saved.

Report Essentials
Name and categorize the report

Essentials
Tool Selection
Filters

Next Step

Basic Information

Name

Description

Folder Name

Select Folder

Report Format

CSV XLSX

Select your preferred report format.

Click **Next Step** from the left-hand menu to move on to the next section of the wizard.

Select the folder the report will belong to. You will have already created a folder prior to this.

1. Enter the Report Name
2. Enter a description of the report – this field is optional
3. Select the folder in which the report will live. Click **Save** and **Next Step**.

2. How to Create a New Report: Tool Selection Section

Reporting Tool

Select

Reporting Type

Select

Save

1. Under **Reporting Tool**, select the Reporting tool your report is related to from the dropdown menu, i.e., **Learn**.
2. Under **Reporting Type**, select the specific report type you would like to generate. Click **Save** and **Next Step**.
3. To view the types of reports you may generate, please reference [The Report Generator List of Reports](#).

3. How to Create a New Report: Filters Section

After selecting a report type, you may drill down further by creating filters and customizing your columns in each report. Once your filters and columns are set up, click **Save & Run** from the wizard menu to run the report. Once a report is generated, you may select the Download option from the main Reports page to access it.

Filters

Add Filter ▼

Click the Checkboxes under the visibility column to show or hide a certain column in your final report.

COLUMN NAME	PREFERRED NAME	VISIBILITY
⋮ RESOURCE NAME		☒
⋮ COLLECTIONS		☒
⋮ DOWNLOADABLE		☒
⋮ FAVOURITABLE		☒
⋮ SHAREABLE		☒

Save

Add Filter filters the data down further. Each report has specific filters that can be applied to it like User, Team, ActionPack, Learning Set, Resource Type, Collection etc.

Reorder Columns - You may reorder columns in your report by clicking and dragging the three vertical dots next to each.

Rename Columns - You may rename columns to your preferred nomenclature.

How to Customize Reports

- Remove columns within a report to remove data that is not relevant to your needs.
- Rename columns within a report to better fit in with your company's naming conventions.
- Reorder columns within a report to customize the way information is presented in the report.
- Filter reports using filters like user and team to view the specific data you would like to see.

How to Export Digital Signatures from a Learning Report

Learning Reports capture details on user engagement with ActionPacks or Learning Sets, including submitted Digital Signatures. After running a Learning Report, click the **More Options** icon *** on the right of the report from the main Reports page. Select **Export Digital Signatures**. Click into Notifications to download the signatures.

Reports (2) All Reports

NAME	FOLDER	CREATED ON	UPDATED ON	TOOL	STATUS	
NHO Detailed Quiz Report	2024 Learn Report	24/02/2024 23:29	24/02/2024 23:30	Learn	Completed	Download
NHO Learning Report	2024 Learn Report	24/02/2024 23:27	24/02/2024 23:37	Learn	Completed	Download

More Options (***):

- Rename
- Edit
- Export Digital Signatures
- Re run
- Duplicate
- Move
- Delete

How to Download a Report

After running a report, you may request to download it from the main Reports page. Scroll to the right of the report you want to download, and click **Download**. You will receive a Notification on the top-right of the page once your report is ready. **Please note a download link will also be sent directly to your email address.**

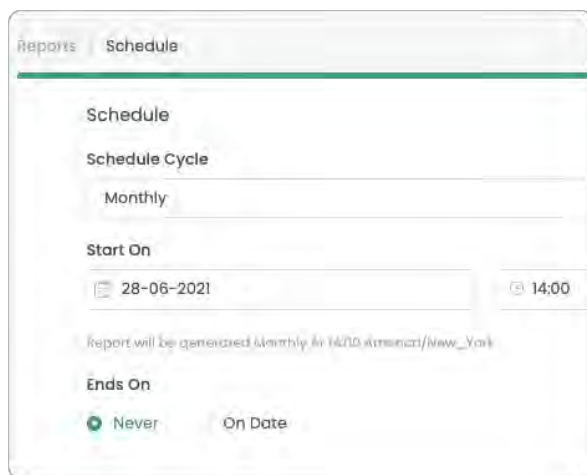


NAME	FOLDER	CREATED ON	UPDATED ON	TOOL	STATUS	
NHO Detailed Quiz Report	2024 Learn Report	24/02/2024 23:29	24/02/2024 23:30	Learn	Completed	Download ...
NHO Learning Report	2024 Learn Report	24/02/2024 23:27	24/02/2024 23:37	Learn	Completed	Download ...

PROTIP The **Status** column next to a report on the Reports main page allows administrators visibility into the report's progress. Generated reports will be **Queued**, **In Process**, **Completed**, or **Failed**. If a report has failed to run, you will see **Re-execute** next to the download icon, which will return you to the report's

How to Schedule a Report

After running a report, you may schedule a cadence at which the most current version of the report is emailed to you. Reports can be scheduled one-time, daily, weekly, monthly, or yearly. **Reports can also be emailed to multiple stakeholders.** [To receive scheduled reports, please make sure to enable your Email Notifications.](#)



Reports **Schedule**

Schedule

Schedule Cycle

Monthly

Start On

28-06-2021 14:00

Report will be generated Monthly for NHO (London/New_York)

Ends On

☒ Never ☐ On Date

1. Click the **Scheduled** tab within Reports. Click **Create New Schedule**. Enter the following details into the scheduler wizard:
2. **Essentials** – Enter the name and an optional description for your scheduled report.
3. **Reports** – Enter the name of the report or reports you would like to schedule.
4. **Schedule** – Select the schedule cycle from the following options: **One time**, **daily**, **weekly**, **monthly**, **yearly**, or **custom**.
5. **Recipients** – Select recipients and select a report format. You may send the report to yourself or yourself and other recipients.

The Report Generator FAQs

Can a report be pinned? Click the Pin icon to the left of a report on the Reports homepage to pin a report.

How can a report be re-run? Click the More Options icon *** to the right of any report. From here you may re-run, rename, edit, duplicate, move the report to a specific folder, or delete the report.

Why are folders not clickable? This functionality is not currently available.

Who can see the reports I generate? Currently, only you can view the reports you generate. To share a report with team members, please schedule the report and add them as a stakeholder. The report will be emailed to them at the cadence you select (one-time, daily, weekly, monthly, yearly).

Why do I see my report status as N/A? A report status of N/A means that this report was previously run under the older user interface, but not exported. To re-run the report, click the More Options icon on the far right of the report and select re-run.



The Report Generator List of Reports

This section provides a list of the reports that may be pulled from the Report Generator tool. This list is organized by the capability the particular report is associated with. Each report also lists out the columns and filters within the report. **Please note, you may unselect some of the available columns when running a report.**

Learn Reports

1. ActionPack Quiz Report

This report captures data related to a user's quiz results within an ActionPack.

Report Filters: Users, Teams, ActionPack, Learning Set

Report Columns: Name, Email, Due Date, Quiz, Attempt, Question, Expected Answer, Attempt Answer, Attempt Answer Status, Attempt Date

2. Aggregated ActionPack Report

This report provides a summary of user interaction with a specific ActionPack or Learning Set.

Report Filters: ActionPack, Learning Set, Tags, Competencies

Report Columns: Name, Learning Set, Description, Due Date, Deployed User Counts, Completed User Count, Average Progress (%), Average Time Spent, Average Quiz Grade, Average Resource Interaction Count, Tags, Competencies

3. Aggregated Quiz Report

This report captures all the details of a quiz taken by a user.

Report Filters: Users, Teams, ActionPack, Learning Set

Report Columns: Name, Email, Learning Set, ActionPack, Due Date, ActionPack Status, ActionPack Completed Timestamp, Quiz, Avg Score, Max Score, Total Attempts, Time Spent (Seconds)

4. Detailed Quiz Report

This report provides a summary of a user's answers and grades for quizzes taken.

Report Filters: Users, ActionPack, Learning Set, Teams

Report Columns: Name, Email, ActionPack, Due Date, Quiz, Answers, Grade, Create Date

5. Learning Report

This report provides a summary of a user's progress in and engagement with any ActionPack or Learning Set. **With this report, you are able to select more than one strategy, deployment, and Learning Set at a time. In addition, once you run the report, you may also extract any digital signatures submitted by users.**

Report Filters: Users, Teams, Learning Set, ActionPack, Deployments, Strategies

Report Columns: Name, Email, Teams, Territories, Role, Time Zone, Strategy, Deployment, Learning Set, ActionPack(s) Included, Number of ActionPacks, Due Date, Progress (%), First Accessed, Last Accessed, Quiz Score, Time Spent, Resource Interactions, Last Activity Date, Survey Submitted, Poll Submitted, Signature Signed



6. Quiz Attempt Report

This report captures details of a user's quiz attempts, and can capture up to twenty attempts.

Report Filters: Users, ActionPack, Teams, Quiz

Report Columns: Name, Email, Learning Set, ActionPack, Due Date, ActionPack Status, Quiz, Quiz Passing Score, Attempt 1 (Time, Score) up to Attempt 20 (Time, Score)

7. Resource Interactions Report

This report captures the details of a user's interactions with resources within an ActionPack.

Report Filters: Learning Set, ActionPack, Topics, Resources

Report Columns: Name, Email, Teams, Territories, Role, Learning Set, ActionPack, Due Date, Topic, Lesson, Resource Name, Resource Type, Resource Interactions, Total Time Spent

8. Survey Report

This report provides a summary of a user's responses and options selected on a given survey.

Report Filters: Users, Teams, ActionPack, Learning Set

Report Columns: Name, Email, ActionPack, Due Date, Survey Name, Question, Question Type, Options, Answer

9. User Topic Report

This report provides a summary of a user's total time spent on and number of visits to a Topic, ActionPack, or Learning Set.

Report Filters: Users, ActionPack, Learning Set, Topics

Report Columns: Topic, User, Email, ActionPack, Learning Set, Due Date, Visits, Total Time Spent, Completion Status

Resources Reports

1. Content Utilization Report

This report captures data how content (resources and forms) is being utilized on the platform.

Report Filters: Collections, Content Management, Date Range

Report Columns: Content Name, Content Type, ActionPack Path, Content Management Folder Name, Content Management Folder Path, Collection Name, Collection Path, Is Expired, Expiration Date, Expected Time (Minutes), Last Accessed At

2. Most Viewed Report

This report provides a summary of any activity related to any specific resource type.

Report Filters: Resource Type, Resources, Collection

Report Columns: Resource Name, Collections, View Count, Users Viewed By Count, Average Time Spent, Total Time Spent

3. Resource Consumption Report

This report provides a summary of a user's interaction with a specific resource. This includes average and total time spent both for internal users, and (if applicable) external users.

Report Filters: Users, ActionPack, Learning Set, Topics

Report Columns: Resource Name, Collections, Downloadable, Favorite-able, Shareable, Share Count, Favorite-able Count, Average Time Spent (External), Total Time Spent (External), Average Time Spent (Internal), Total Time Spent (Internal), Created By, Updated By, Create Date, Update Date

4. User Activity Report

This report provides a summary of the activity that pertains to a particular user relating to resources.

Report Filters: Users, Teams

Report Columns: Name, Email, Teams, Share Count, Average Time Spent (External), Total Time Spent (External), Favorite-able Count, Average Time Spent (Internal), Total Time Spent (Internal)

5. User Resource Consumption Report

This report provides a summary of any given user's interaction with a specific resource or Collection type.

Report Filters: Users, Teams, Resources, Collections

Report Columns: User, Email, Teams, Resource Name, Collections, Share Count, Is Favorite, Visit Count, Average Time Spent, Total Time Spent, First Access Date, Last Access Date

Coach Reports

1. Aggregated Certification Report

This report captures aggregated data related to Certifications.

Report Filters: Users, Teams, Roles, Territories, Certifications

Report Columns: Username, Email, Mentor, Teams, Role User, Certification Name, Certification Deployment Timestamp, Certification Status, Total Score, Certificate Approved, Mentor Response Timestamp

2. Certification Report

This report captures user data related to Certifications.

Report Filters: Teams, Roles, Territories, Therapeutic Areas, Certifications, Users

Report Columns: Username, Email, Mentor, Teams, Role User, Certification Name, Certification Deployment Timestamp, Certification Status, Question, Response, Comment, Score, Certificate Approved, Number of Attempts, Mentor Response Timestamp, Tags, Competencies, Certification Completion Timestamp

3. User Field Coaching Report

This report captures user data related to Field Coaching.

Report Filters: Users, Teams, Field Coaching, Territories

Report Columns: Username, Email, Manager/Mentor, Teams, Role, Created By, Field Coaching Name, Session Date, Session Length, Number of Calls, Field Coaching Deployment Timestamp, Status, Attempt, Section Name, Question, Comments, Response, Manager Response Timestamp, Acknowledgement Required, Acknowledgement Timestamp, Tags, Competencies

4. User Scenario Report

This report captures data related to Coaching Scenario responses.

Report Filters: Teams, Roles, Territories, Therapeutic Areas

Report Columns: Username, Email, Mentor, Teams, Role, Created By, Scenario Title, Scenario Deployment Timestamp, Scenario Description, First Response Date and Comments, Second Response Date and Comments, Scenario Status

5. User Status Report

This report provides a summary of a user's status related to a Coaching Scenario.

Report Filters: Users, Teams, Scenarios, Territories

Report Columns: User, Email, Role, Scenario, Status, Status Update Date, Mentors, Mentor Teams, Conversation Start Date, Due Date, First Submission Date, Resubmission Requested Count, Last Reviewed By, Last Reviewed Date

6. User Field Coaching Pull-Through Report

This report captures data related to Field Coaching Pull-through resources.

Report Filters: Users, Teams, Field Coaching, Territories

Report Columns: Username, Email, Manager/ Mentor, Team, Role, Created By, Field Coaching Name, Session Date, Session length, Number of Calls, Field Coaching deployment time stamp, Status, Acknowledgement Required, Field Coaching Submission Timestamp, Pull-Through Type, Pull-Through Name, Pull-Through Review By Date, Pull-Through Status, Pull-Through User Review Time Stamp, Tags, Competencies

Administrative Reports

1. User Details Report

This report captures data related to any given user.

Report Filters: Users, Roles, Teams, Territories

Report Columns: First Name, Last Name, Email, Status, Last Activity Date, Teams, Territories, Role, Last Modified Date, Create Date, Devices

Gamification Reports

1. User Competency Report

This report captures data related to competencies.

Report Filters: ActionPack, Learning Set, Teams, Users

Report Columns: Name, Email, Teams, Rank, Product Knowledge, Clinical Fluency, Soft Skills, Selling Skills, Technical Skills, Compliance, Total Points.

Events Reports

1. Event Registration Report

This report captures the data entered on an Event Registration Form.

Report Filters: Users, Teams, Events

Report Columns: Name, Email, Teams, Event, Form Title, Question, Response, Registration Date

2. Leaderboard Report

This report captures the overall points earned by a user in the various point sources (ActionPack, resources, free scoring) before and during an event, narrowing down to a specific session.

Report Filters: Users, Teams, Sessions

Report Columns: Name, Email, Team, Event Name, Session, Points Source, Points Earned, Note

3. Poll Report

This report captures all the poll results available across multiple sessions in an event.

Report Filters: Users, Teams, Events

Report Columns: Name, User Email, Teams, Event, Session, Poll Name, Question Type, Question, Options, Answers

4. Pre-work Completion Report

This report captures the details around a user's prework/post-work for an event and sessions they attend.

Report Filters: Users, Teams, Sessions

Report Columns: Name, Email, Team, Event Name, Session Date, Session, Learning Set, ActionPack, Resources, Pre-work Completed %, Pre-work Completed Status, Quiz, Quiz Score, Polls, Surveys, Survey Status

Journey Reports

1. Overall Journey Report

This report captures the learners' overall progress within a Journey.

Report Filters: Journey, Learning Set, Collections, Quiz, Surveys

Report Columns: Number of deployed users, Journey name, Learning Sets within the Journey, Standalone ActionPacks within the Journey, Collections within the Journey, Resources within the Journey, Standalone Forms within the Journey, Number of Conditions, Percentage of users who passed adaptive quiz condition(s), Percentage of users who failed adaptive quiz condition(s), Percentage of users' survey option selected

ACTO

Admin Guide to Embedded Reports

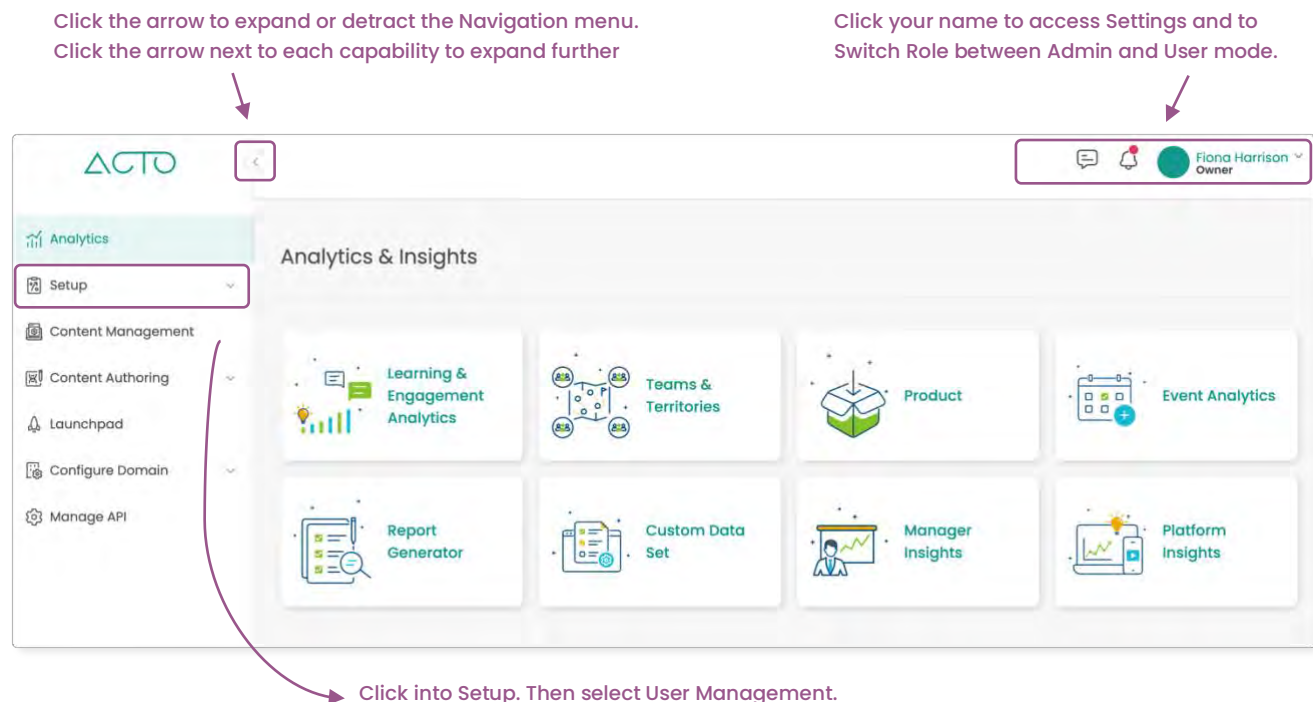
Learning Objectives

- Understand how to access Embedded Reports.
- Understand how to generate reports for individual users and teams.
- Learn about the different types of reports that may be generated.

How to Access User Management

Embedded reports are behind a feature flag. Please reach out to your Customer Success team member to discuss enabling this feature. Once enabled, permissions need to be set up in the User Management System.

NOTE - Permissions for different administrative roles can be updated or customized on a role-by-role or on an individual basis in ACTO's User Management System.



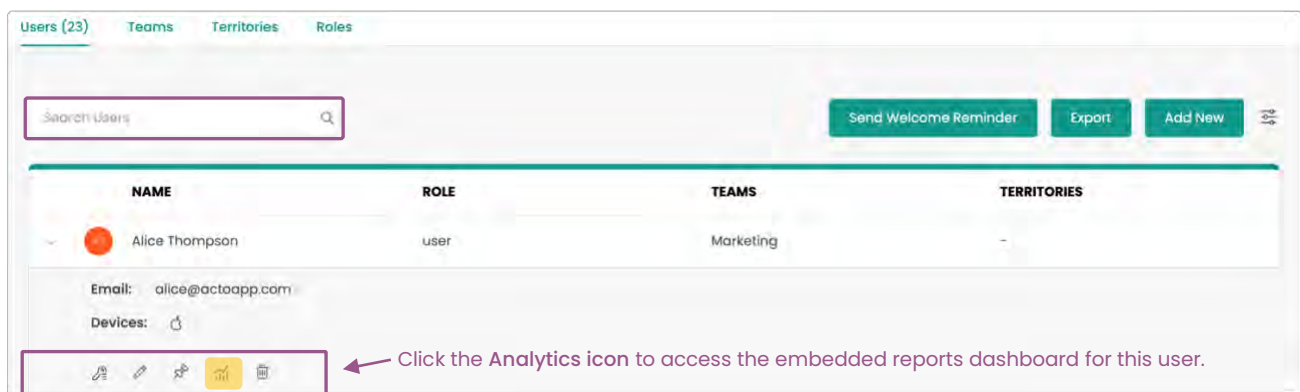
1. Log in to ACTO on your computer browser. Please use Google Chrome or Mozilla Firefox.
2. Make sure you are in administrative mode. End-users cannot access admin functionality.
3. Expand the **Navigation** menu on the left of your screen.
4. Click **Setup** and then select the **User Management** tab.

Embedded Reports Quick Overview

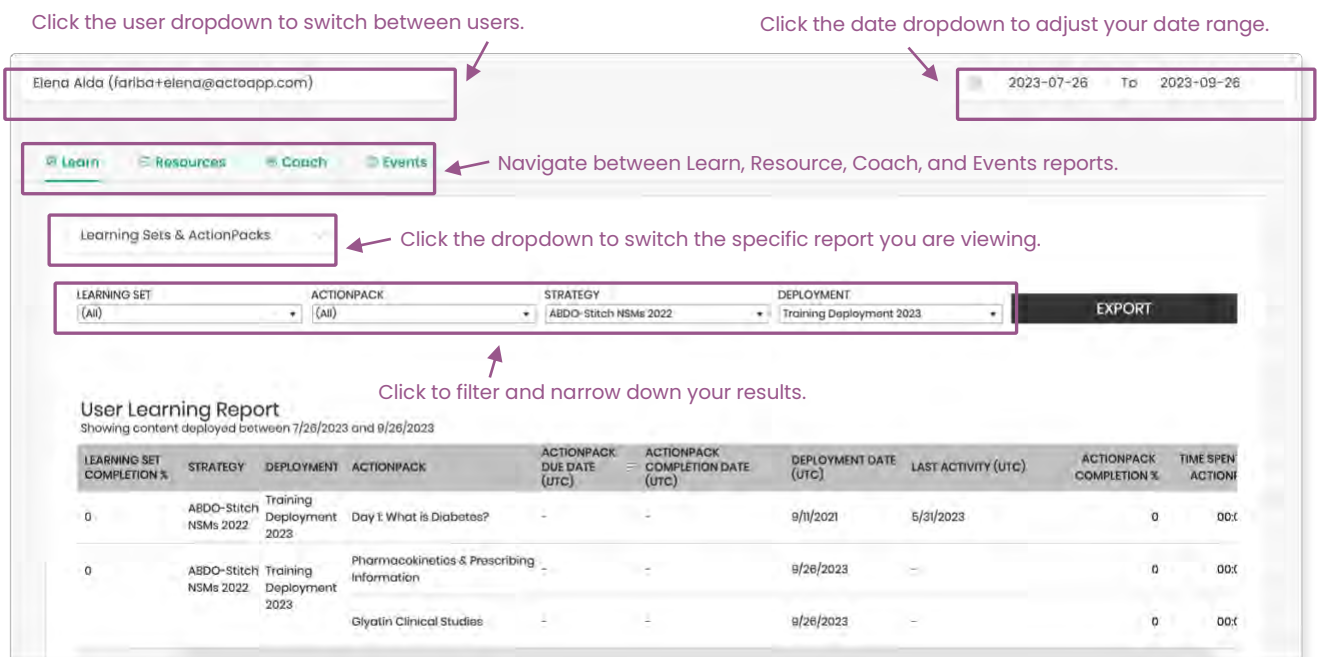
- Embedded Reports allow you to **generate and download** custom reports for users and teams. These reports may be generated for data within **Learn, Resources, Coach, Events, and Journeys**.
- Embedded can be accessed on an individual user and team level, and are found in the **User Management System**. The Content Utilization report can be found in the **Content Management System**.

How to Access the User Analytics Dashboard

Click into the User Management System, and then search for a specific user. Click the **Analytics** icon (as highlighted below) to access the embedded reports dashboard.

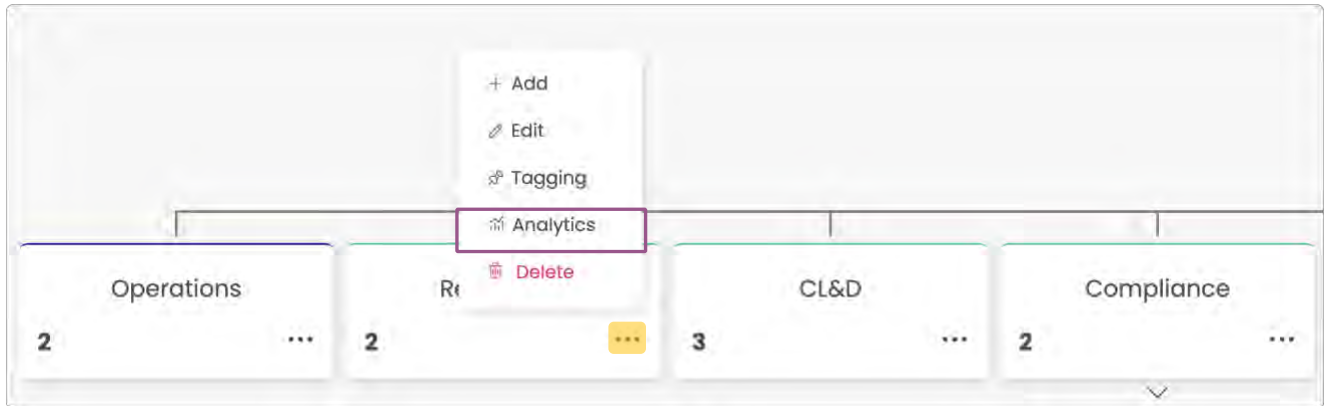


When you click into Analytics for any user, you will be taken to the page below. From here you can click between the **Learn, Resources, Coach, and Events** tabs to access the different available reports on a user level. Once you have navigated through the dropdown options, click **Export** to pull your report in Excel or csv format.



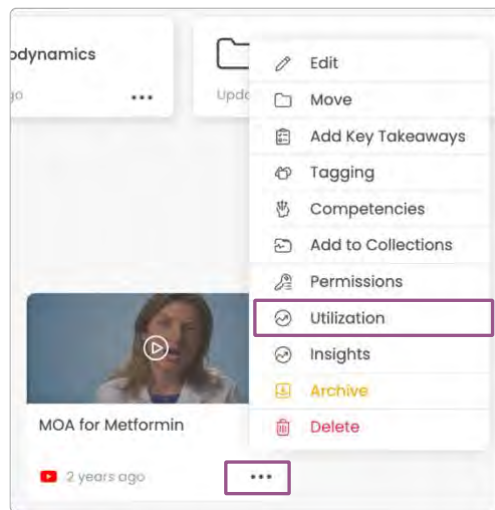
How to Access the Teams Analytics Dashboard

The Teams Analytics dashboard is similar to the User Analytics Dashboard, but it is accessed from the Teams page. Click into the User Management System, and then click into the **Teams** tab. Within teams, click the **More** icon (three dots) and then select **Analytics** to access the embedded reports dashboard.



How to Access the Content Utilization Dashboard

The Content Utilization Dashboard allows you to see how resources are utilized within **Learn** and **Collections**. To view this dashboard, click into Content Management.



Click into Content Management.

Navigate to a resource you would like to see the utilization dashboard for. Click the **More** icon (three dots) on right of the resource.

Select **Utilization**



[Click back to Admin Guide to Analytics Table of Contents](#)

Default Role Permissions Table

View All	View All allows Admin and Owner roles to view all the resources within a tool without needing to be specifically added as a stakeholder. For example, an Admin can view all the Learning Sets and ActionPacks within Learn, or resources within Content Management on a domain.
View	View allows administrative roles on the platform to View the resources or tools that they create, or have been shared with them – i.e., the resources they have been added to as Stakeholders.

	Owner	Admin	Manager	Draft-Manager	Drafter	User
Learn						
View All	✓	✓				
View	✓	✓	✓	✓	✓	
ActionPack						
Create	✓	✓		✓	✓	
Learning Set						
Create	✓	✓		✓	✓	
Category						
Create	✓	✓		✓	✓	
User Management						
View	✓	✓	✓	✓		
Team						
Create	✓	✓	✓	✓		
Update	✓	✓	✓	✓		
Delete	✓	✓	✓	✓		
Analytics						
Territory						
Create	✓	✓	✓	✓		
Update	✓	✓	✓	✓		
Delete	✓	✓	✓	✓		
Role						
Create	✓	✓				
Update	✓	✓				
Delete	✓	✓				
User						
Create	✓	✓	✓	✓		
Update	✓	✓	✓	✓		
Delete	✓	✓	✓	✓		
Analytics						
Content Management						
View	✓	✓		✓	✓	
View All	✓	✓				
Utilization						

Survey Dashboard						
View						
Download						
Poll Dashboard						
View						
Download						
Digital Signature Dashboard						
View						
Download						
Quiz Dashboard						
View						
Resource Dashboard						
View						
Resources						
View	✓	✓	✓	✓	✓	
View All	✓	✓				
Collections						
Create	✓	✓		✓	✓	
Events						
View All	✓	✓				
View	✓	✓	✓	✓	✓	
Create	✓	✓				
Manager	✓	✓	✓	✓		
Launchpad						
View All	✓	✓				
View	✓	✓		✓	✓	
Coach						
View	✓	✓	✓	✓	✓	
Scenario						
View	✓	✓	✓	✓	✓	
View All	✓	✓				
Assign	✓	✓		✓		
Mentor	✓	✓	✓	✓		
Start Conversation	✓	✓	✓	✓		
Certifications						
View	✓	✓	✓	✓	✓	
View All	✓	✓				
Start Certification	✓	✓	✓			
Field Coaching						
View	✓	✓	✓	✓	✓	
View All	✓	✓				
Start Field Coaching	✓	✓	✓			
FCR Dashboard						
View						

Object Management						
View	✓	✓				
Custom Field						
Create	✓	✓				
Update	✓	✓				
Delete	✓	✓				
Domain Setup						
View	✓	✓				
Analytics						
View	✓	✓	✓	✓	✓	
Manager Insights						
Platform Insights						
Report Generator						
View	✓	✓	✓	✓		
Custom Dashboard						
View						
Products						
View	✓	✓				
Create	✓					
Update	✓					
Delete	✓					
Clinical Data						
View	✓	✓				
Journeys						
View						
View All						
Competency Setup						
View	✓	✓	✓	✓	✓	
Create	✓	✓				
Update	✓	✓				
Delete	✓	✓				
Reminders						
Welcome	✓	✓				
Learn	✓	✓				

[Click back to Admin Guide to ACTO Table of Contents](#)

ACTO Supported Files and Formats

This reference guide provides you with file upload limits, image formatting best practices, character limits, and the supported languages on the ACTO platform.

Resource Upload Limits

File limits exist in ACTO to ensure maximum performance of the application and an optimal user experience across multiple devices. **Files larger than the recommended limits may impact the overall user experience.** If you need to upload a file larger than the listed limits, please reach out to the ACTO Support Team.

Resource Type	File Type	Upload Limit
Document	PDF	50MB
Document	DOCX	50MB
Document	PPTX	50MB
Document	XLSX	50MB
Video	MOV	25GB
Video	MP4	25GB
Video	3GP	25GB
Video	AVI	25GB
Video	FLV	25GB
Video	MKV	25GB
Image	JPG/JPEG	50MB
Image	PNG	50MB
Audio	MP3	50MB
Audio	M4A	50MB
Audio	WAV	50MB
SCORM Supported SCORM Versions: SCORM 1.1, SCORM 1.2, SCORM 2004 (2nd, 3rd, & 4th editions), the Experience API ("xAPI", formerly "Tin Can API"), cmi5, LTI 1.1, and LTI 1.3.	ZIP	175MB

Aspect Ratio and Image Resolution

The **Aspect Ratio** of an image is its width in relation to its height. You may use the aspect ratio to understand the shape of an image. For example, an image with a 1:1 ratio has an equal width and height and is square shaped. Images that are 16:9 or 21:9 are rectangular shaped with a width that is longer than their height.

Image Resolution is the number of pixels per inch (PPI) in an image. A high-resolution image will be crisper and clearer but will be a larger file. A lower-resolution image will be smaller but also be less sharp. **Please keep this best practice in mind: An image should be at least 500 pixels in height so that there's sharpness and clarity for whatever image you upload. Its width will correspond to whatever aspect ratio you have set.**

Resource Type	Optimal Aspect Ratio	Optimal Image Resolution
Domain Logo (Main Logo)	16:9	1920 x 1080 pixels or 1280 x 720 pixels
Domain Icon (Side Navigation Logo)	1:1	1080 x 1080 pixels
Learning Set Cover Image	21:9	1260 x 540 pixels
ActionPack Cover Image	16:9	1920 x 1080 pixels or 1280 x 720 pixels
Collection Cover Image	1:1	1080 x 1080 pixels
Event Cover Image	21:9	1260 x 540 pixels
Resources Thumbnail Image	21:9	1260 x 540 pixels

Character Limits

The table below lists character limits – text and spaces – across various platform tools. Character limits exist so that end-users can have a consistent experience on whatever device they use to access the platform.

Tool	Text Area	Character Limit
Content Management	Folder Name	100
Content Management	Resource Name	200
Content Management	Forms – Quiz Name	200
Content Management	Forms – Quiz Question and Answer Options	500
Content Management	Forms – Survey Name	200
Content Management	Forms – Survey Description w/Rich Text Support	5,000
Content Management	Forms – Survey Question & Answer	5,000
Content Management	Forms – Digital Signature Name	100
Content Management	Forms – Digital Signature Text	500
Content Management	Forms – Poll Name	200
Content Management	Forms – Poll Description	500
Content Management	Forms – Poll Question and Answer Options	200
Content Management	Forms – FCR Name	200
Content Management	Forms – FCR Description	5,000
Content Management	Forms – FCR Section Details	500
Content Management	Forms – FCR Question Fields (All types)	5,000
Content Management	Forms – FCR Answer Fields (All types)	5,000
Content Management	Forms – Evaluation Description Fields	5,000
Content Management	Forms – Registration Form Question and Answers	200
Content Management	Forms – Evaluation Form Question and Answers	200
Content Management	Forms – Evaluation Form Description	5,000
Content Management	Forms – Assessment Form Question	500
Content Management	Forms – Assessment Form Answer Options	200
Content Management	Forms – Assessment Form Description	5,000
Content Management	Forms – Coach Tools Evaluation Description	500
Learn – VILT	VILT Name	250
Learn – VILT	VILT Description	500
Learn	Learning Set Name	255
Learn	Learning Set Description	500
Learn	ActionPack Name	255
Learn	ActionPack Description	500
Learn	Category Name	255
Learn	ActionPack Topic Name	255
Learn	ActionPack Lesson Name	255
Resources	Collection Name	255
Coach – Scenarios	Scenario Name	200
Coach – Scenarios	Scenario Description	5,000
Coach – Certifications	Certification Name	200
Coach – Certifications	Certification Description	5,000
Events	Event Name	250
Events	Event Description	500

Supported Languages

Below is a list of languages supported by the ACTO platform.

Supported Languages
English
French
Spanish
Hindi
Portuguese
German
Chinese (Simplified)
Italian
Japanese
Russian
Thai
Vietnamese
Korean
Chinese Traditional (Taiwanese)
Dutch

[Click back to Admin Guide to ACTO Table of Contents](#)