ADMIN GUIDE

ACTO

Platform Admin Guide

Omnichannel Admin Guide

This is a full platform guide for ACTO Omnichannel administrators. **Administrator** refers to an individual who can access the platform's back-end, and has administrative permissions and capabilities. End users do not fall into this category. Administrator roles include default **Owner, Admin, Manager, Draft Manager,** and **Drafter** as well as any custom roles with administrative permissions. Click into the Default Role and Permissions Table to learn more about the platform's default user roles and associated permissions.

This document is organized into sections, each exploring core capabilities and features. The Table of Contents below links to each section within the document. Each section also has its own specific Table of Contents.

Click into any of the links below to get started!

Table of Contents

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.

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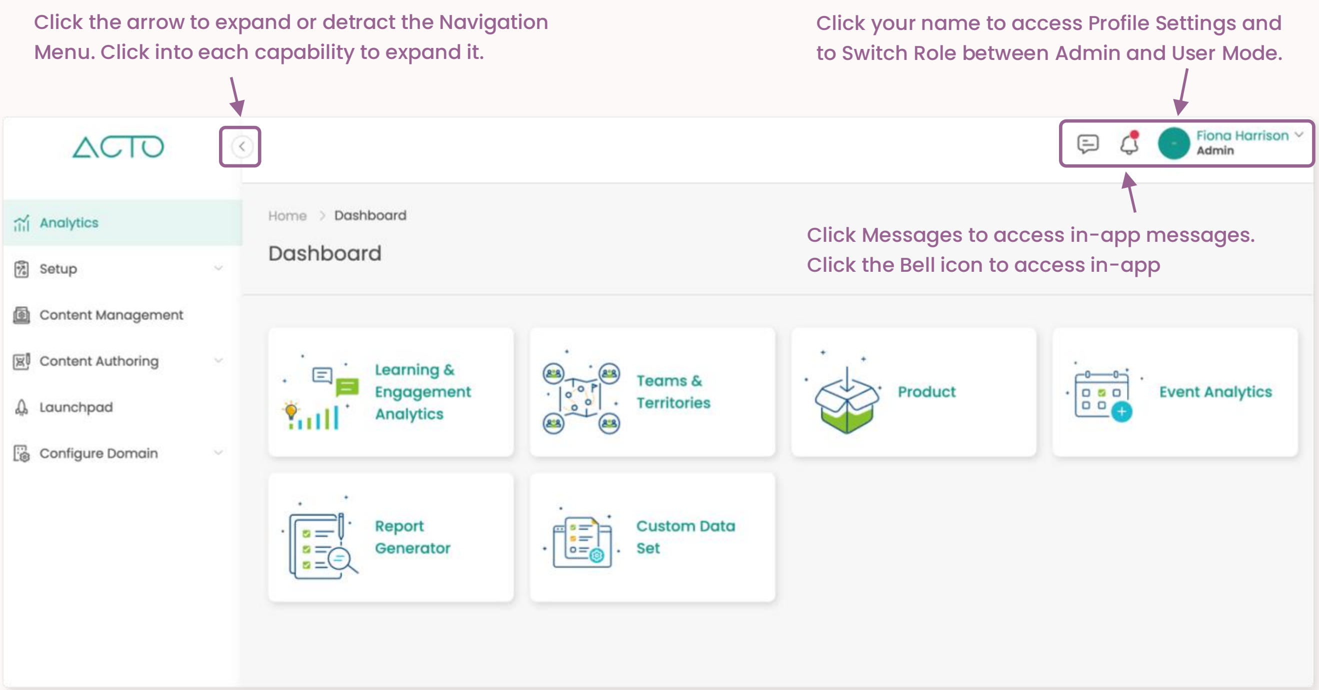
Admin Guide to Platform Essentials

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. <u>End-users cannot access admin functions.</u>
3. Expand the **Navigation menu** on the left of your screen and select an option.

Getting Started on ACTO Omnichannel

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.

Set up the company domain, including branding, core tool, and Notification → Replicate your org structure on the platform by the creation of teams and territories. → Add administrators and end-users. Organize them into teams / territories. → Add product and clinical tags to organize, categorize, search and report on

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 themselves.

While most administrative functionality is only accessible in administrative mode on a web browser, the Coach capability is an exception. Some coaching features require Managers to switch over to user mode on web, or use a mobile device, when pushing coaching to their teams. You can learn more in the sections on Coach.

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 change the nomenclature for behavior and competency.
- 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 Coach or Present capabilities.
- 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.

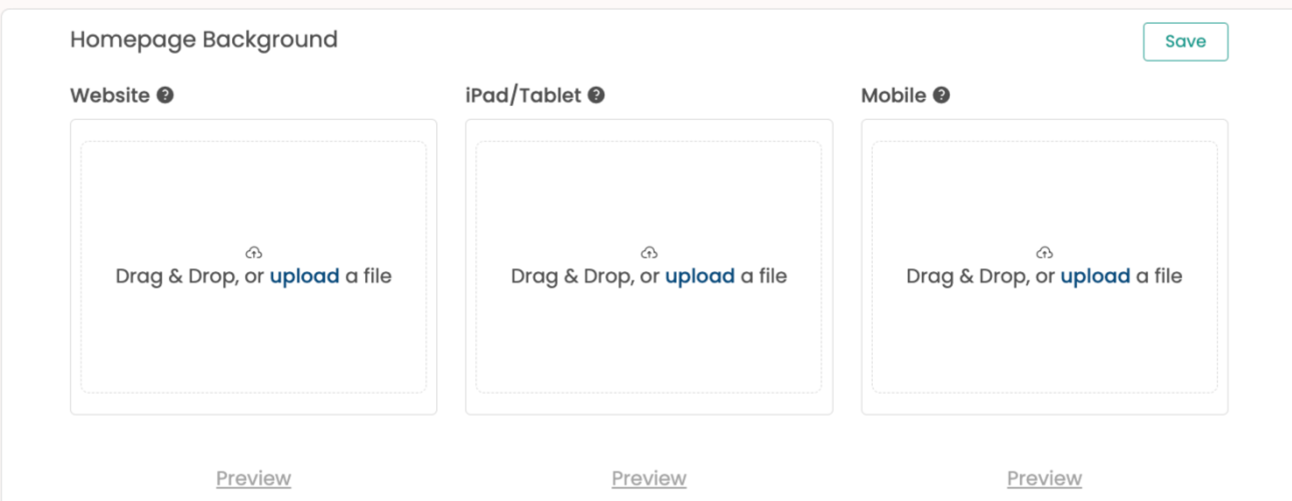
Configure Domain - Domain Setup

The section below provides instructions on navigating domain setup.

1. Click Configure Domain from the **Navigation menu**. Select Domain Setup.
2. Proceed through the Domain Setup wizard. Enter or edit information in the Domain Setup, Branding, and Settings sections.
3. Please click Save after each section to save your information. Click **Next Step** to move forward.
4. 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 the **Peer-to-Peer Messaging** checkbox to allow users to privately chat on ACTO's Messaging tool. *If you leave this 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.



Configure Domain – Taxonomy Settings

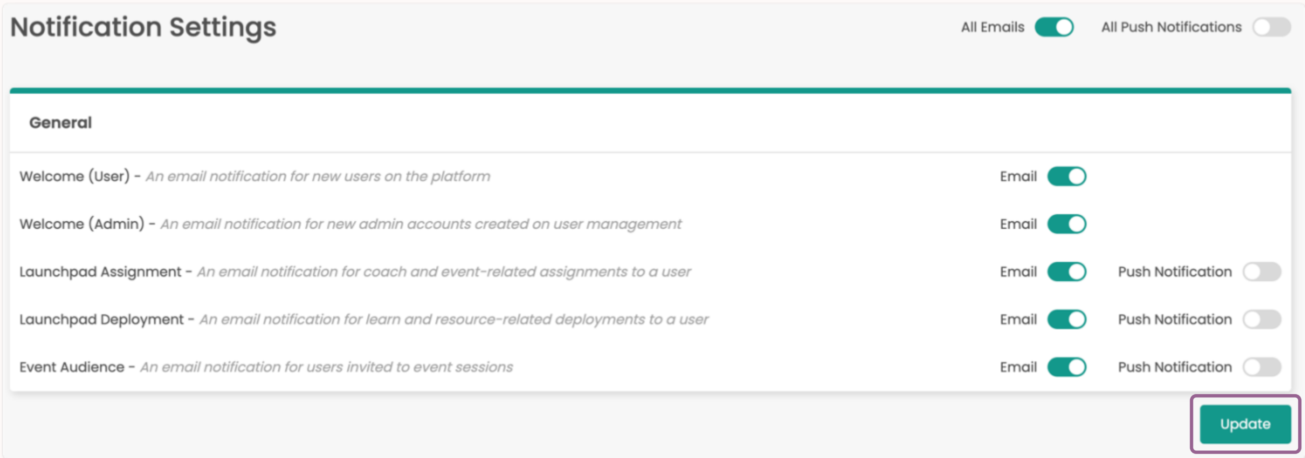
Taxonomy Settings allows admins to customize nomenclature on the platform related to learning competencies and behaviors. Click Configure Domain from the Navigation menu. Select Taxonomy Settings.

Configure Domain – Core Tool Settings

Core Tool Settings allows admins to enable or disable a user's ability to upload content from their devices into the Present or Coach tools. Click Configure Domain from the Navigation menu. Select Core Tool Settings.

Configure Domain – Notification Settings

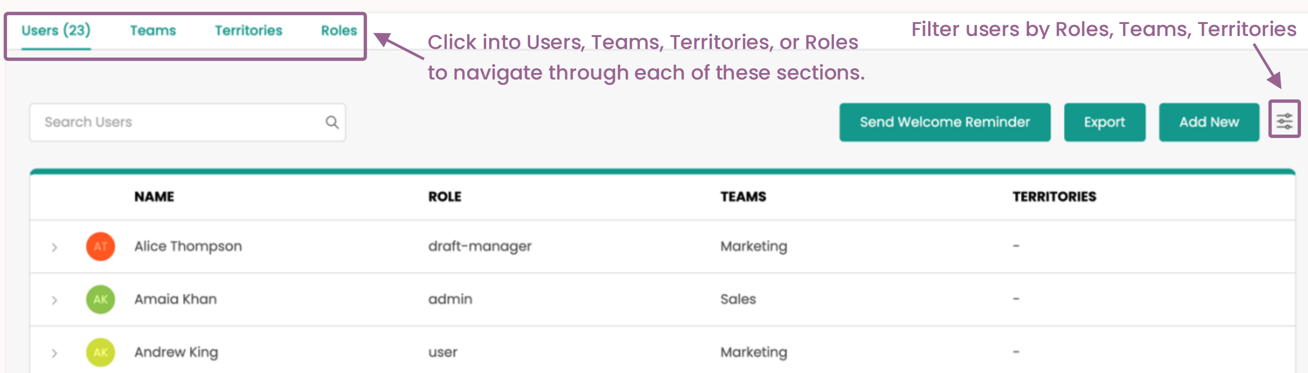
Notification Settings allows admins to enable or disable specific Email or Push Notifications for all users. Click Configure Domain from the Navigation menu and select Notification Settings to access this section. Use the toggle to enable or disable notifications, and then click Update to save your selections.



NOTE Even when All Emails is toggled off, and no email option is selected, the following five essential emails will still be sent: Magic Link, Verify Email, Forgot Domain, Reset Password, and MFA Verification Code.

Setup – User Management Overview

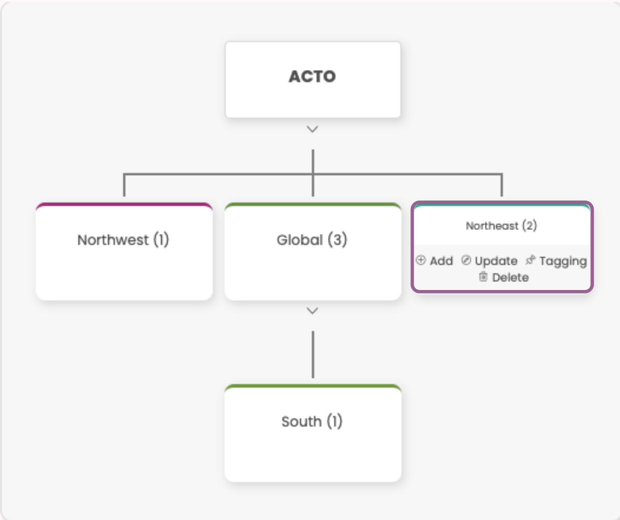
User Management on ACTO allows administrative roles to manage the users, teams, territories, and roles on the platform. Click Setup from the Navigation menu and select User Management. User Management provides a bird's-eye view of all users on the platform, their role, and the team and/or territory they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



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

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.



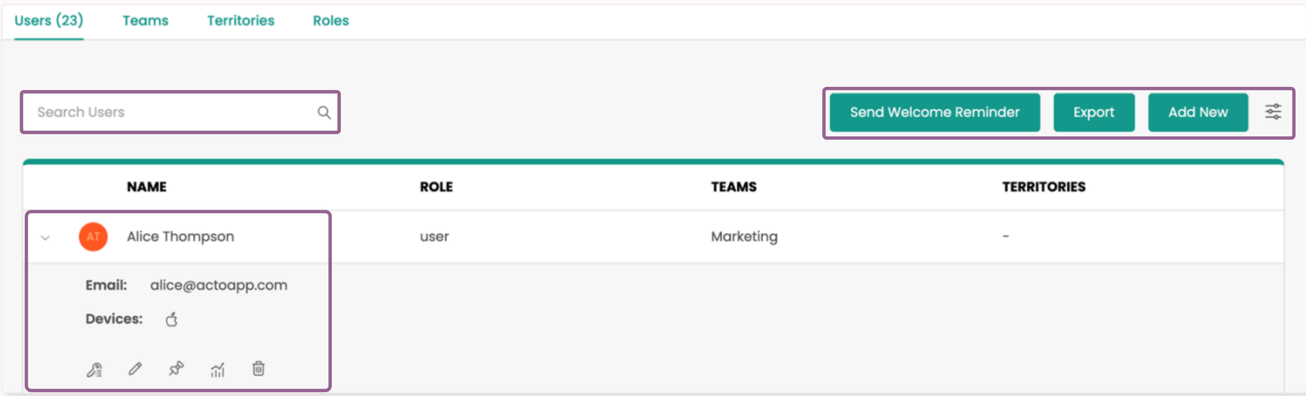
Add - Hover over a team/territory and click **Add** to add a team/territory below it, or on the same level. Add a new team/territory name, description, brand color, and select its parent (team that it falls under).

Update - Click Update to change a team/territory's name, description, color, or parent team/territory.

Tagging - Click Tagging to select keyword tags for the team or territory related to product, therapeutic area, disease state, or territory.

User Management – How to Add or Update Users

The Users section of User Management displays all the users in the system. You may add new users individually or in bulk by clicking the Add New button. Click into [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 this section.



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 dropdown arrow next to a user's name to view the options for that user.

- The Key icon allows you to modify user permissions.
- The Pencil icon allows you to update user details.
- The Pin icon allows you to add tags to a user profile.
- The Trashcan icon allows you to delete a user profile.
- The Graph icon gives you quick access to the details around what has been deployed to a user.

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

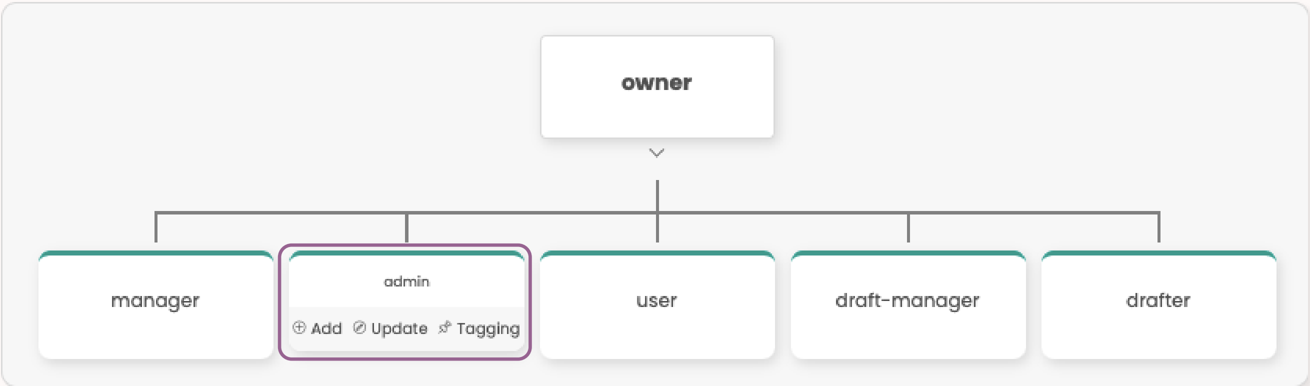
1. Click the Add New button on the top-right of the User Management homepage. Select Bulk Upload.
2. Create and upload an Excel sheet with the columns: First name, Last name, Email. Input users onto the sheet and upload it. You may also download the provided template, fill it out, and reupload it.
3. Click Upload Bulk Users to complete.

How to Add Individual New Users

1. Click the Add New button on the top-right of the User Management homepage. Select Create User.
2. Enter or select the following required information: User First and Last Name, Email address, Role, Team or Territory, and Language. Click Add User to complete.

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.



Add - Hover over a default role. Click Add to add a new role under or next to it. Enter the new role name, description, and parent role. Click the checkboxes under **Permissions** to customize permissions.

Update - Click Update to customize a default role's permissions. Default roles may have permissions changed, but not the role name itself.

Tagging - Click Tagging to select existing tags or to add keyword tags to associate with the role.

NOTE Default administrative roles may have their access permissions customized by clicking **Update**, but their names may not be changed. End-user permissions may not be customized.

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 permissions set out here may be customized on your domain.

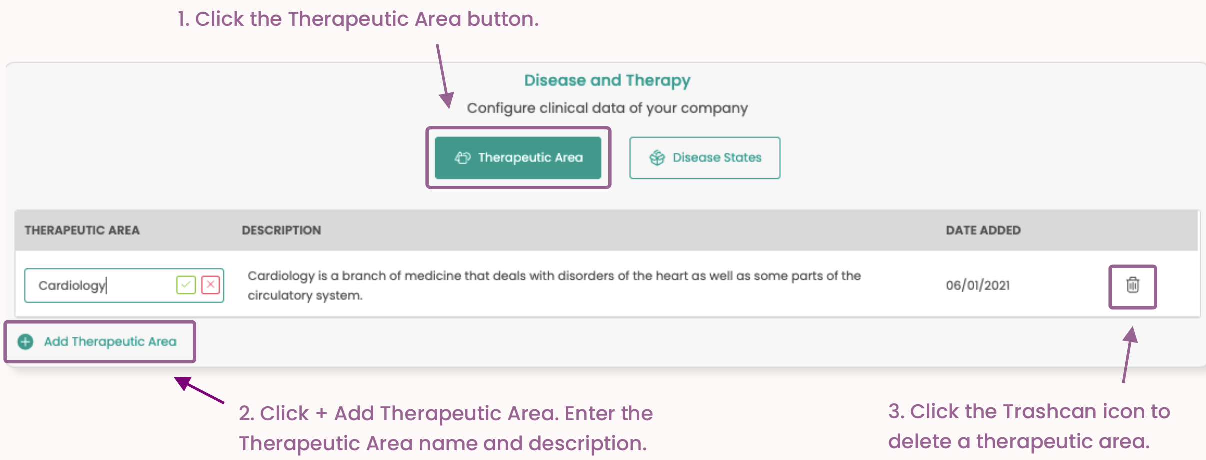
- **Owner** - Each domain has one Owner who has full visibility and access to all parts of the platform. The Owner role can only be changed by reaching out to ACTO's Support Team.
- **Admin** - Admins have full visibility into the system including content creation and user management.
- **Drafter** - Drafters have visibility into content creation and uploading, organizing, and sharing content.
- **Manager** - Managers have access to the User Management System and their specific 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

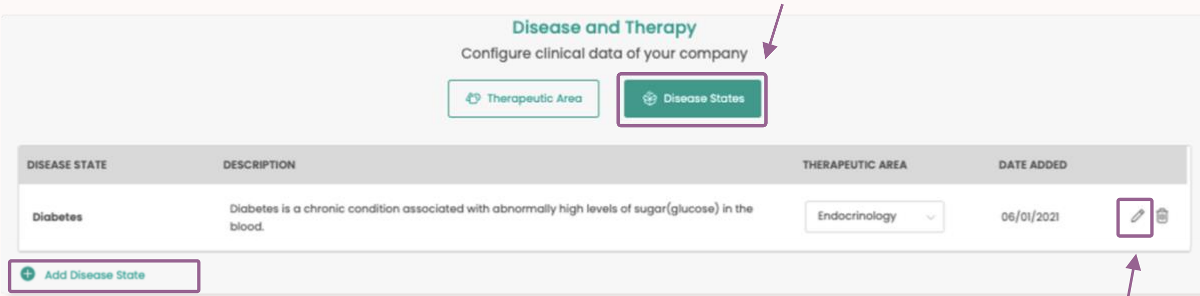
To get started, click Setup from the **Navigation menu** and select Clinical Data. Then click Therapeutic Area. Enter details in each section, and press the Green Checkbox or Enter Key to save the entered information. To edit or update a text field simply click into it.



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.

1. Click the Disease State button.



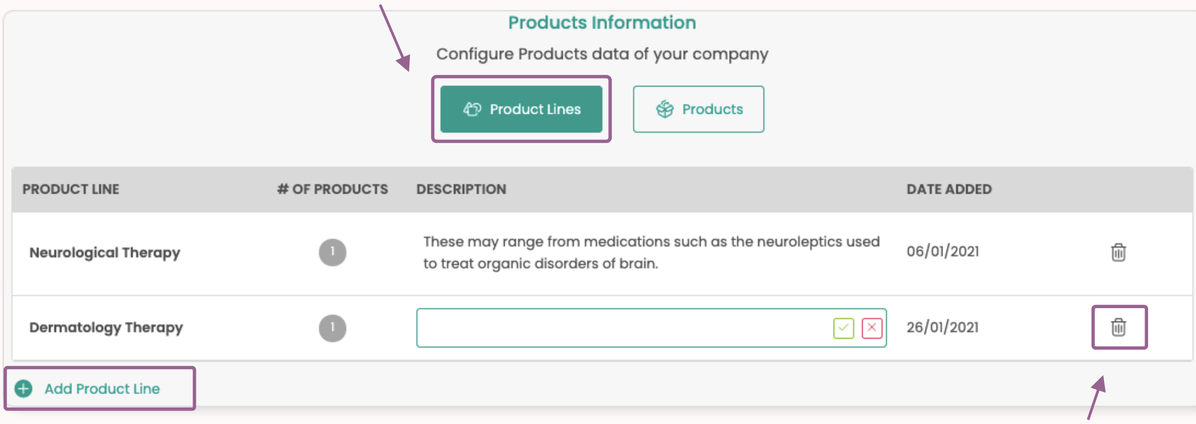
2. Click + Add Disease State. Enter the disease state name. Click the dropdown arrow under Therapeutic Area to select a previously created therapeutic area the disease state relates to.

3. Click the Pencil icon to add further details related to disease state including but not limited to pathophysiology, epidemiology, diagnosis, and disease management.

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.

1. Click the Product Lines button.



2. Click + Add Product Line. Enter the product line name. Add the number of products in the # of Products column. Add a description in the Description column.

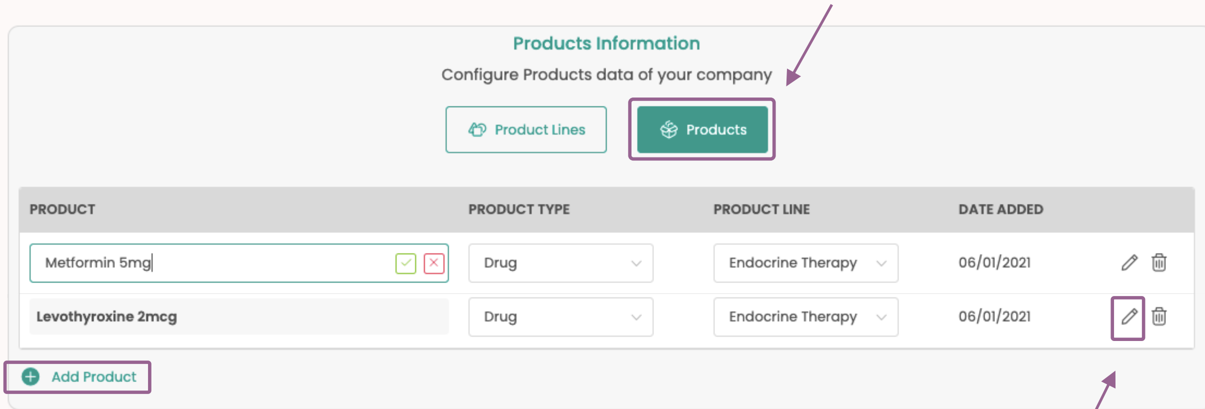
3. Click the Trashcan icon to delete a product line.

PROTIP To learn more about object mapping, and the benefits of adding detailed information into the Clinical and Product categories, please reach out to your ACTO Support team.

Tagging - How to Add Product Tags

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

1. Click the Products button.

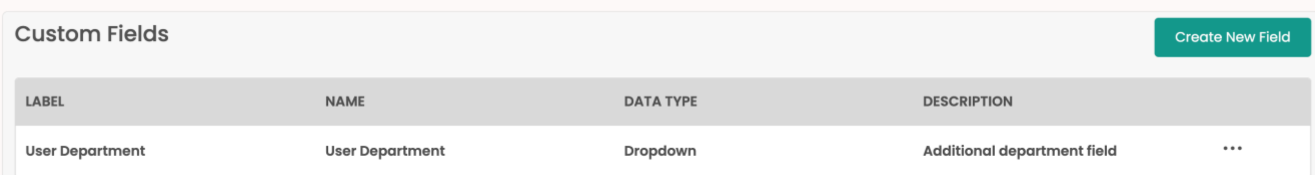


2. Click + Add Product. Enter the product name. Select whether it is a drug or medical device from the Product Type dropdown. Then select what product line it belongs to from the Product Line dropdown.

3. Click the Pencil icon to add further details related to a product including Prescribing Information, clinical research, competition and market state, sales and marketing literature, messaging, and a glossary.

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**.

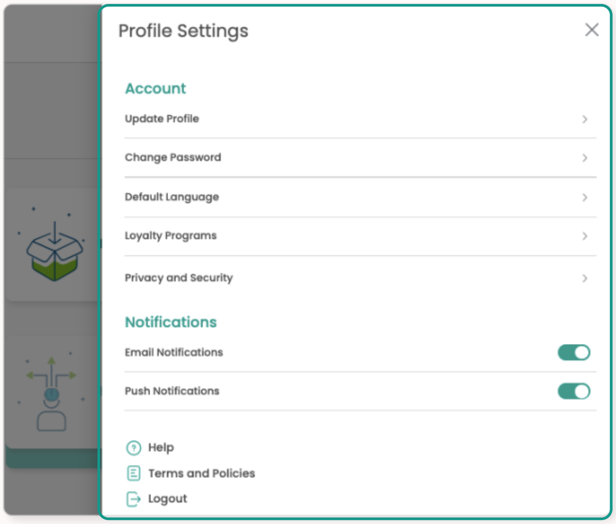


1. Click Setup from the **Navigation menu**. Select Object Management.
2. Click the object you want to configure. Click the Create New Field button. You may also edit the nomenclature in an existing custom field.
3. Proceed through the Object Management wizard. Enter or edit information in the Essentials 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
- Currently reporting is not available for custom fields.

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 name, contact number, and profile picture. Only another administrator can update your email or role.

Click **Change Password** to change your account password. **Not available for users who log in with SSO.**

Click **Default Language** to change the default language for your account.

Toggle to enable **Email and Push Notifications**.

Click **Help** to reach out to ACTO Support.

PROTIP Enabling Email and Push Notifications from the Settings menu helps ensure that you receive email and push notifications when you are assigned or deployed content and resources on the platform.

Click back to Admin Guide to Platform Essentials Table of Contents

Admin Guide to Content Management

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

Click into any of the links below to get started.

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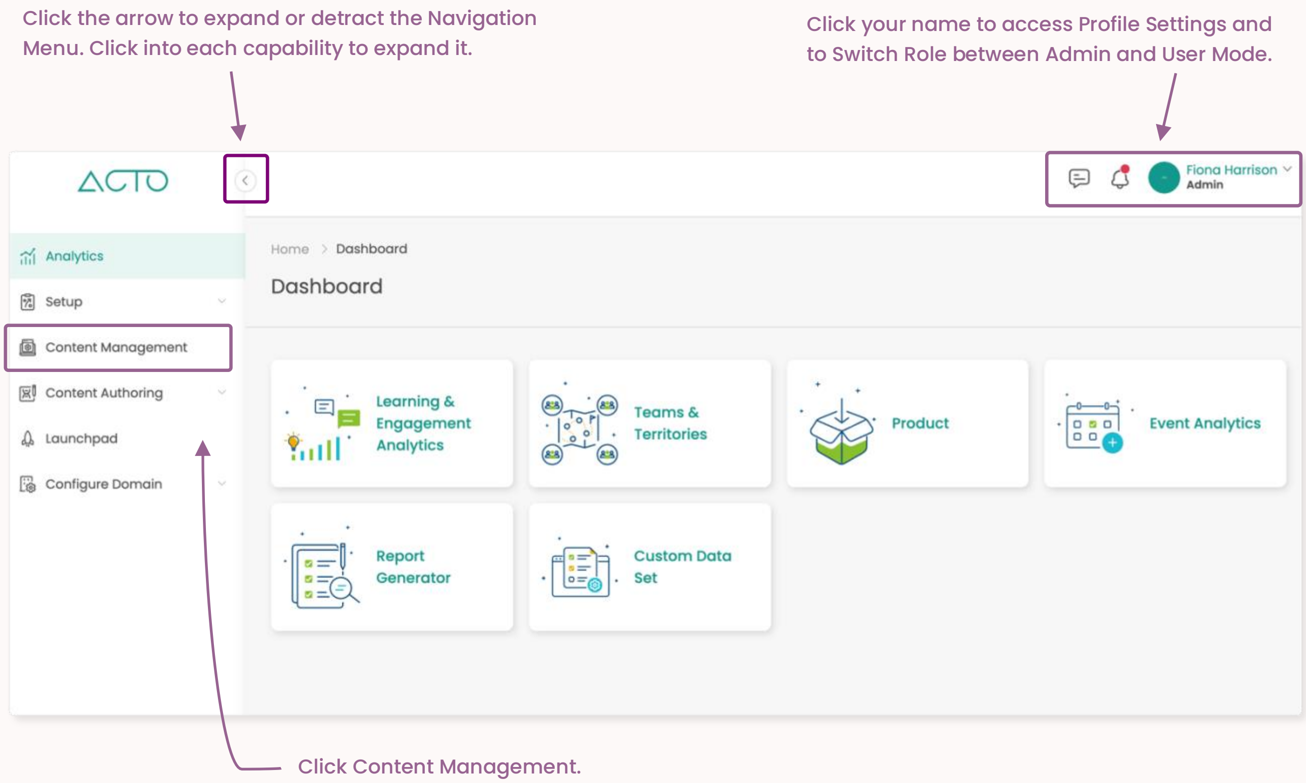
Admin Guide to Content Management

Learning Objectives

- How to organize the Content Management
- How to upload resources into the Content Management
- How to set permission for resources in the 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. <u>**End-users cannot access admin capabilities**</u>
3. Expand the **Navigation menu** on the left of your screen
4. Click into **Content Management**.

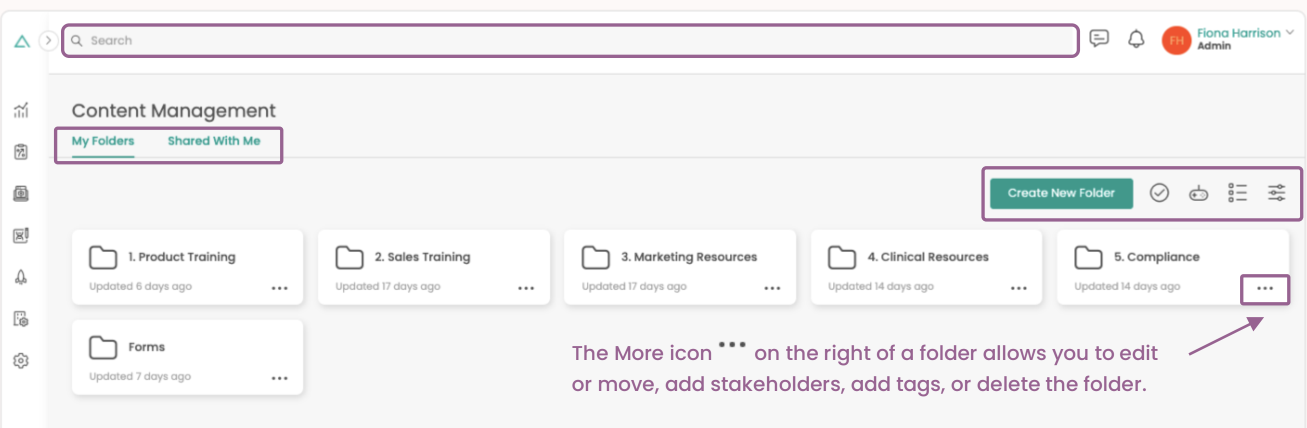
Content Management Quick Overview

- **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/or delete folders in Content Management.
- Each resource 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**.

Create **Folders** in Content Management **to organize content.** → Add/create Resources or Forms. Set resource permissions, tags, and competencies. → Pull resources from Content Management into the platform tools as needed.

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 for resources or folders.

Click **Create New Folder** to create a new folder.

Use the **Checkmark icon** to delete or move folders.

Use **Checklist icon** to switch between list and icon view.

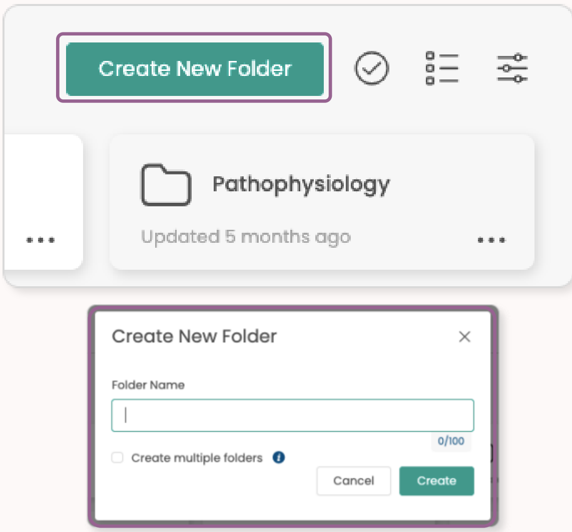
Use the **Filter** to sort through content resources.

Click into **Shared With Me** to access shared folders.

How to Create a New Folder

How to Create a New Folder in Content Management

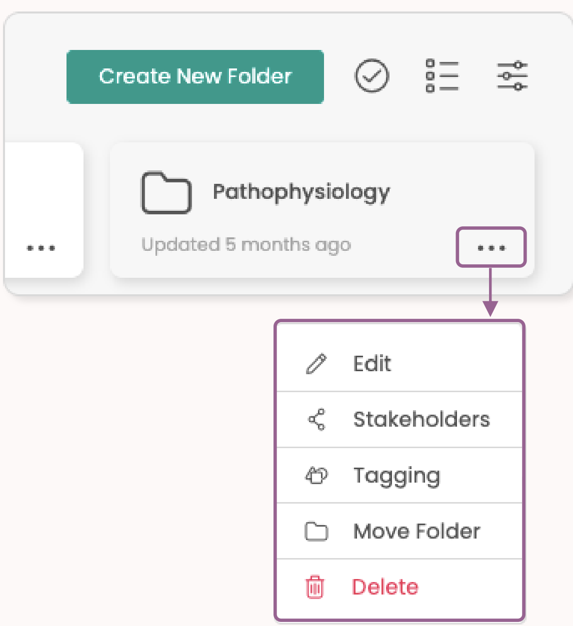
Follow the instructions below to create new a folder and organize your resources in Content Management.



1. Click into Content Management from the Side Navigation menu.
2. Click Create New Folder on the top-right of Content Management. Enter the folder name and click Create.
3. To create multiple folders at one time, 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.
4. 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

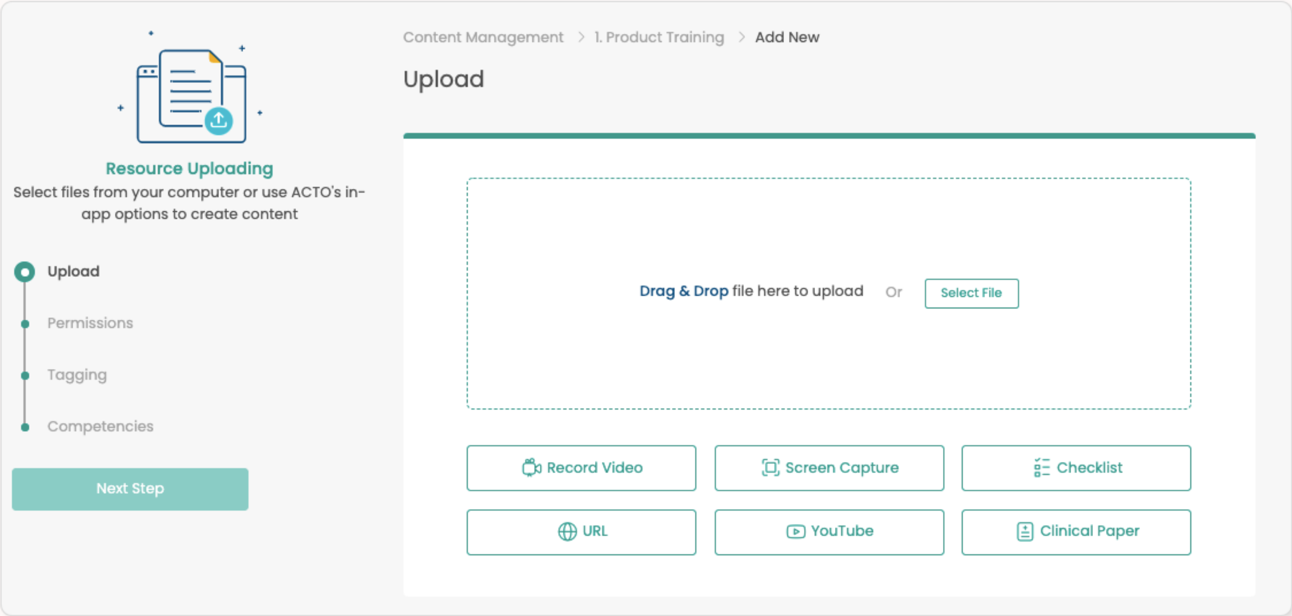
Once a folder is created it may be edited and updated to add stakeholders, tags, or to move it into another folder within Content Management. To add or edit folder details, click the **More icon** ••• on the side of a folder.



- Select Edit to change the folder name and add or update a folder description.
- Select Stakeholders to invite other administrative roles to collaborate on a folder. Click Update or Delete to select their permissions. Click Share to give them access. 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 folder within Content Management.
- Select Delete to delete a folder and its content. To delete or move multiple folders at once, click the checkmark on the top-right of the Content Management page, and select multiple folders.

How to Add Resources into Content Management

Add resources into your Content Management folders by uploading resources from your computer or creating new resources on the platform. **Changes or updates to resources in Content Management will be reflected everywhere else that resource exists on the platform.**



1. Click into Content Management. Then click into the folder you would like to add a resource to.
2. Click the **Add New** button on the top-right of the folder section. Select **Resource**. This will take you to the resource wizard where you can create or upload a new resource. Proceed through the **Upload, Permissions, Tagging, and Competencies** sections.
3. After you upload a resource, the dialogue box will reopen, allowing you to upload multiple resources at one time.

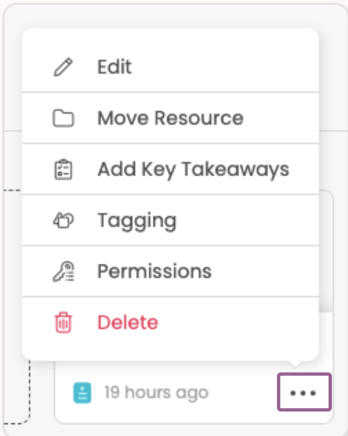
- **Upload** Click Select File to upload a resource from your computer, or select one of the resource options provided. Name the resource and add details like expiry date if applicable.
- **Permissions** Resource permissions are reflected on the end user's side and will determine what actions they may take with the resource.
- **Tagging** Select or add resource tags to better organize the resource.
- **Competencies** Select user-type the resource is targeted to with its associated competencies.

What Resource Types Are There?

- Uploaded Resources – Videos including links to YouTube, image files, audio files, documents, PDFs, PPT, Excel and SCORM files. Please note, Microsoft files must be in DOCX, PPTX, or XLSX format.
- Created Resources – Resources created directly in the platform include self-recorded videos, Screen-capture videos, and Checklists.
- Form Resources – Create forms on the platform and store them in Content Management. Forms include Quizzes, Surveys, Polls, Digital Signatures, Surveys, FCRs, Evaluation, Assessment, and Registration Forms.

How to Edit or Update Resources

When a resource is uploaded into Content Management for the first time, the resource wizard walks you through setting up resource details – including name, associated tags, and permissions. **To edit, update, or upload a new version of the resource at a later point, click the More icon ••• on the bottom right of a resource.**

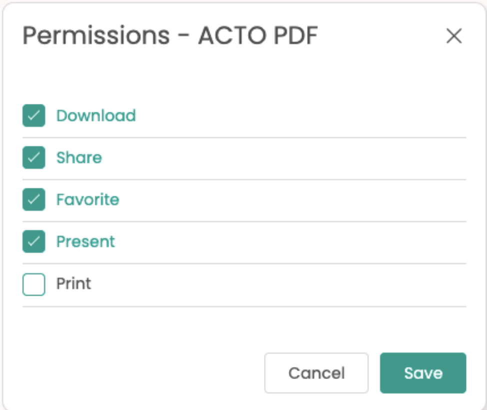


- Click Edit to return to the resource wizard to update resource details or change the resource to an updated version.
- Click Move Resource to move the resource into another folder within Content Management.
- Click Add Key Takeaways to select a secondary resource from Content Management to add as a supplement to the resource.
- Click Tagging to add or update resource tags.
- Click Permissions to add or update resource permissions.
- Click Delete to delete the resource.

PROTIP Tagging enables you to organize and filter information platform wide. It adds intelligence layers to ACTO's AI-enabled LAICA. Tags may be added to training, resources, teams, roles, and more. To add tags to resources, admins will need to have already set up clinical and product data tags on the platform.

What Are Resource Permissions?

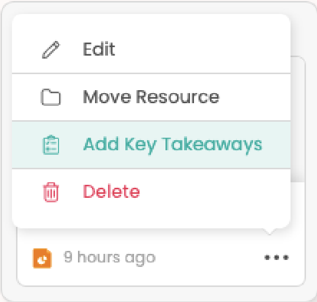
Resources can have custom permissions. This means that end-users can only present, share, favorite, download, or print resources that are pre-approved for these purposes. Please note, by default all permissions for a resource are disabled. Resource permissions are set when a resource is first uploaded. To edit or change resource permissions, click the **More icon** ••• on the bottom-right of a resource and select Permissions.



- Download resources to a user's device.
- Share resources with external stakeholders.
- Favorite and bookmark resources to folders.
- Present resources during meetings.
- Print resources.

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 core resources. **Only videos – including YouTube videos – and checklists can be Key Takeaways. Checklists may not have Key Takeaways added to them**.



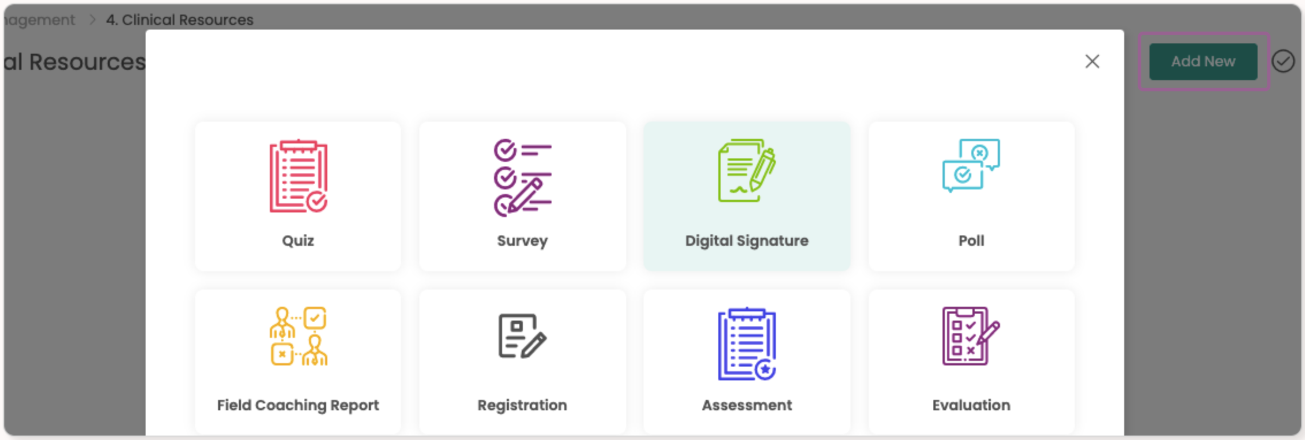
1. Click the **More icon** ••• next to a resource in Content Management. Select Add Key Takeaways

2. Browse through Content Management for your secondary resource. Select the resource and click Add

3. To update or remove Key Takeaways, click the **More icon** 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 different tools. Refer to the upcoming sections to learn more about each specific form type.



1. Click into Content Management. Then click into or create the folder you would like to add a Form into.
2. Click the Add New button on the top-right of the folder. Click Forms. Select the form type you want to create.
3. Enter relevant details into your form type.

How to Organize Forms?

Whether you create folders and sub-Folders just for forms, or incorporate forms into your existing folder structure, we do recommend organizing form by form type so that you can find, leverage, and organize them easily.

What Form Types Are There?

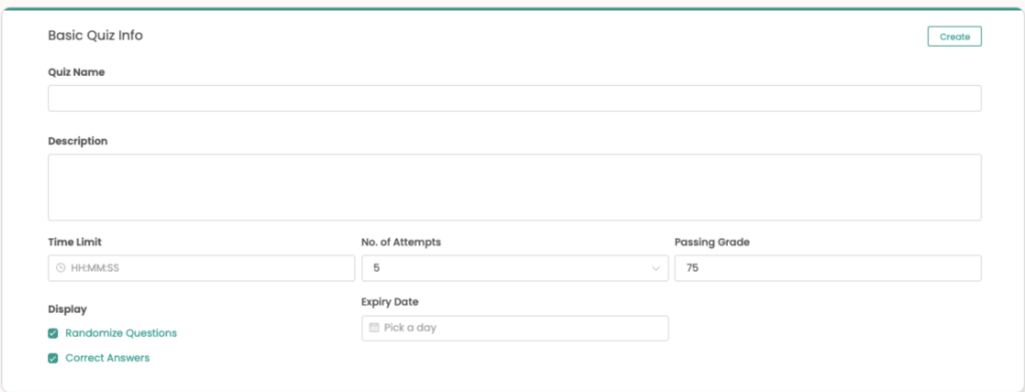
- Quiz – Use regular Knowledge Checks to assess learner understanding and training retention.
- Survey – Use Surveys to request feedback from teams on the effectiveness of training and resources.
- Digital Signature – Use Digital Signatures to acquire e-signatures and signoffs from team members.
- Poll – Use Polls to quickly poll and gather information from team members.
- Field Coaching Report – Use FCRs as a guideline to evaluate learner performance in the field.
- Assessment – Use Assessment Forms as a guideline 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

Adding Quizzes into your training allows you to assess learner understanding and training retention. Please follow the instructions below to learn how to create a quiz form.

The Quiz Name and Passing Grade are mandatory fields.

Customize quizzes by selecting a Time Limit, Attempt Limit, and Expiry date.



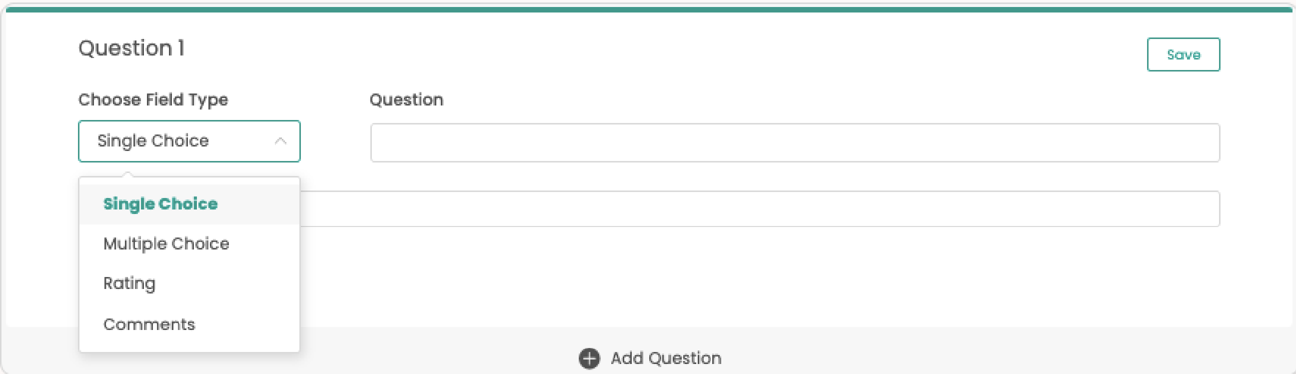
Click Randomize Questions to display quiz questions in a random order. Click Correct Answers to display the correct answer to users once they have completed the quiz.

1. Click Content Management. Click into the Folder you want to add a form into. Click Add New. Select Form and choose Quiz.
2. Enter basic quiz details like the name, description, and passing grade. Click Create.
3. Select a quiz question type from the dropdown menu. Enter the quiz question and answer options. Click Add New Field to enter additional answer options. Make sure to click Save.
4. Click Add New Field to enter the next question. Click Preview to view the quiz the way end users would.

- Single Choice – Asks respondents to select the correct choice from provided options.
- Multiple Choice – Asks respondents to select multiple correct choices from the provided options.
- Matching – Asks respondents to match correct options. Matching questions can be in the following formats: Text to Text, Text to Image, Image to Text, and Image to Image.
- True or False – Asks respondents to select whether a statement is True or False.

Forms - How to Create a Survey

Adding **Surveys** into training modules allows you to request insight and feedback from end-users.



1. Click Content Management. Click into the Folder you want to add a form into. Click Add New. Select Form and choose Survey.
2. Enter basic details like the survey name and description. The Expiry Date field is optional. Click Create.
3. Select a survey question type from the dropdown menu. Enter the question-and-answer options. Click Add Option to enter additional answer options. Make sure to click Save.
4. 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.

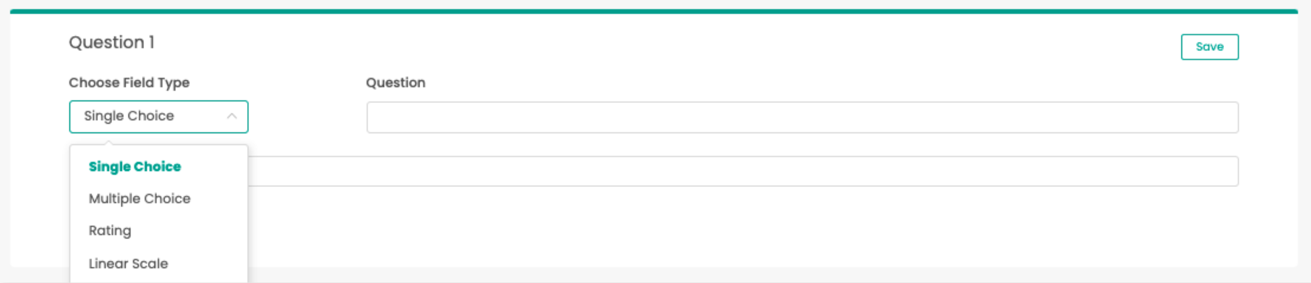
Forms - How to Create a Digital Signature

A **Digital Signature** allows you to enter custom text that end-users are required to sign off on. *Example - I acknowledge that I have completed all the required training in this module.* 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 Content Management from the Side Navigation menu. Click into the Folder you want to add a form into. Click Add New. Select Form and choose Digital Signature.
2. Enter the Digital Signature name and the text users will be required to acknowledge or sign off. The expiry date field is optional. Click **Create**. Click **Preview** to view the Digital Signature the way an end-user would.

Forms - How to Create a Poll

Polls allows you to quickly gather valuable insight from learners by asking them to respond to poll questions.

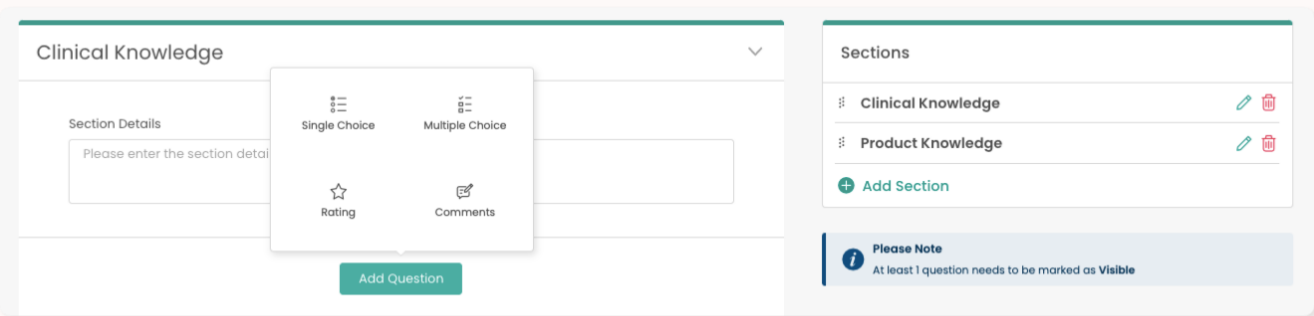


1. Click into Content Management. Click into the Folder you want to add a form into. Click Add New. Select Form and choose Poll.
2. Enter basic details like the poll name and description. The Expiry Date field is optional. Click the Poll results at the end checkbox to enable all users to view the results once they submit a poll. Click Create.
3. Select a poll question type from the dropdown menu. Enter the question, and answer options. Click Add Option to enter additional answer options. Make sure to click Save.
4. Click Add New Question to enter the next question. Click Preview 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.



Evaluation Criteria

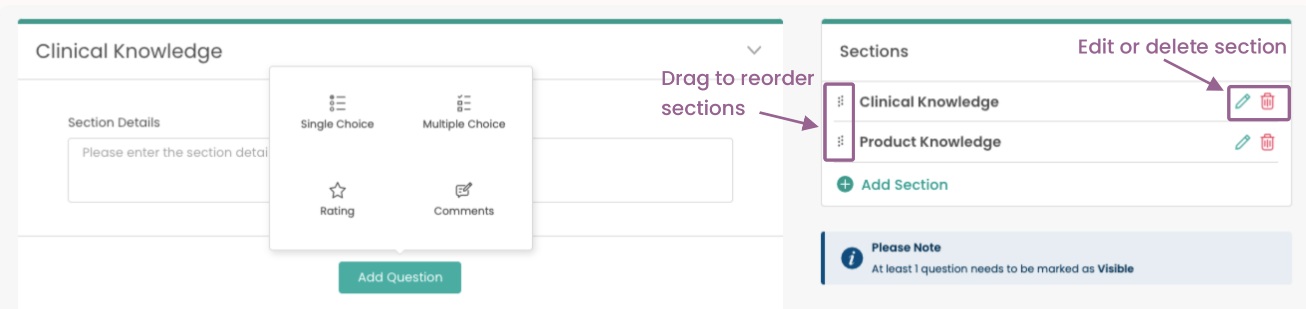
When you create an FCR, Evaluation, or Assessment, note the Evaluation Description under each question. This allows you to create a rubric defining each answer and provide detailed evaluation criteria to Managers.

1. Click into Content Management. Click into the Folder you want to add a form into. Click Add New. Select Form choose Field Coaching Report.
2. Enter the FCR's basic details. Select display preferences: **All-in-One View** or **Section View**.
3. Add, name, reorder, or delete sections on the right of your screen under **Sections**.
4. Add questions into the FCR on the left by clicking Add Question and selecting a question type. **Reference question types on the right.**
5. 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 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** to each of 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.

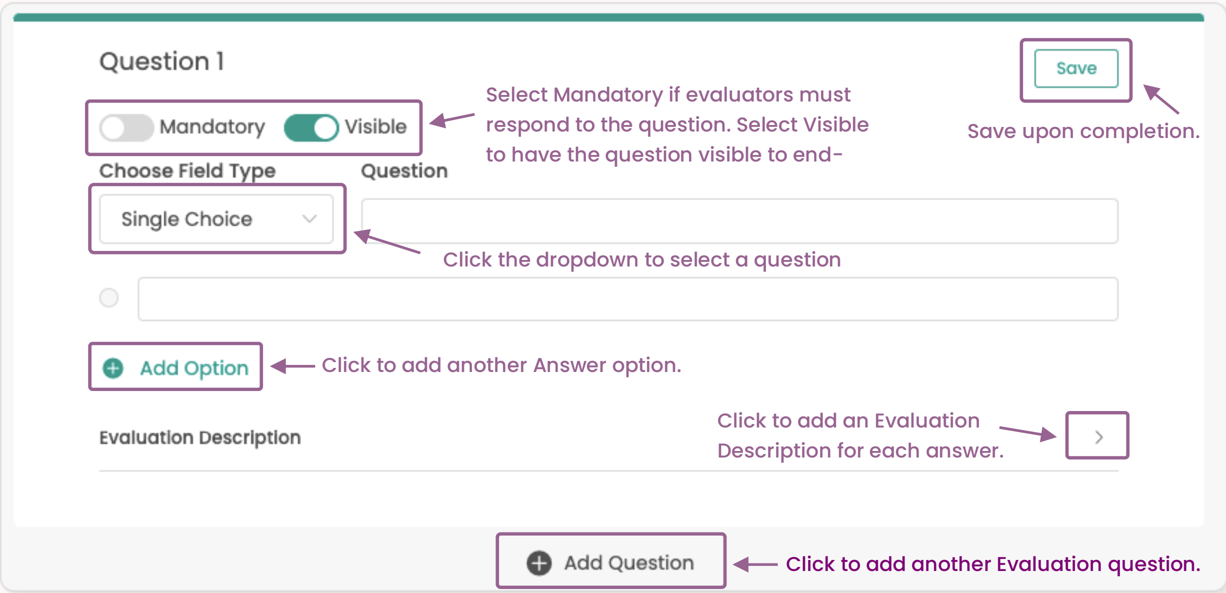


1. Enter the Assessment's basic details. Enter instructions to the certifier and set a Passing Threshold. Select your display preferences by choosing **All-in-One-View** or **Section View**.
2. Add, name, reorder, or delete Assessment sections on the screen's right under **Sections**.
3. Add Assessment questions on the left by clicking Add Question and selecting a question type. **Reference question types on the right.**
4. 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 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** to each of the other question types to add a text field to that specific question.

Forms - How to Create an Evaluation

Each Coaching Scenario has an Evaluation Form in it. When a Manager is assigned a Scenario, they will use the Evaluation Form to assess the end-user's response.



1. Click into Content Management. 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. Select a question type. **Please reference 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.

Click back to Admin Guide to Content Management Table of Contents

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

Admin Guide to Learn

Learning Objectives

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

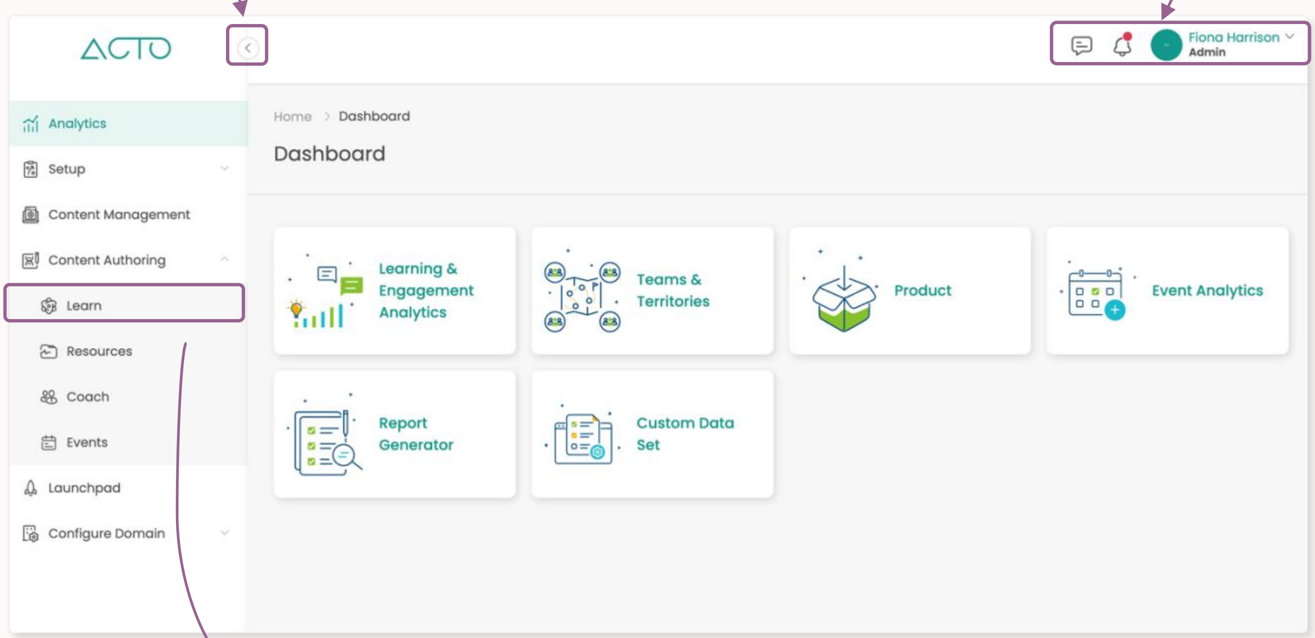
How to Access Learn

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 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 Learn.

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 **Learn**.

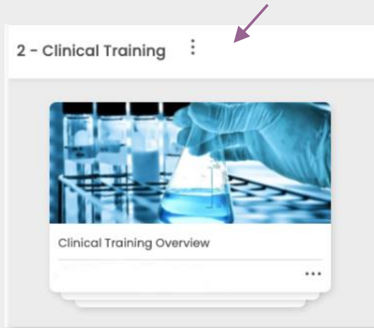
Learn Quick Overview

- 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 Sets** 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.

Create one or more Categories. → Add one or more Learning Sets to each Category. → Add one or more ActionPacks to each Learning Set. → Populate each ActionPack with content and resources.

How to Create a Category

The More Options icon looks like three dots, and provides further options.



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 the **More Options icon** on the top right of the Category.

How to Create a Learning Set

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

Learning Set name

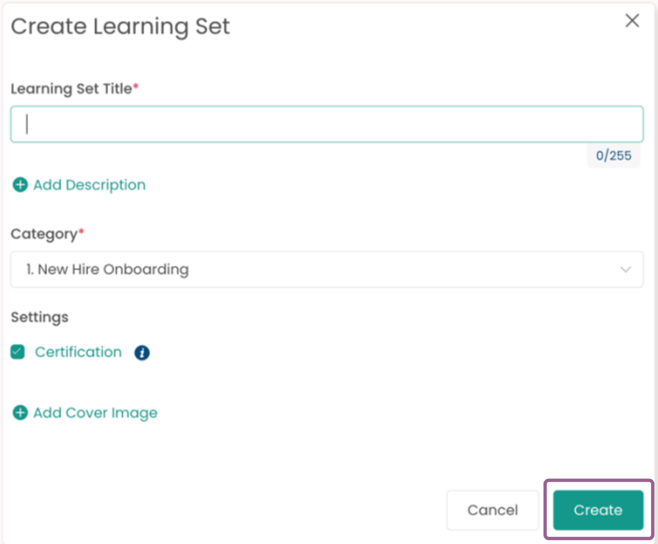
Date the Learning Set was last updated

Click into the Learning Set to view the ActionPacks it contains

Click the More icon to Edit or Delete the Learning Set

ACTO

To create a new Learning Set, click **Add New Learning Set** in the Category you want to add it to. You may 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.

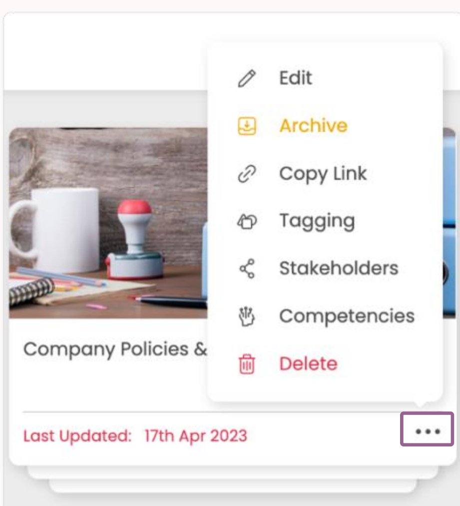


1. **Learning Set Title** - Enter a name for the Learning Set that clearly references its content.
2. **Add Description** – Add an optional description. Only administrative roles can view this.
3. **Category** – Select the Learning Set's Category.
4. **Settings** – Click Certification if you want end-users to receive a certificate upon completion.
5. **Settings** - Expand Add Cover Image to upload a cover image for the Learning Set.
6. Click **Create** to complete.

PROTIP When creating a new Learning Set, please make sure to first create the Category that it will live in.

How to Edit or Update a Learning Set

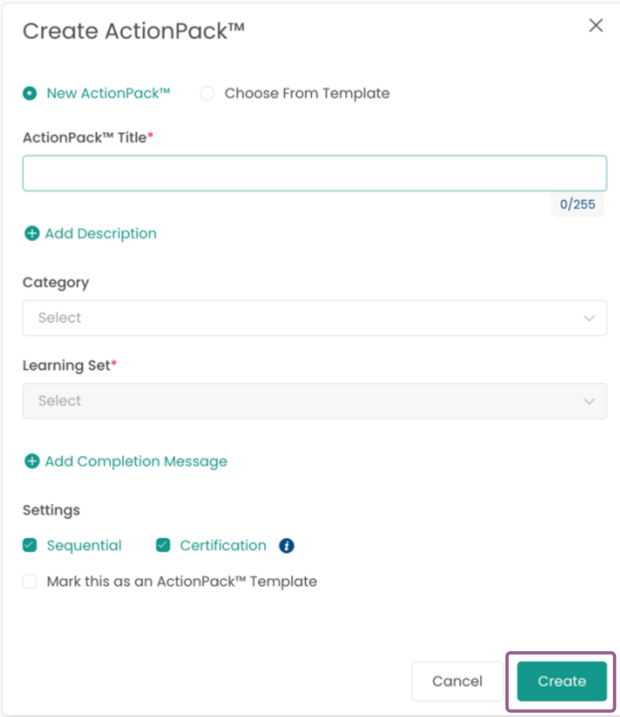
To make changes to a Learning Set click the **More icon** ••• on the bottom right and select from the options menu. This allows you to edit, archive, tag, and delete the Learning Set, and take other actions as shared below.



- **Edit** – Click to change the Learning Set title, description, category, or cover image.
- **Archive** – Click to archive the Learning Set. It will still remain on your 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 to them.
- **Competencies** – Select the user role(s) this Learning Set is aimed at, and select the relevant competencies.
- **Delete** – Click to delete the Learning Set.

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.

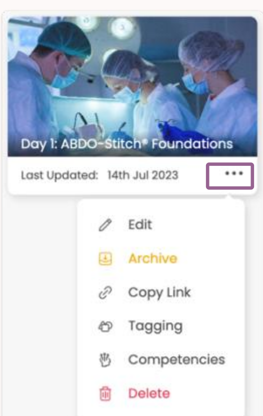


1. ActionPack Title - Enter a name for the ActionPack that clearly references its content.
2. Add Description – Add an optional description. Only administrative roles can view this.
3. Category – Select the ActionPack's Category.
4. Learning Set – Selection the Learning Set the ActionPack lives in.
5. Completion Message – Add an optional completion message end-users would receive upon completing the module.
6. Settings – Click Sequential if you would like end-users to access each Lesson in order. Click Certification 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 Once you have gone through the ActionPack wizard, click into the new ActionPack to add content.

How to Edit or Update an ActionPack

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



- Edit – Click to change the Learning Set title, description, category, or cover image.
- Archive – Click to archive the ActionPack. It will still remain on your Learn homepage, but will be faded. You may unarchive a Learning Set using this same menu.
- Copy Link – Click to generate a shareable link to share with users already deployed the content.
- Tagging – Click to add existing tags to this content.
- Competencies – Select the user role(s) this Learning Set is aimed at, and select the relevant competencies.
- Delete – Click to delete the Learning Set.

Key Structural Elements in an ActionPack

- **Topic.** An ActionPack is broken down into two sections: **Topics and Lessons**. A **Topic** is main training 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

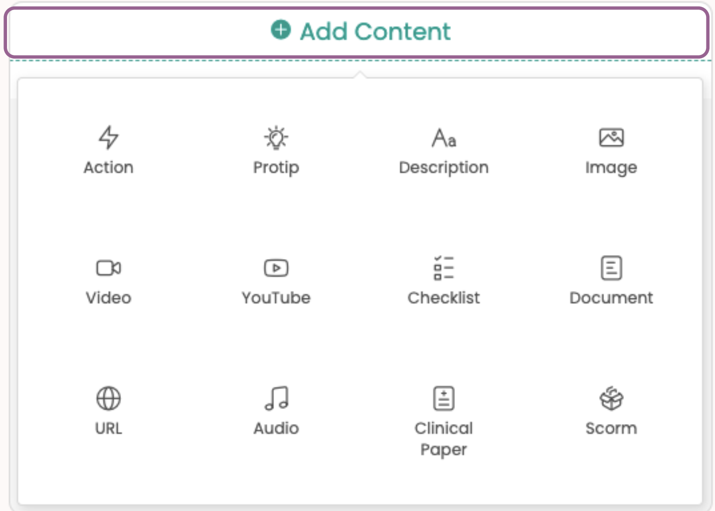
An ActionPack **Table of Contents** displays the Topics and Lessons in that ActionPack. Once the module's structure is created, content and resources can be easily plugged in to each Lesson.

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 your Enter key.
3. To add content into a specific Lesson, click into the Lesson.
4. To reorder Topics or Lessons, hover and **three vertical dots** will show up. Use them to drag and drop the Topic or Lesson to the desired location within the Table of Contents.
5. To edit the name of a Topic or Lesson click the **Pencil icon**.
6. To delete a Topic or a Lesson click the **Trashcan icon**.
7. To add a Form into an ActionPack click Add and select the type of 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's side, the ActionPack's Table of Contents guides each learner through the module and provides them with a bird's eye view of what to expect as their training 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 users with learning objectives and other engaging resources aimed at enhancing the user's learning experience.



1. Click into the Lesson you would like to add content into. Click Add Content and select the resource you would like to add. Please note, with a few exceptions, resources you add into a Lesson must already be in the **Content Management** system and accessible to you.

2. Hover over a section within a Lesson and drag and drop the three vertical dots to reorder it. You may move whole sections around, but not reorder a content type within its own section.

3. Once you have entered all the content in a Lesson please click Save and 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 the Content Management tool and then pulled into the ActionPack.

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

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, and other educational images.

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.

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 mouse cursor. This provides a record that may be used to attain user acknowledgement, or to sign off on training completion.

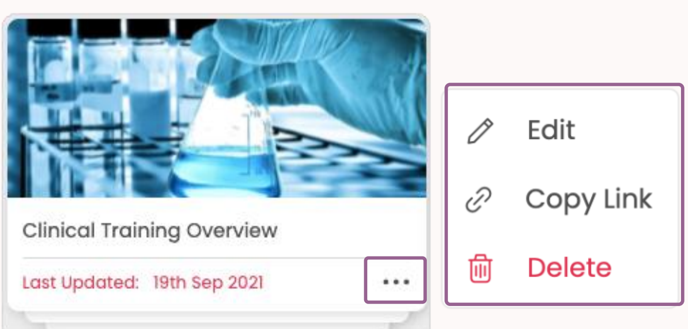
How to Make an ActionPack a Template

Templatizing an ActionPack allows you to reuse and customize the structure, content, tagging, and competencies within an already existing ActionPack without needing to recreate it from scratch.

- To make a new ActionPack into a template, click the Mark this as an ActionPack Template checkbox 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 clicking **Edit** on the side menu of the ActionPack) and select Mark this as an ActionPack Template in the wizard.

How to Generate Shareable Links in Learn

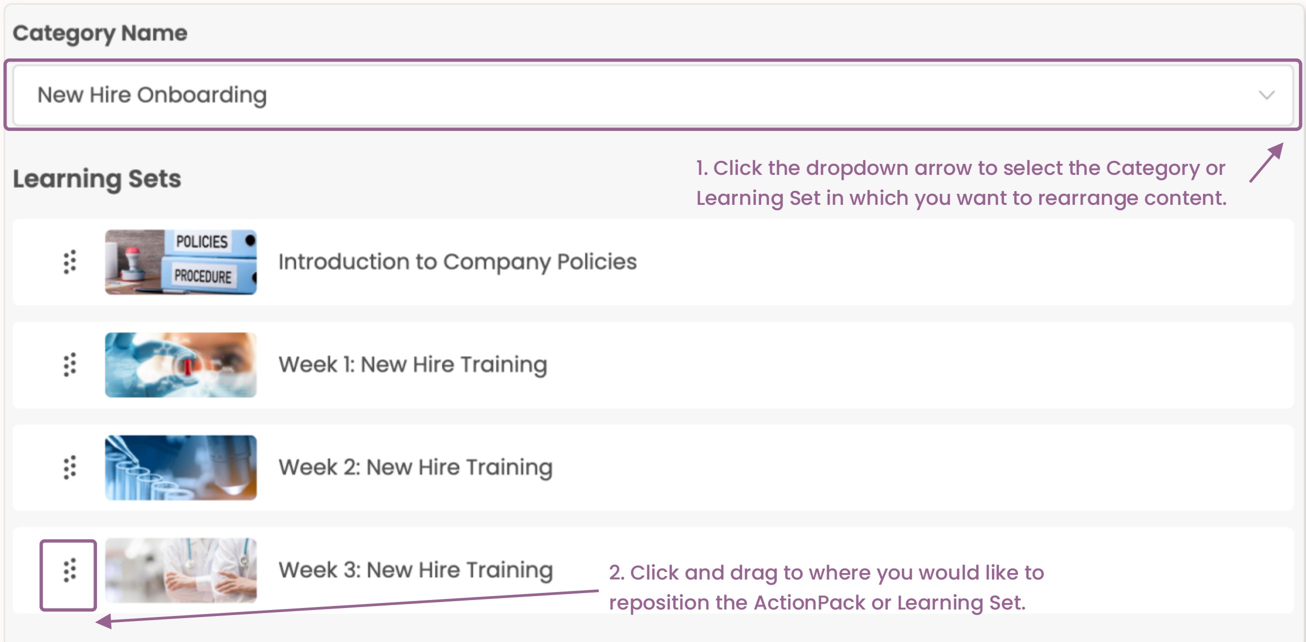
Shareable links are direct links to content that has already been deployed to end-users. Sharing a link to a specific Learning Set or ActionPack allows recipients to directly access the shared content. In the Learn tool, shareable links (if this feature is enabled for you) may be generated for **Learning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



1. Click Content Authoring from the Navigation menu. Select Learn.
2. Navigate to the Learning Set or ActionPack 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.

How to Rearrange Content in Learn

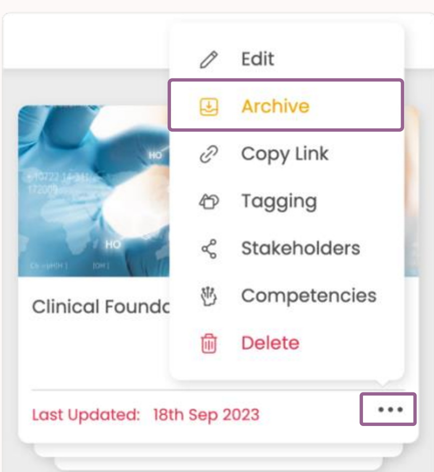
You may reorder Learning Sets on the Learn homepage, as well as ActionPacks within Learning Sets. Click the Rearrange button on the top-right of Learn and select Learning Set or ActionPack.



PROTIP 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.

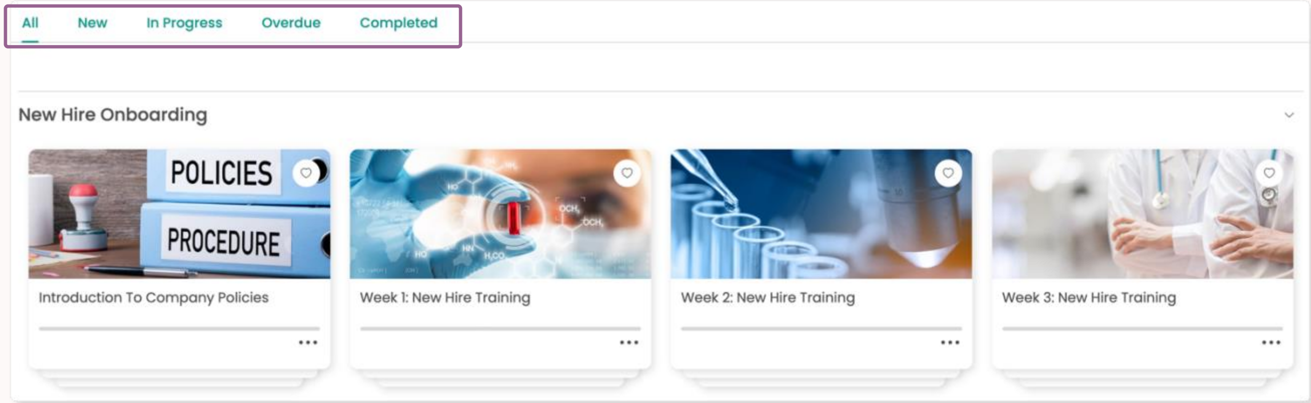


2. Click Archive.

1. Click the More icon (three dots) on the bottom right of a Learning Set or ActionPack to view the options menu.

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]

Admin Guide to Resources

The **Resources** tool 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

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.

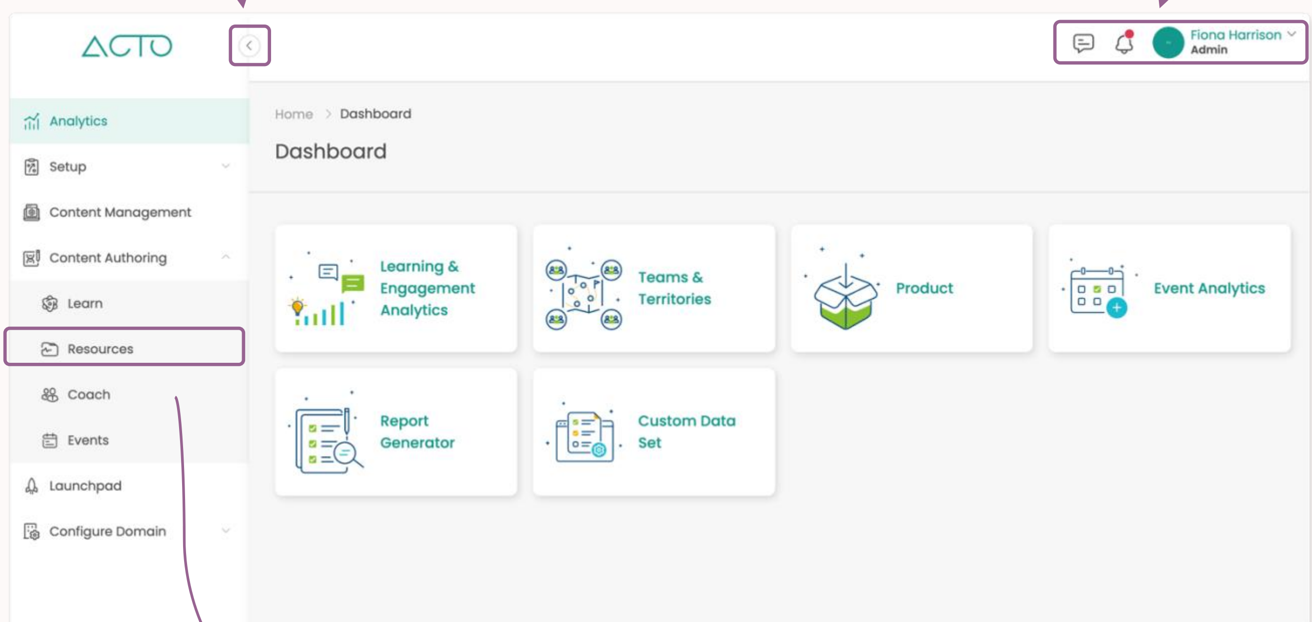
How to Access Resources

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 functions.
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 the Launchpad tool.

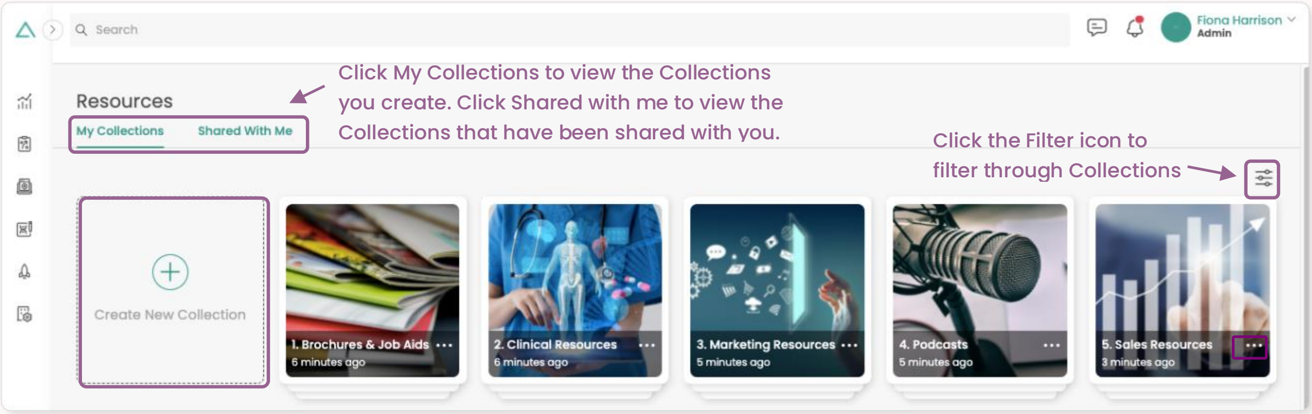
Resources Workflow

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

Create **a Collection in the Resources tool.** → Add Resources into a Collection. → Deploy Collection to end-users using the Launchpad tool.

How to Create a Collection - Quick Guide

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

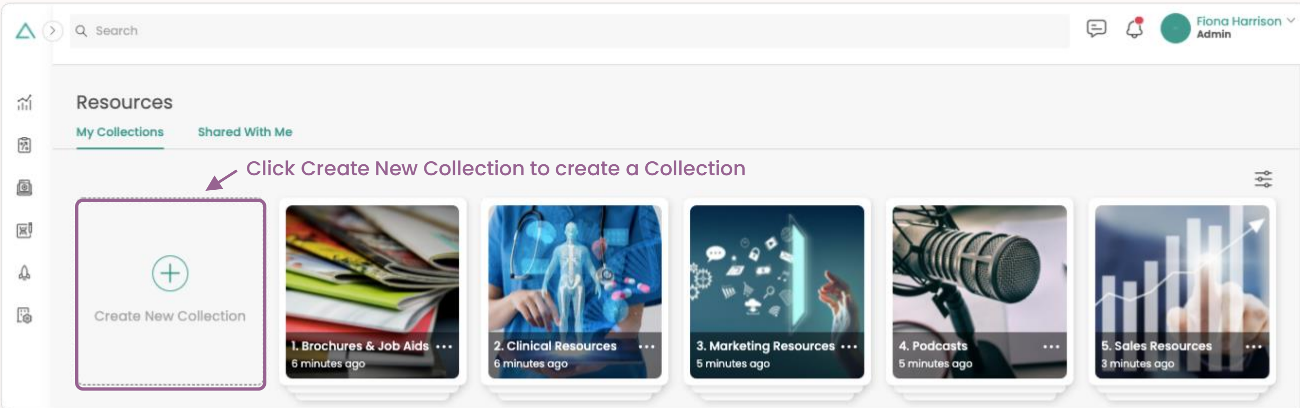


Click Create New Collection to create a Collection

Click the More icon to edit or delete a Collection.

How to Create a Collection - Details

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



1. Click Content Authoring from the Side Navigation menu. Select Resources.
2. On the Resources page click Create a New Collection to create a new Collection. Then enter details into the Collection wizard.
3. To edit or delete an existing Collection, please click the **More icon** ••• on the side of the Collection.

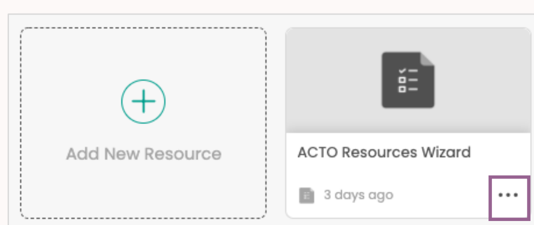
NOTE As you proceed through the wizard please click **Save** after each section and **Next Step** to move forward.

- **Essentials** – Enter the name and a short description. Upload a cover image and select brand colors.
- **Tagging** – Select or add relevant tags.
- **Competencies** – Select which user type the Collection will be deployed to, and what competencies they will be measured on.
- Stakeholders – Add administrative collaborators who will be able to edit, update, or delete the Collection.

How to Add Resources to a Collection

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

1. To get started, click Content Authoring from the Navigation menu. Select Resources.
2. Click into a Collection and select Add New Resource. Select the resource from Content Management and click Add.
3. Add a sub-Collection to a Collection by clicking Add New Collection inside an existing Collection.

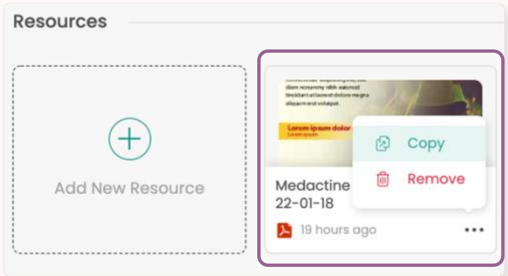


PROTIP To delete a resource click the **More icon** next to it. Select **Delete**.

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.

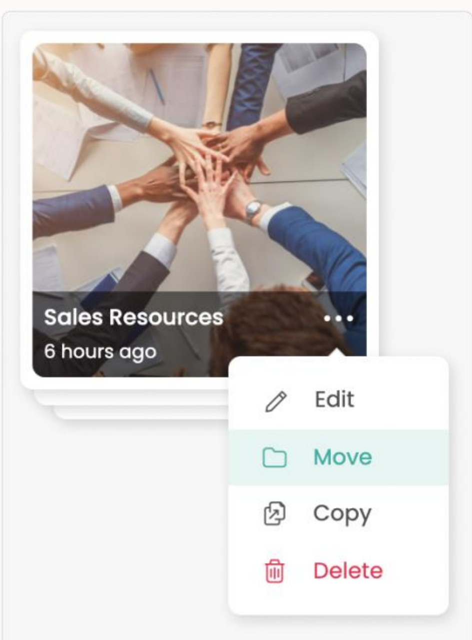
1. Click into Resources. Click into a Collection and find the resource you would like to copy.
2. Click the **More icon** ••• on the bottom right of the resource tile and select Copy.
3. Select the Collections you would like to add the resource into. Click Copy Here. Please note, if you delete the resource from one Collection, it will not be deleted from the other Collections it is in

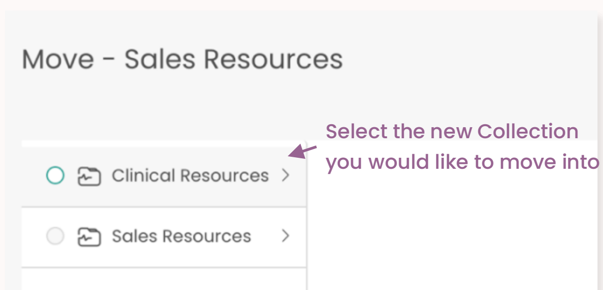


PROTIP Resources are not the only thing you can copy. You can also click the **More icon** on a Collection itself, and duplicate the whole folder into one or more Collections.

How to Move Collections

You may move and reorder Collections within the Resources tool, 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.

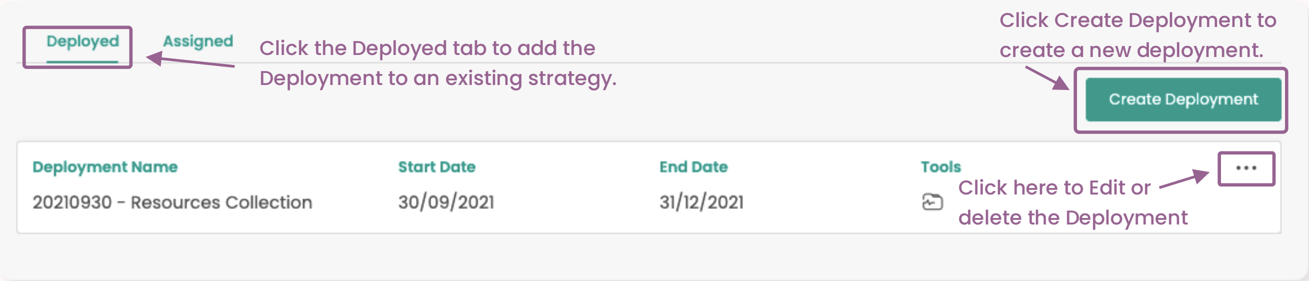




1. Click into Resources. Find the Collection that you would like to move.
2. Click the **More icon** ••• on the bottom right of the Collection tile and select Move.
3. Select the Collection or sub-Collection you would like to move your Collection into. Click Move Here.

How to Deploy Collections

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

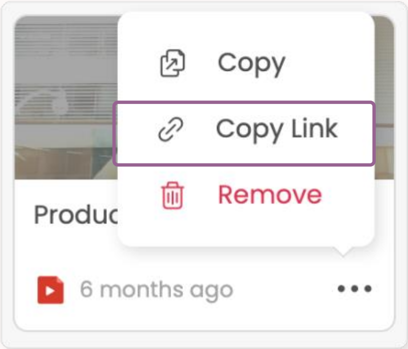


1. Click **Launchpad** from the Side Navigation menu.
2. Create a new strategy by clicking the **Launch New Strategy** button or click into an existing strategy and deploy the Collection from there.
3. On the Strategy page click **Deploy**. Select **Resources**.
4. Enter details into the Resources wizard.

1. **Essentials** – Enter the Collection name and a start and end date for the deployment.
2. **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.
3. **Audience** – Select Teams or individual users to deploy the Collection to.

How to Generate Shareable Links for Resources

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.

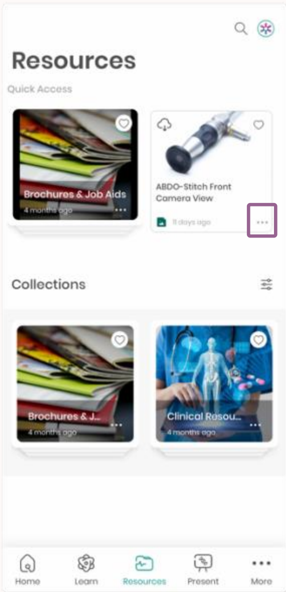


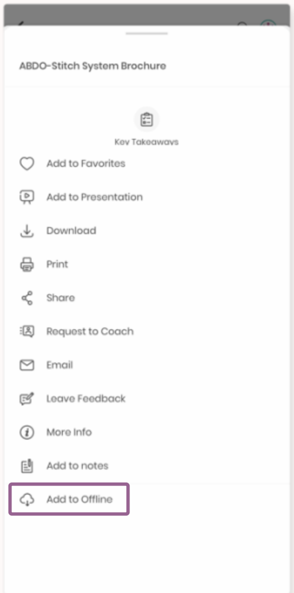
1. Click **Content Authoring** from the Navigation menu. Select **Resources**.
2. Navigate to the Collection or Resource you would like to copy. Click the More icon and select **Copy Link**. Then click Copy. You may then share this URL link. Please note, the link recipient(s) must already be deployed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

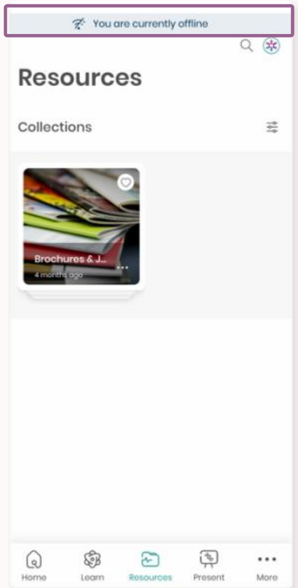
What is Offline Mode for Resources?

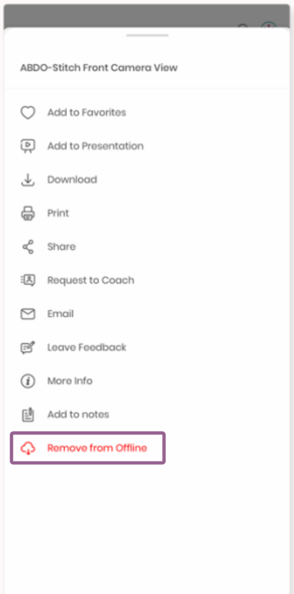
Offline mode enables end-users to save Collections and individual resources to their device for offline access. If this feature is enabled on your platform, users will be able to access all their resources and Collections offline.

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

The **Coach** tool on ACTO Omnichannel 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

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.

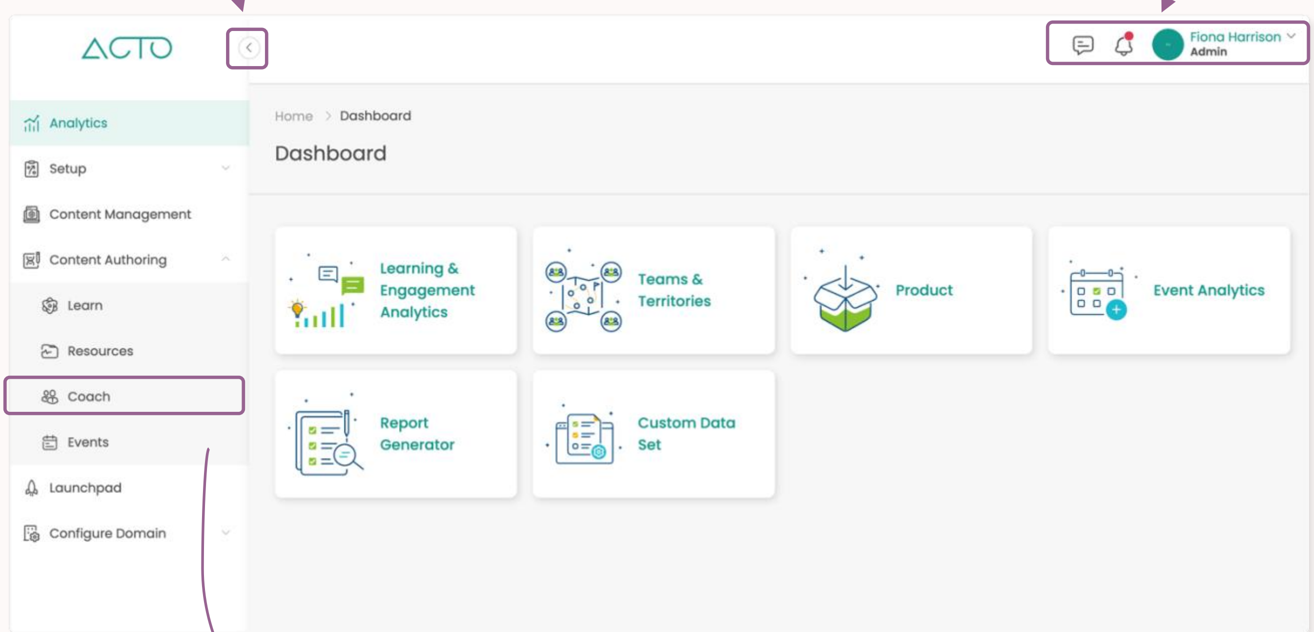
How to Access Coach

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.

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 Coach

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 **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.

1 - Admin >> Create an **Evaluation Form**. The same Evaluation Form may be used in multiple Scenarios.

2 - Admin >> Create Scenario in Coach Tool.

3 - Admin >> Assign Scenario to Admin, Manager, or Draft Manager roles using the **Launchpad**.

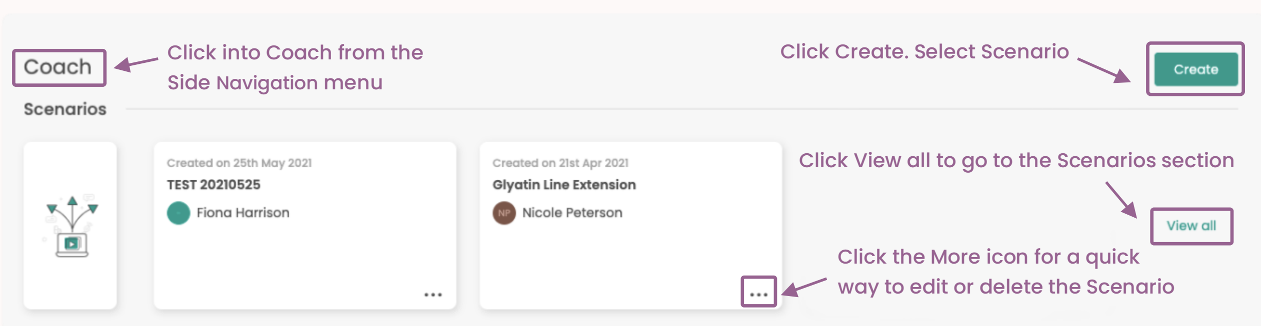
4 - Admin, Manager, Draft Manager >> Deploy assigned Scenario to end-users.

5 - Users >> End-users receive the Scenario, respond to it via video, and submit it back to their Managers.

6 - Admin, Manager, Draft Manager >> Use Evaluation Form to evaluate user response. Provide feedback.

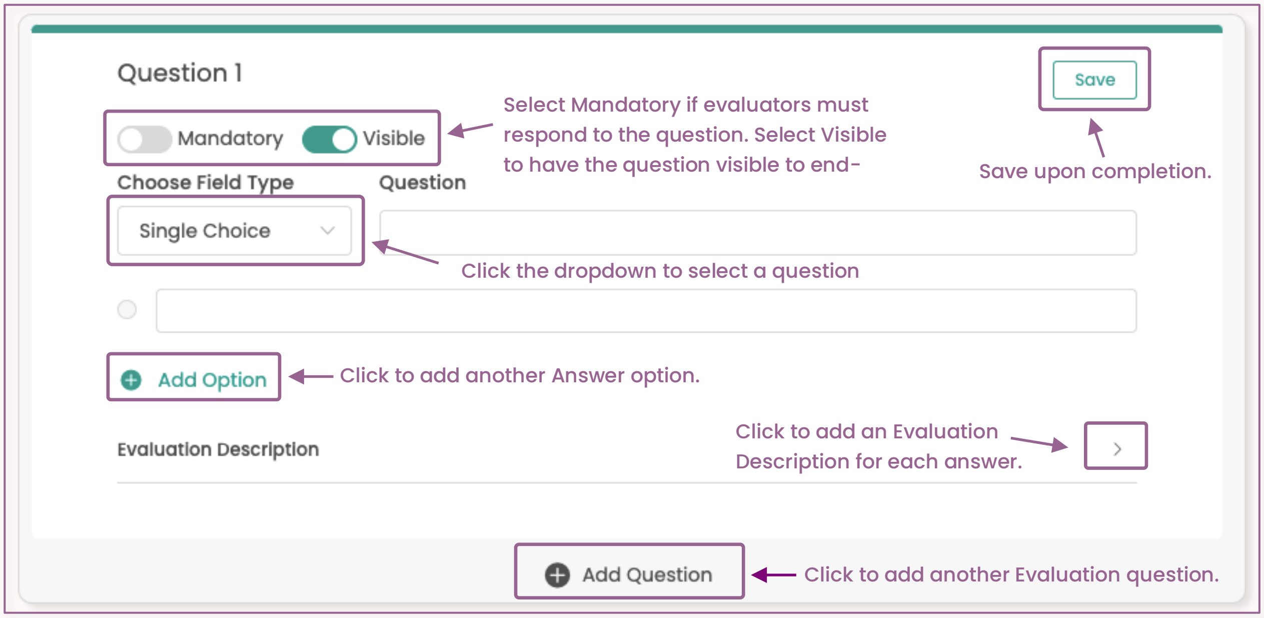
How to Create a Scenario Quick Guide

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

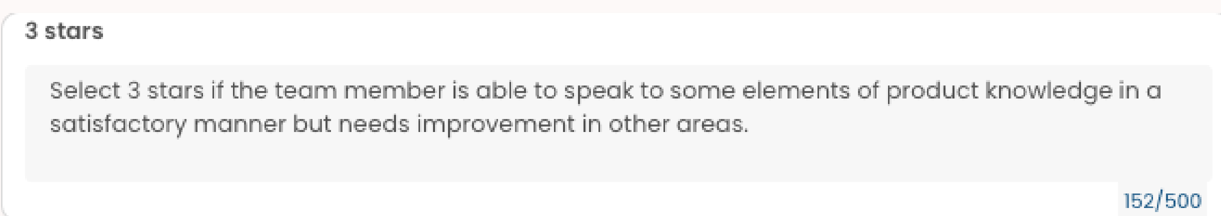
Each Coaching Scenario has an Evaluation Form in it. This Form is created by the Admin role. When other administrators are assigned a Scenario, they will use the Evaluation Form to assess the end-user's response.



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.

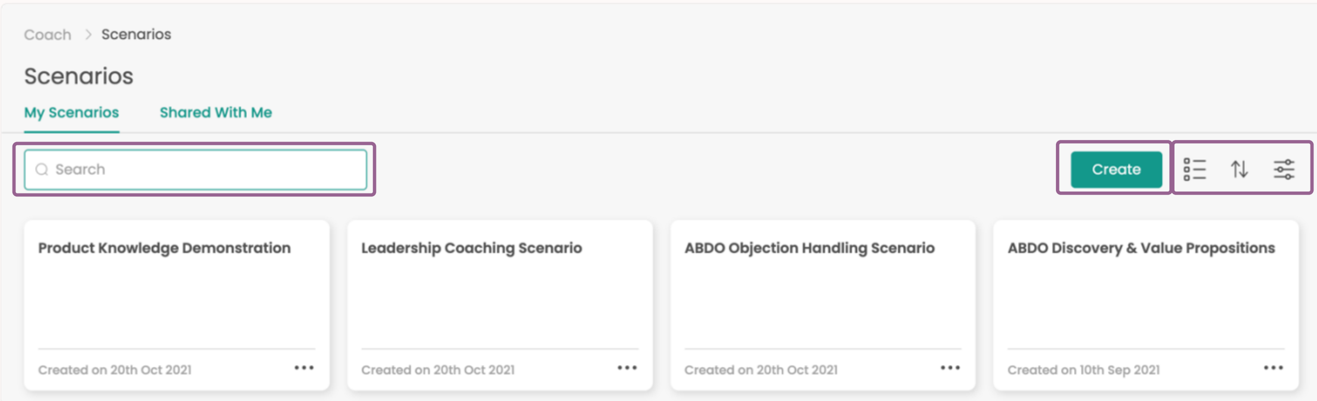
- **Single Choice** – The evaluator selects the most appropriate response from provided options.
- **Multiple Choice** – The evaluator selects all appropriate responses from provided options.
- **Rating** – The evaluator rates the user's response from one to five stars. Add a description of each star 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.



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 **Content Authoring** from the Side Navigation menu. Select **Coach** and then **View All** to get to the Scenario section. Click **Create** on the top-right of the Scenario page.
2. Proceed through the Scenario wizard to enter details and customize the Scenario. Click **Save** and **Next Step** after each section. **Review the section on the right for details on the wizard.**
3. Review all the information you have entered and click **Complete** to save and create.

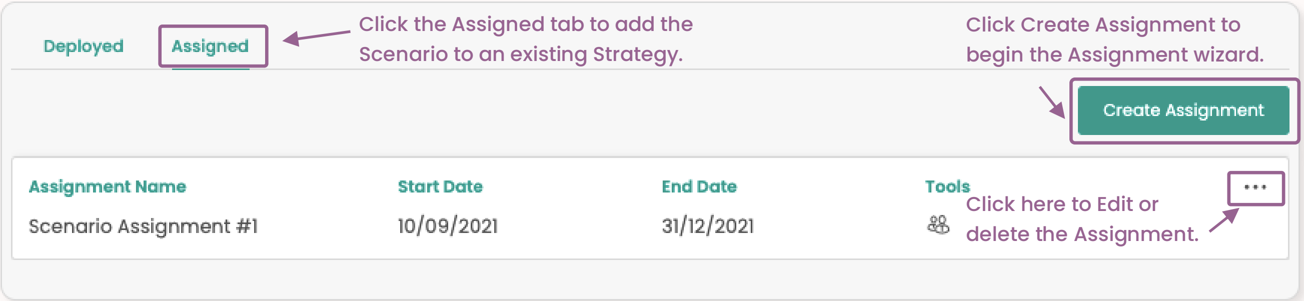
PROTIP In the Scenario section, you may use the Search bar or filter to find the Scenario you need. You can also view Scenarios in a list view, or sort by name, date, or most recently created.

- **Essentials** – Enter the Scenario name and description. You may add a video providing end-users with instructions or an example.
- **Evaluation Form** – Select a pre-created Form. You may also add a new Evaluation Form here.
- **Resources** – Add supplemental support material like Learning Sets or Collections
- **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** – Collaborators are 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.
- **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.

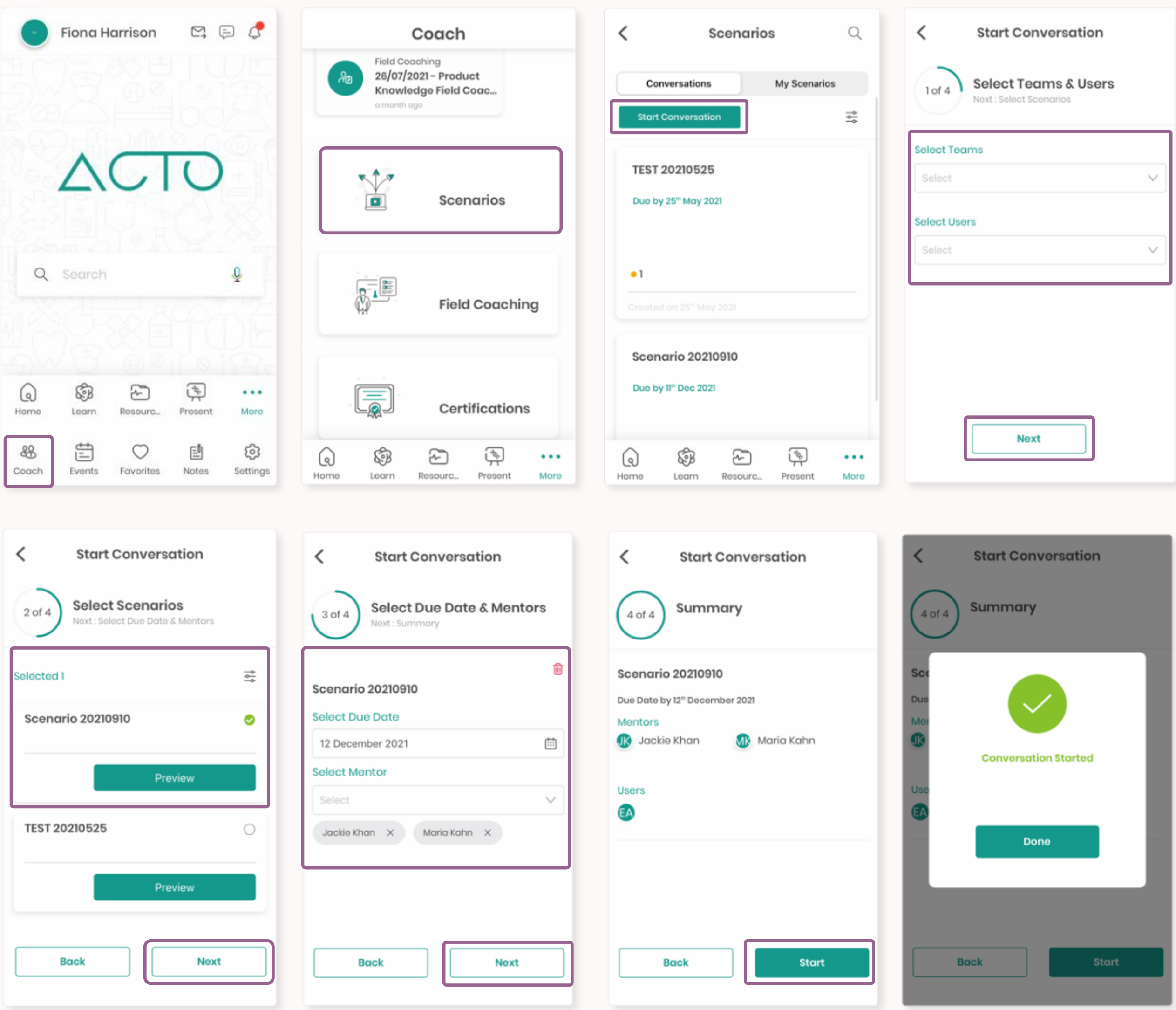
Click back to Admin Guide to Coaching Scenarios Table of Contents

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 <u>must</u> 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.



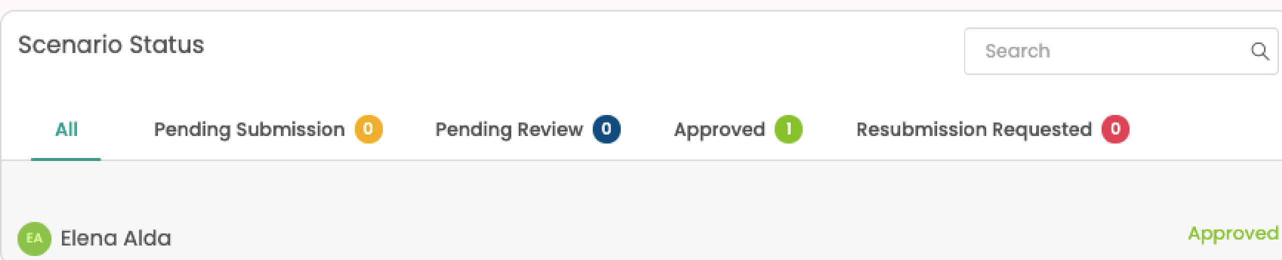
How to Deploy a Scenario – Text Instructions

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, 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/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 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

Certifications on ACTO Omnichannel 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

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.

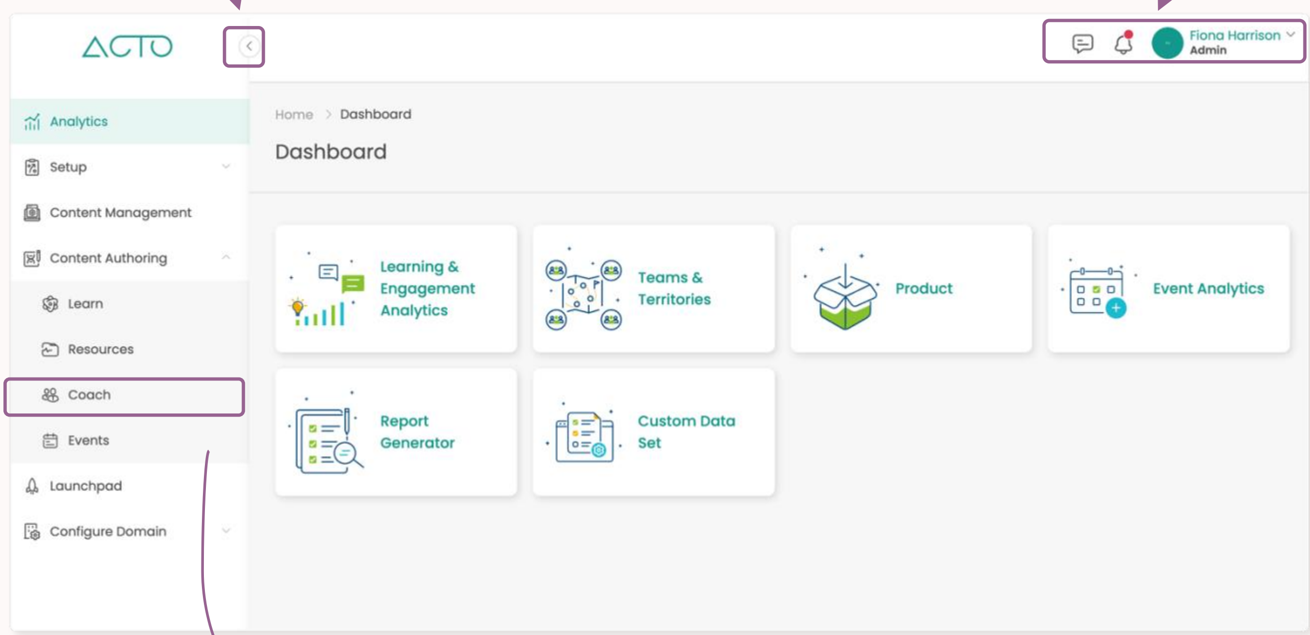
How to Access Coach

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.

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 Coach

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 **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.

1 - Admin >> Create **Assessment Form.** The same Form may be used in multiple Certifications.

→

2 - Admin >> Create the Certification in Coach Tool.

→

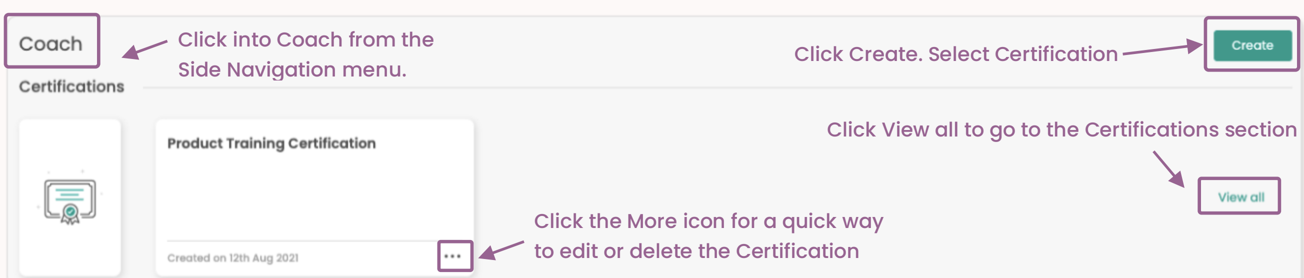
3 - Admin >> Assign the Certification to Admin or Manager roles using the **Launchpad.**

→

4 – Admin, Manager >> Use the Certification to certify team members.

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.



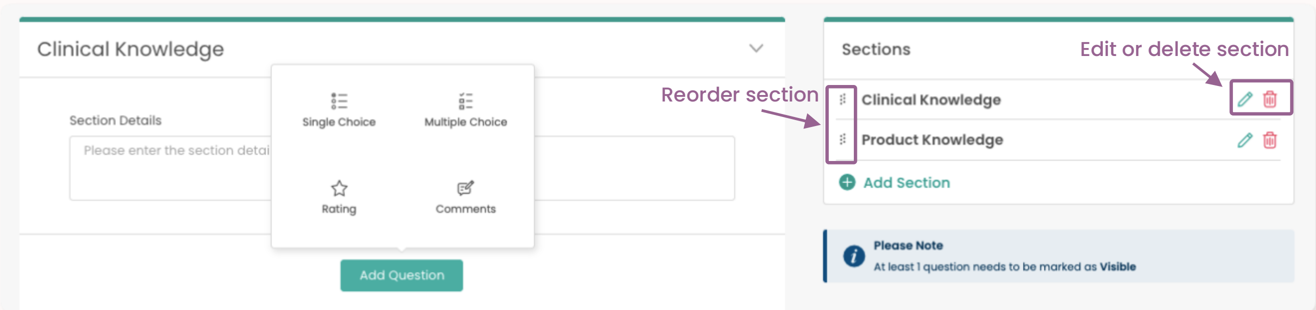
What if a team member does not pass a Certification the first time?

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 has an Assessment Form in it created by an administrative role. When other administrators are assigned to certify their team, they will use the Assessment rubric to guide them.

To get started, select Content Management from the Navigation menu. Select Forms. Within Forms click the Assessment tile. Begin to create your Assessment Form.

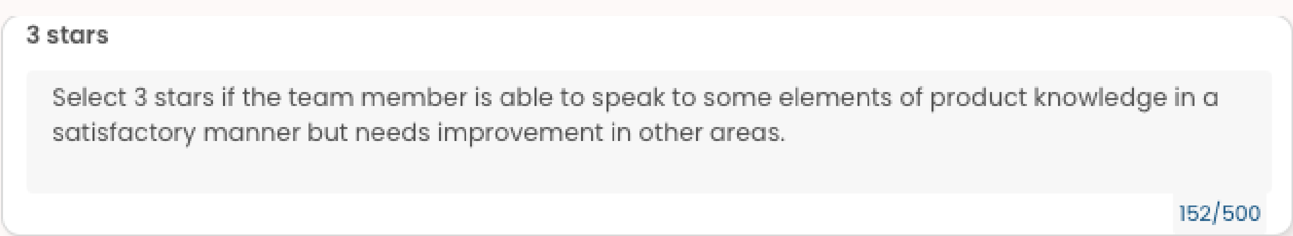


1. Enter the Assessment's basic details. Enter instructions to the certifier and set a Passing Threshold. Select your display preferences in **All-in-One-View** or **Section View**.
2. Add, name, reorder, or delete Assessment sections on the screen's right under **Sections**.
3. Add Assessment questions on the left by clicking Add Question and selecting a question type. **Reference question types on the right.**
4. 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 comments within their response.

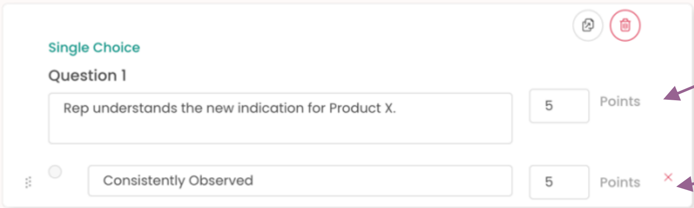
- **Single Choice** – The Manager selects the most appropriate response from provided options.
- **Multiple Choice** – The Manager selects all appropriate responses from provided options.
- **Rating** – The Manager selects a rating from one to five stars. Add a description of each star rating to clearly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

Assessment Form – Evaluation Criteria

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



Each question in the Assessment can be associated with a certain number of points, and admins may set a passing threshold for the overall Certification. Please note, adding points to an Assessment is not required.

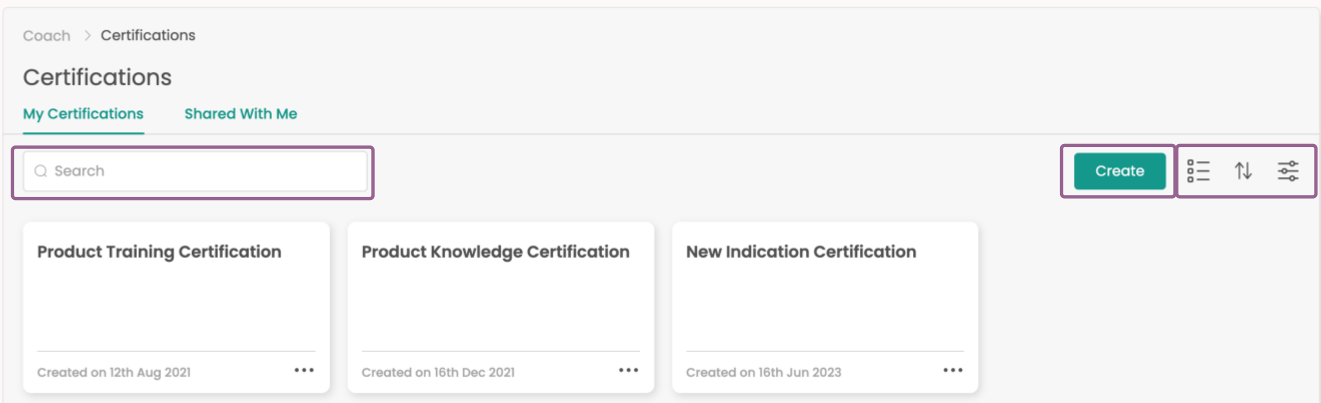


The highest number of possible points for a question is listed here in the question field.

Click into the points checkbox next to each option to edit or adjust points. If you do not want points, simply make sure this field says '0'

How to Add Details to a Certification

Once you have created an Assessment Form, you are ready to add details to a Certification. Proceed to the **Coach** tool and begin to create a Certification using the Certification wizard.



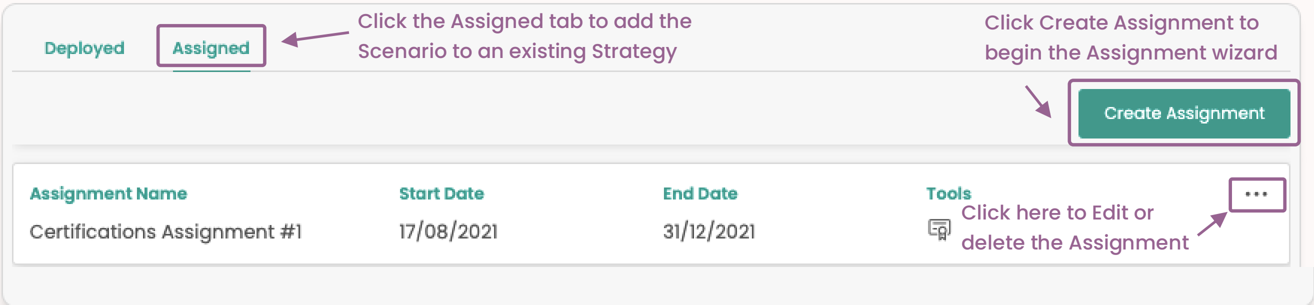
1. Click Coach from the Side Navigation menu. Click View All to get to the Certification section. To create a Certification click Create on the top of the page.
2. You may also use the Search bar or filter to find Certifications. You can view existing Certifications in a list view, or sort by name, date, or most recently created.
3. Enter details in the Certifications wizard.
4. Review the Certification details and click Complete to save.

PROTIP In the Assessment section of the Certification wizard, select the number of Certification attempts. This allows Managers to reassess and recertify end-users if they are not initially successful.

- **Essentials** – Enter the Certification's basic details.
- **Assessment** – Select an Assessment from the dropdown menu or create a new one by clicking **Add New Assessment.** Set **the allowable number of attempts to successfully complete Certification.**
- **Certifier Settings** – Set display preferences for the Certifier who will assess the learner.
- **User Settings** – Set display preferences for the user.
- **Tagging** – Select the relevant tags and keywords to associate with the Assessment.
- **Competencies** – Select the user type the Assessment will be used to certify and choose the competencies they will be assessed on.
- **Stakeholders** – Collaborators are administrators who can update or delete the Assessment based on the permissions you set for them.

How to Assign a Certification

For Managers to be able to certify end-users, Admins must first assign it to them 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 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.
- **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.

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.

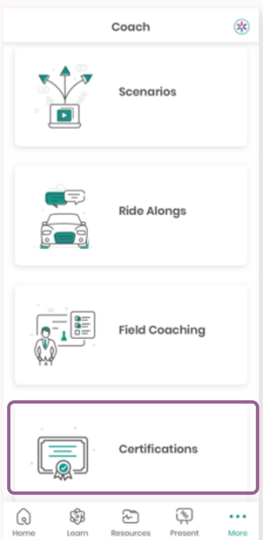
Click back to Admin Guide to Coaching Certifications Table of Contents

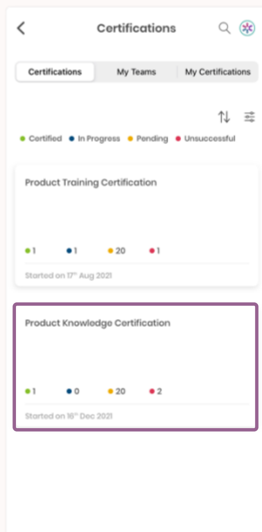
Manager Guide to Coaching Certifications

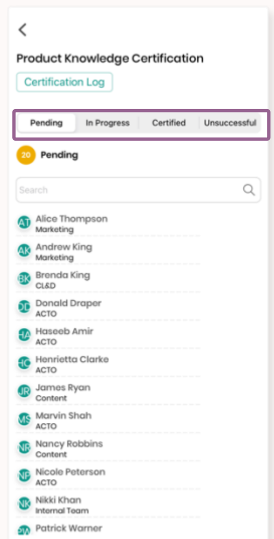
After an Admin assigns a Certifications to a Manager, the Manager can begin certifying learners. Most of ACTO's administrative features are accessible only on the web version of the platform. Coach is an exception. Managers must switch to User mode to certify end-users. This allows managers to also use 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.

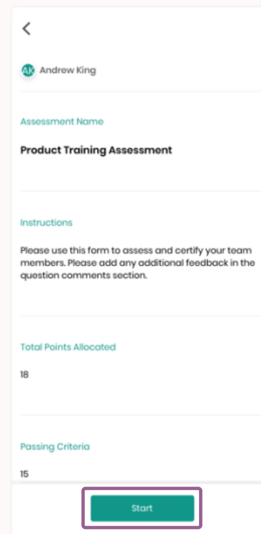
How to Certify an End-User

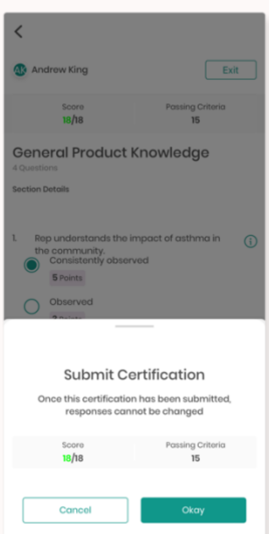
Learners can access a completed Certifications Assessment it has been submitted by their Managers.

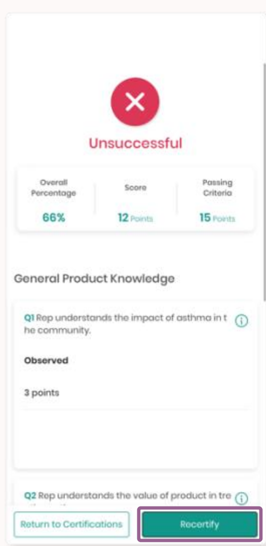












1. Click Coach from the Navigation menu.
2. Click Certifications. Then click into the specific Certification you would like to start.
3. Click through to view Pending, In Progress, Certified, or Unsuccessful certifications. Learners who are not yet certified are under **Pending**. Click into Pending 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 the Coach tool 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. Click Save to save each section and Next step to move forward.
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

Click back to Admin Guide to Coaching Certifications Table of Contents

Admin Guide to Field Coaching

Field Coaching on ACTO Omnichannel allows platform administrators to provide coaching feedback to end-users in real-time. Admin roles create **Field Coaching** within the **Coach** tool and assign it to Managers. Managers use these Field Coaching rubrics to evaluate team members during live interactions and provide them with valuable feedback using Field Coaching Reports.

Click into any of the links below to get started.

Table of Contents

Admin Guide to Field Coaching

Learning Objectives

- Understand how to create a Field Coaching Report using the Forms tool.
- Understand how to add Field Coaching to the Coach tool.
- Understand how to assign Field Coaching to Managers.
- Understand how to deploy Field Coaching to end-users.

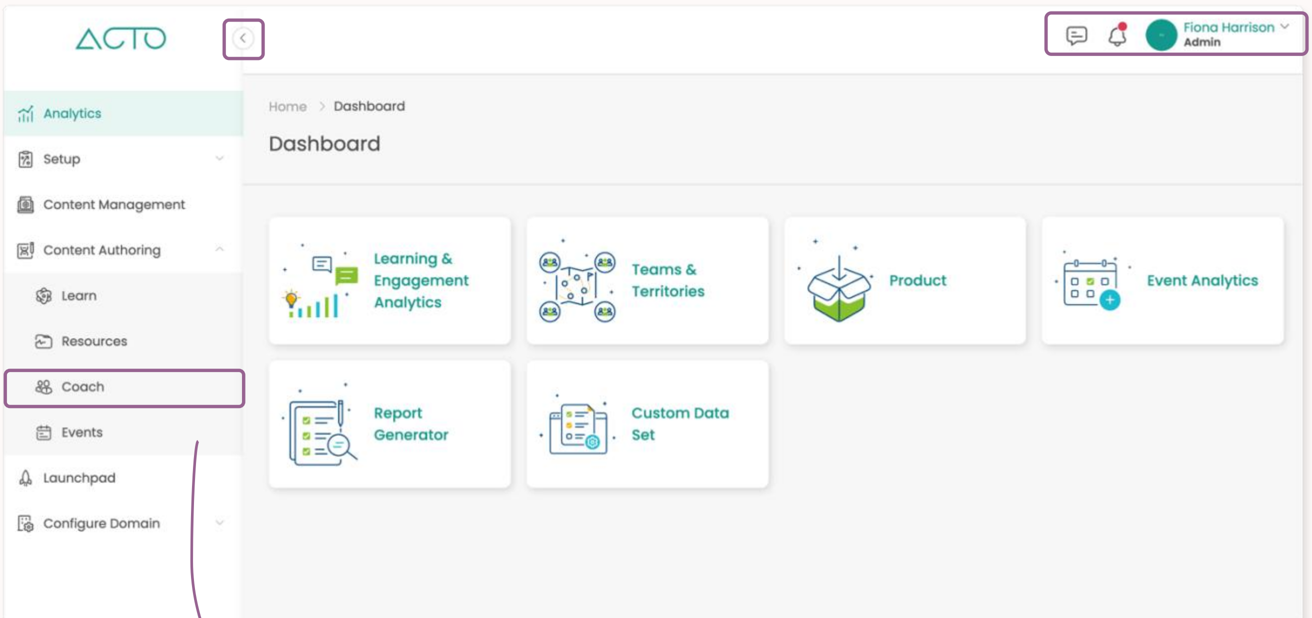
How to Access Coach

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.

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 Coach

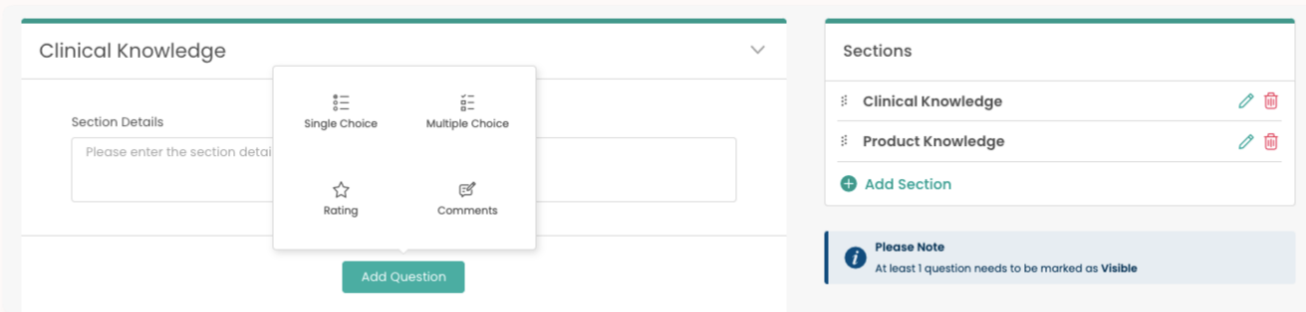
1. Log in to ACTO on your computer browser. **Please use Google Chrome or Mozilla Firefox.**
2. Make sure you are in administrative mode. <u>End-users cannot access admin functions.</u>
3. Expand the **Navigation menu** on the left of your screen.
4. Click **Content Authoring** and then select **Coach**.

Field Coaching for Admins

In the Field Coaching for Admins section, you will learn how to create a Field Coaching Report (FCR) within Forms, add the FCR to Field Coaching within Coach, and assign Field Coaching to Managers.

How to Create a Field Coaching Report

Select Content Management from the Navigation menu. Select Forms. Within Forms click the Field Coaching Report (FCR) tile. Begin to create your Field Coaching Report.

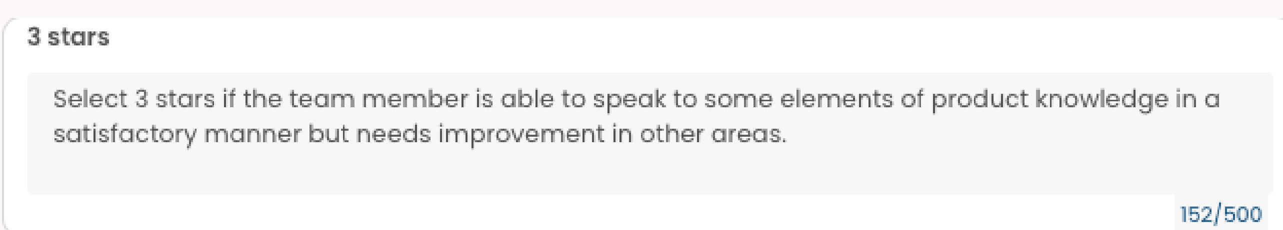


1. Enter the FCR's basic details. Select **All-in-One View** or **Section View** to display the report.
2. Add, name, reorder, or delete sections on the right of your screen under **Sections**.
3. Add questions into the FCR on the left by clicking Add Question and selecting a question type. **Reference question types on the right.**
4. 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 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** to each of the other question types to add a text field to that specific question.

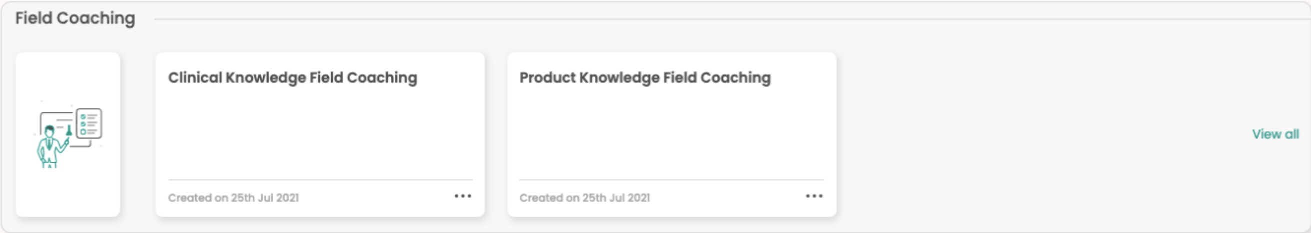
Field Coaching Report – Evaluation Criteria

When you create an FCR please note the Evaluation Description section beneath each question. This allows you to create a rubric further defining each answer option, and provide detailed evaluation criteria to Managers as they assess their teams.



How to Add Field Coaching to Coach

Before assigning an FCR to a manager you must create context around it. To do this please create Field Coaching associated with an FCR within the Coach tool.



1. Click Coach from the Side Navigation menu. To create Field Coaching click Create on the top of the page and select Field Coaching.
2. You may also click View all next to the Field Coaching Section on the main Coach page to access all your Field Coaching or to create new Field Coaching.
3. Enter details in the new Field Coaching wizard.
4. Review the Field Coaching details and click Complete to save.

PROTIP As you proceed through the Field Coaching wizard, click **Save** after each section. Click **Next Step** from the wizard menu to move forward.

- **Essentials** – Enter the Field Coaching name and an optional description.
- **Field Coaching Report** – Select a Field Coaching Report from the dropdown menu or create a new one in Forms by clicking **Add New Field Coaching Report.**
- **Tagging** – Select the relevant tags and keywords to associate with the Field Coaching.
- **Competencies** – Select the user type the Field Coaching will be deployed to and choose the competencies they will be assessed on.
- **Collaborators** – Collaborators are other administrators who will be able to update or delete the Field Coaching based on the permissions you set for them.

How to Assign Field Coaching to Managers

For Managers to deploy Field Coaching to end-users, Admins must first assign it to them 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 assign Field Coaching from there.
3. On the Strategy page click Assign. Then select the Field Coaching option.
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. Select the assignment and due date for each.
- **Proctors** – Select Proctors to add to the Field Coaching. Proctors are Manager or Admin roles who can use start Field Coaching with users.

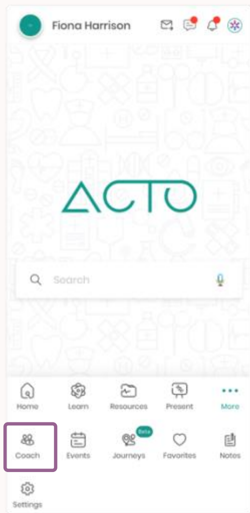
[**Click back** to Admin Guide to Field Coaching Table of Contents]

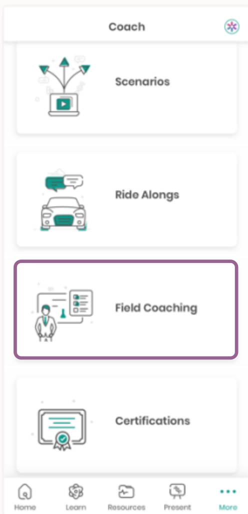
Manager Guide to Field Coaching

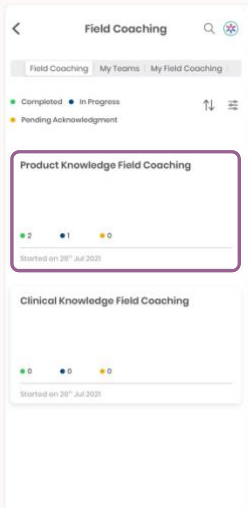
Once an administrator assigns Field Coaching to a Manager using the Launchpad, the Manager can start using the Field Coaching Report (FCR) with their team members. This is done by selecting a team member for Field Coaching, and then filling out the report while evaluating the team member in the field.

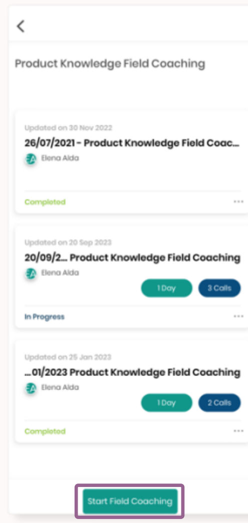
How to Start a Field Coaching

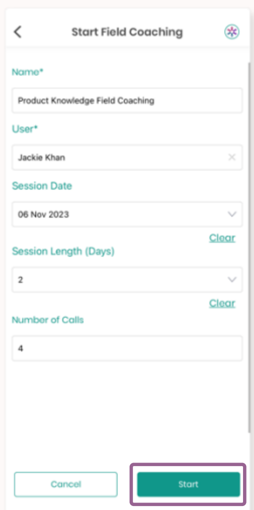
Most of ACTO's administrative features are found on the web version of the platform. **The Coach tool is one of the few exceptions. Managers and other Admin roles must switch to User mode for Field Coaching.** This allows managers to also use mobile devices to evaluate their team members.

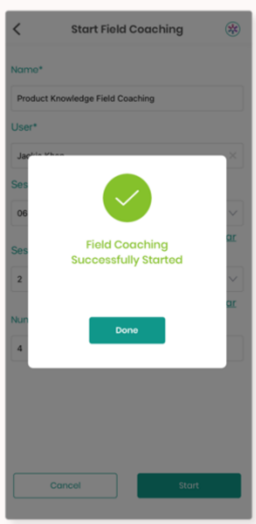










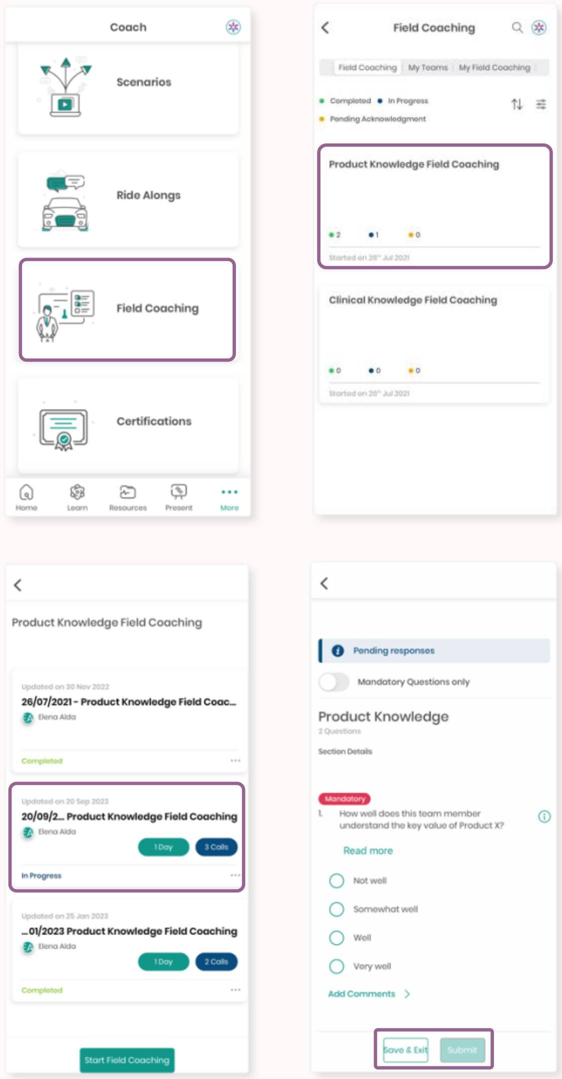


1. Log into the ACTO iOS app on your mobile device. Click **Coach** from the navigation menu.
2. Click **Field Coaching**. Select the specific FCR you would like to use. Then click **Start Field Coaching**.
3. Select the team member you would like to assess using the dropdown menu. You may enter a start date for the session, the session length, and the number of calls that will take place during the session as applicable.
4. Click **Start** to begin.

PROTIP Managers may also use Field Coaching on the web version of the platform. Simply log in and click the dropdown arrow next to your name. Select Switch Role – User. Then click into Coach. End users will not be able to access the completed FCR until it has been submitted by their Managers.

How to Submit Field Coaching

Once you have completed an FCR for a team member, click **Submit**. The user will then be able to access the completed FCR on their end.



1. Click into **Coach** from the Navigation menu. Select **Field Coaching**.
2. Click into the FCR for which you would like to enter responses.
3. Click into the FCR for the specific end-user you would like to assess.
4. Enter your responses to the report. You may click **Save & Exit** to pause the assessment and continue later. Once you have completed the FCR, click **Submit**. Once you submit you will not be able to go back and make changes.

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

Admin Guide to Journeys

Journeys on ACTO Omnichannel allows you to develop learning solutions that efficiently and effectively deliver personalized learning. It gives your learners an intuitive and customizable learning experience that allows them to train at their own speed, and in their chosen way.

Click into any of the links below to get started.

Table of Contents

Admin Guide to Journeys

Learning Objectives

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

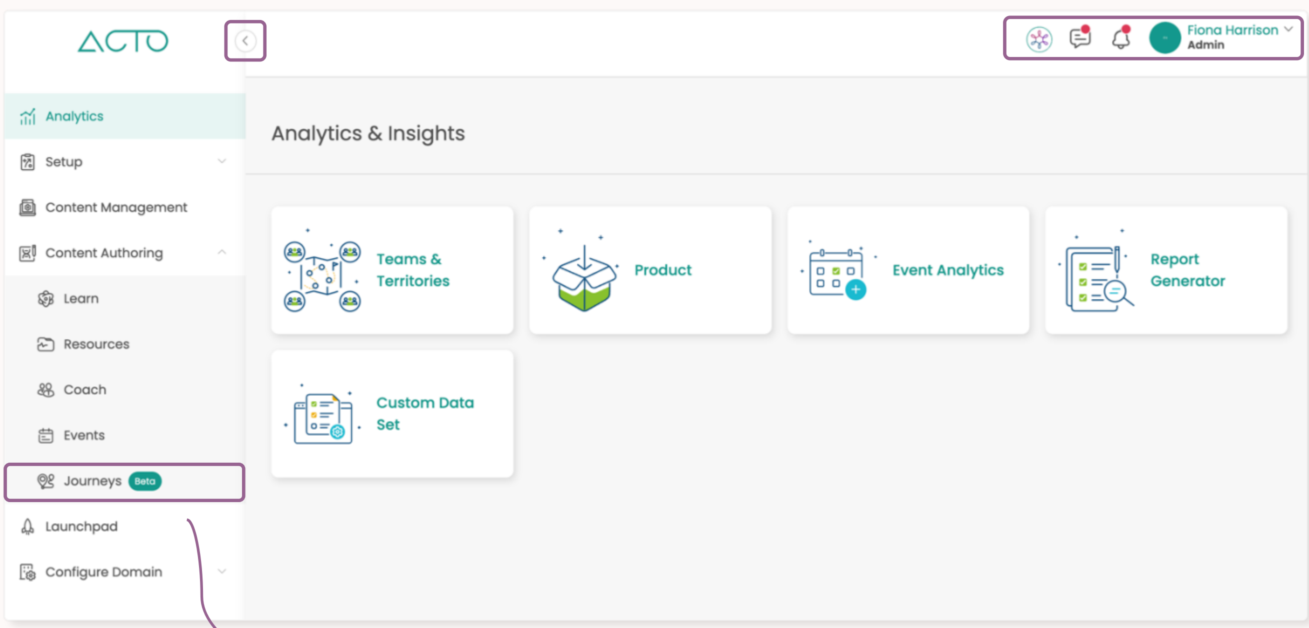
How to Access Journeys

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.

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

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

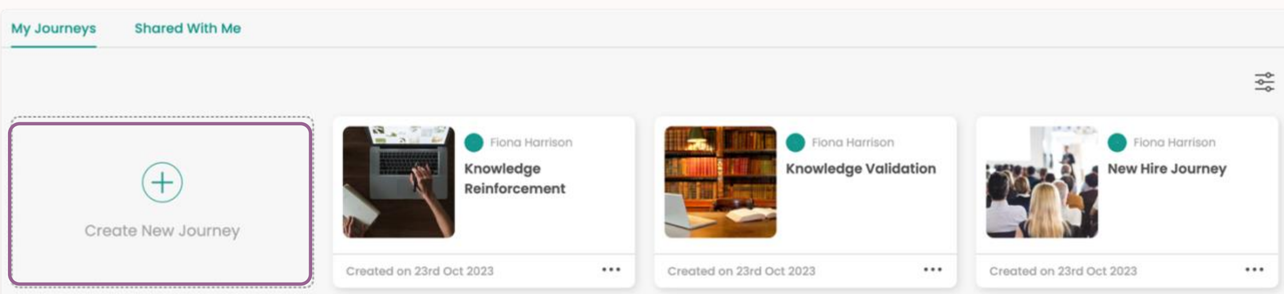
Journeys Quick Overview

- Journeys move 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 leverage training and resources from **Learn**, **Content Management**, and **Forms**.

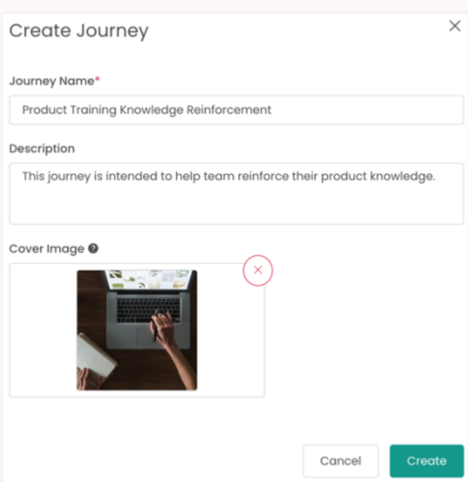
Map out the different paths and conditions of the journey. → Create a new Journey. → Add resources and conditions to the Journey as applicable. → Deploy the Journey to learners.

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.



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

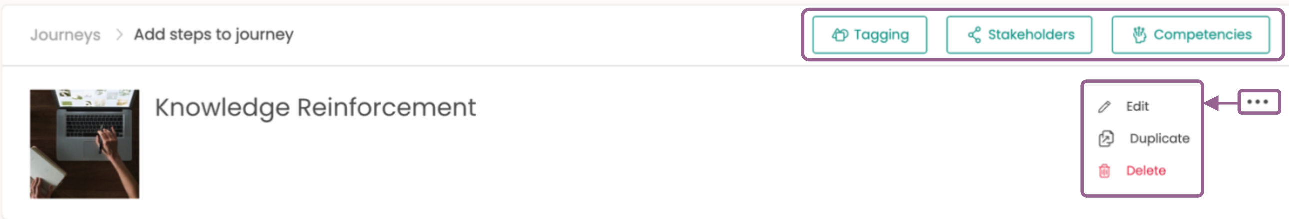
Description – Write a brief description of the journey. Please note, only other administrators will be able to view this description.

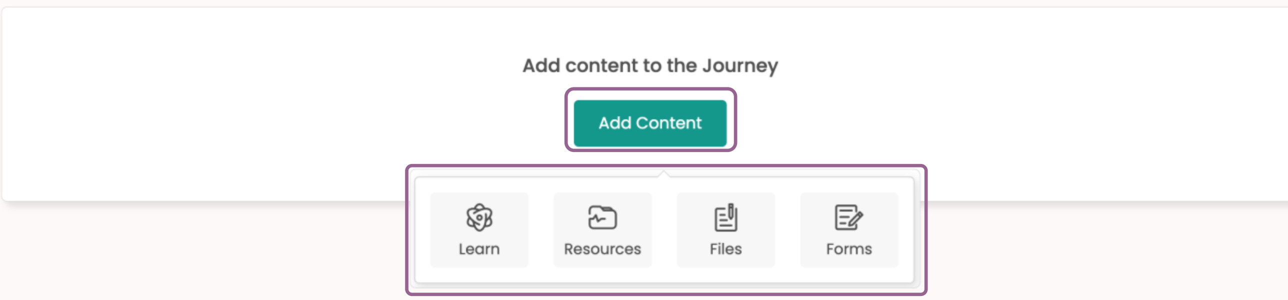
Cover Image –.Adding a cover image differentiates the journey from others, and adds to a more engaging user experience.

How to Build out a Journey

After creating a journey, begin to build it out. On the homepage for each specific journey, you may add **Tags**, **Competencies**, and **Stakeholders** for content collaboration.

You may also add content and resources from **Learn** and **Resources**, individual **Files**, and **Forms** like quizzes, surveys, digital signatures. Once you begin adding content, you can start to create divergent pathways and specific conditions for each part of the journey.

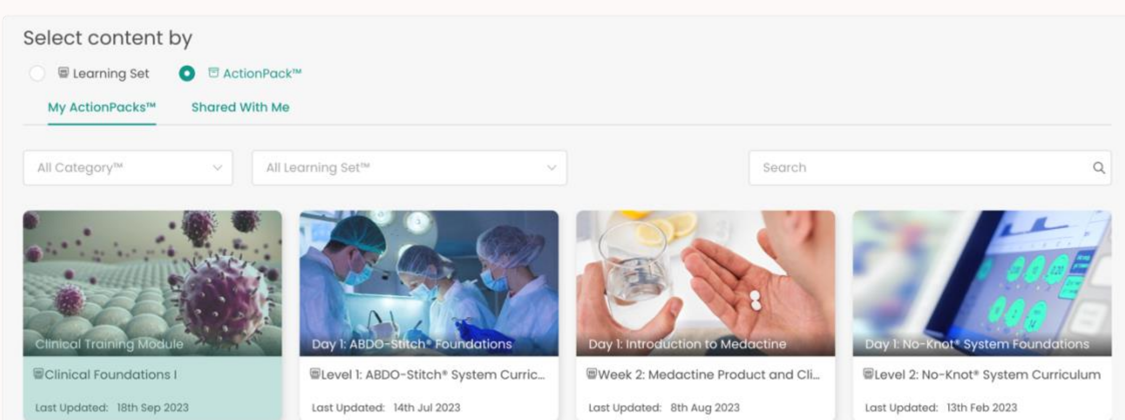




PROTIP Once you have created a deployed a journey, you are no longer able to edit or change it in any way. This is where the duplicate function comes in handy, allowing you to recreate and edit an existing journey.

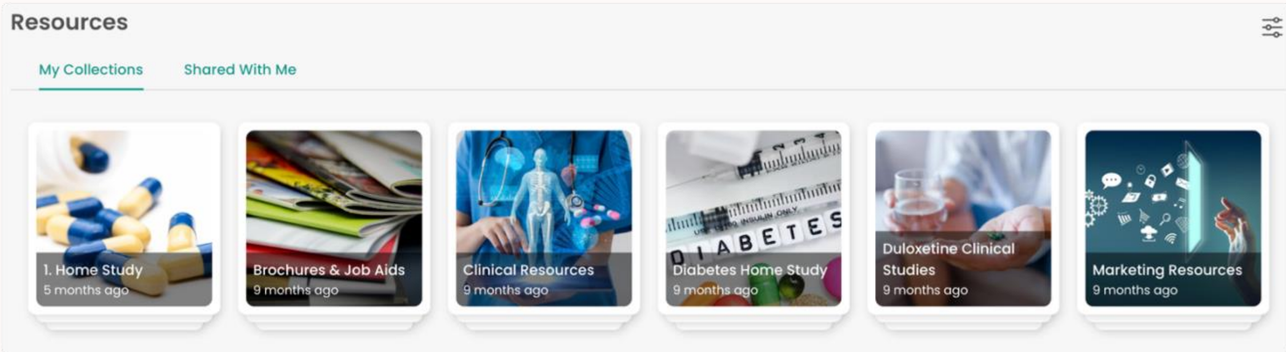
How to Add Content from Learn into a Journey

To add content from Learn into a journey, click Add Content and select Learn. Then select and filter content by **Learning Set** or **ActionPack**. Once selected, click Add Learning Sets or Add ActionPacks as applicable.



How to Add Content from Resources into a Journey

To add content from Learn into a journey, click Add Content and select Resources. Then select the **Collections** you would like to add to the journey. Once selected, click Add Collections.



How to Add Files into a Journey

You can add assets (files) to a journey. Click Add Content and select Files. Then select the specific assets you would like to add to the journey. You may filter resources by file type. Once selected, click Add.

How to Add Forms into a Journey

You can add forms to a journey. Click Add Content and select Forms. Then select the specific form you would like to add to the journey. You may filter forms by **Survey**, **Quiz**, and **Digital Signature**. Once selected, click Add.

How to Add Conditions to a Journey

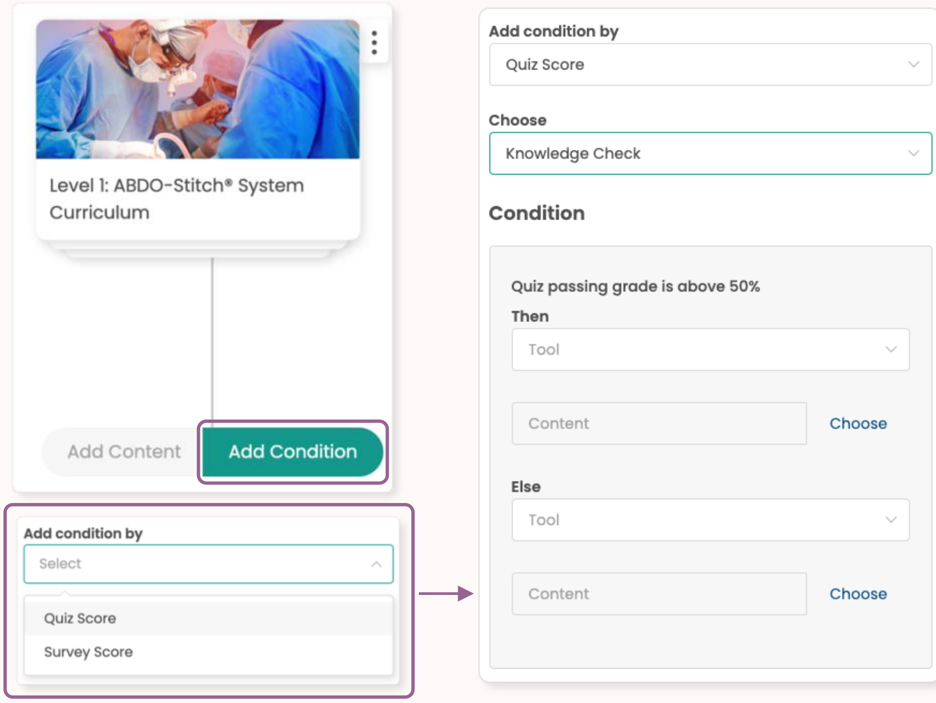
You have started your journey by adding content from **Learn**, **Resources**, **Forms**, or **Files**. Once you add one asset, you may add another, or you may add a condition related to a learner's **quiz score** or a **survey score**.

You may add conditions to **ActionPacks**, **Learning Sets**, **Quizzes**, and **Surveys**. This means that the learner's next step along the journey is determined by the condition attached to of the aforementioned pieces of content.

EXAMPLE Sarah completes one of three New Hire Onboarding ActionPacks on her journey. Once it's complete, she must complete a quiz. Her administrator has set it up so that if Sarah achieves a score of 85 percent or more on the quiz, she is able to test out of a the second ActionPack, and proceed directly to the third. This condition ensures that those learners who do not pass a certain threshold are exposed to more training reinforcement, while those who do are able to move forward on their learning journey.

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

If you are able to add a condition to a resource in the journey, you will notice an Add Condition option underneath the resource. If you do not see this, it means you are not able to add conditions to the asset.



Click Add Condition next to a resource.

Select if the condition is related to a Quiz Score or Survey Score.

Select the quiz or survey to apply if your resource is a Learning Set or ActionPack. If the resource is already a quiz or survey, then these fields will be

Set the conditions for what content the learner moves on to depending on their quiz score or survey response.

Journeys FAQs

What does testing out a journey mean? Testing out of a journey means the learner is allowed to test out of a learning module (for example) if they pass a certain quiz or survey threshold, and move on to the next part of the journey. If they do not pass the set threshold, they would be required to complete the module as per the conditions pre-set by the journey's administrator. Testing out compliantly allows learners to demonstrate pre-existing knowledge so they may accelerate through material they already know.

What happens if content needs to be adjusted after a journey has been deployed? Content like Learning Sets, ActionPacks, quiz questions, 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.

What kind of reports are available for auditing purposes? The Overall Journey Report outlines learners' progress along their respective 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 will trigger 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 will 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

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

Admin Guide to Events

Learning Objectives

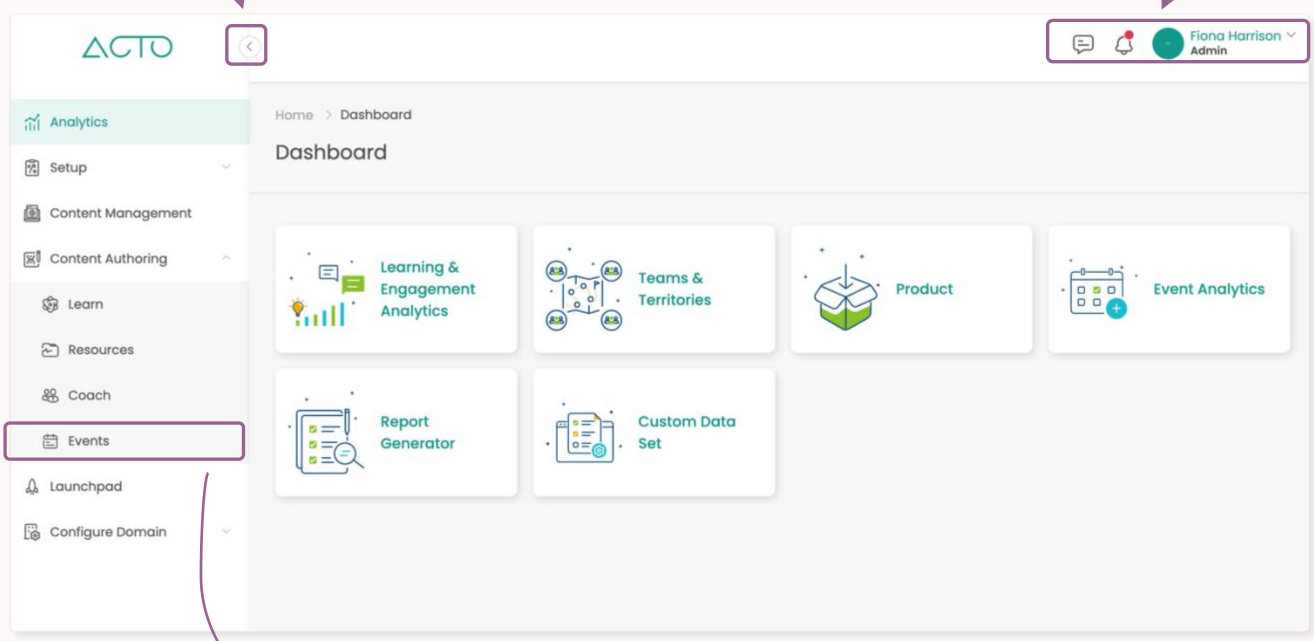
- Understand how to add and update sponsors and speakers to events
- Understand how to create agendas for events including tracks and sessions
- Understand how to link resources and prework to event sessions
- Understand how to assign an event to Event Managers
- Understand how to deploy an event to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

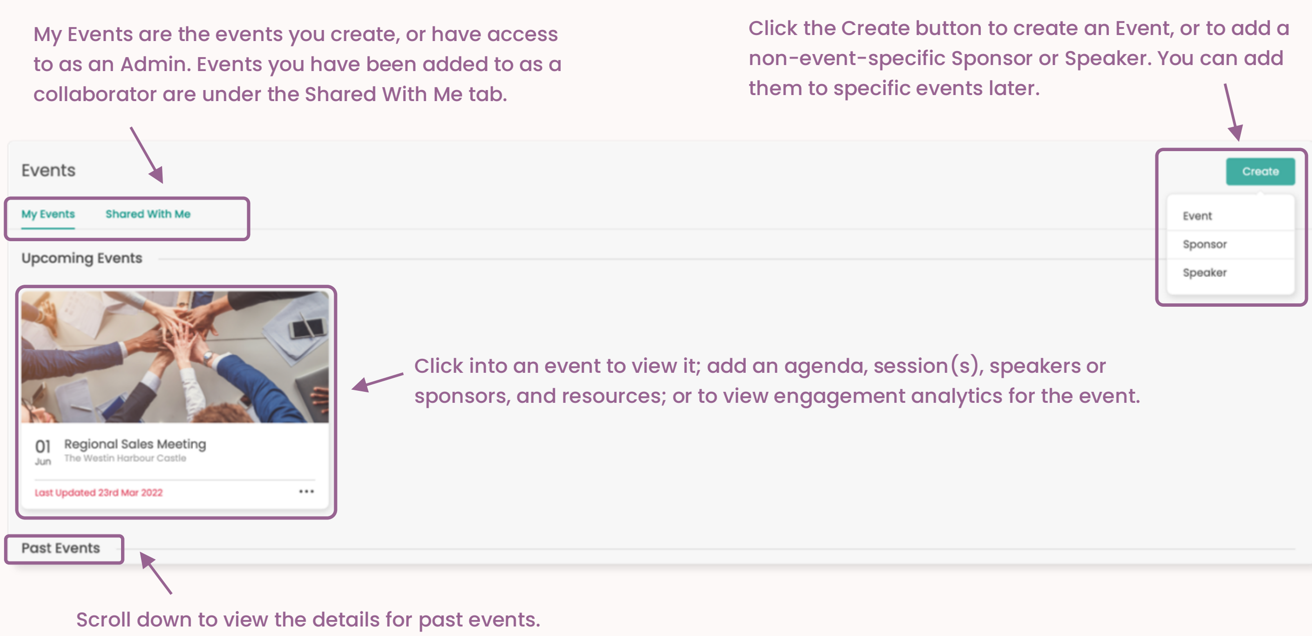
1. **Admin >** Create a Registration Form. The same form may be used for multiple events.

→ 2. **Admin >** Create the Event. Add agenda, tracks, sessions, prework training, and other collaborators.

→ 3. **Admin > Use the Launchpad to** assign the Event, to Event Managers (Manager, Admin, Draft Manager)

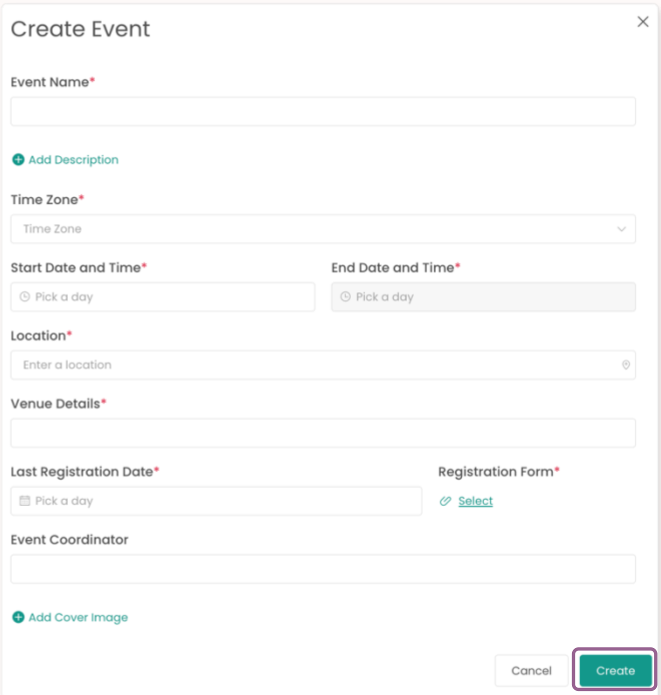
→ 4. **Admin, Manager, Draft Manager >** Deploy the assigned event to end-users (the event invitees).

The Events Page Overview



How to Create an Event

The Events wizard walks you through building out an event. To get started, click Create on the top-right of the Events page. Select Event. Then, enter the details required by the pop-up wizard.

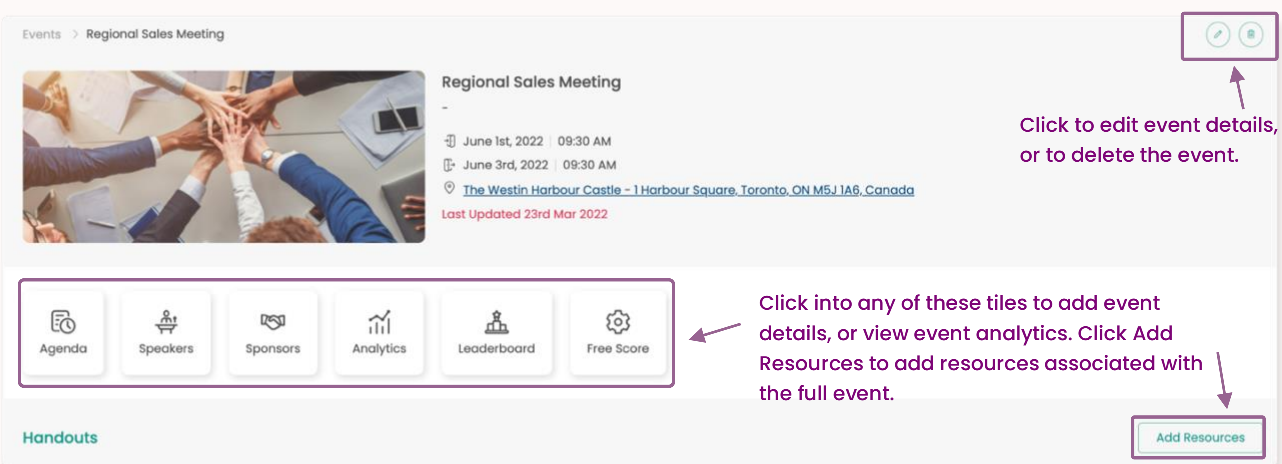


1. Event Name - Enter a name for the event.
2. Add Description – Add an optional administrative-facing description.
3. Time Zone – Select the event's time zone.
4. Date and Time – Select the start and end dates, and times for the event.
5. Location and Venue Details – Enter the event location, and additional 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 cover image for the event.

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 select **Agenda, Speakers, Sponsors, or Add Resources.**



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 Content Authoring from the Side Navigation menu and select Events.
2. Click into the Event you would like to add a sponsor to. Click Sponsors. Then click the Add Sponsor button.
3. Enter the event sponsor name and a description. Then upload the sponsor logo (required). Click the Add Sponsor button.
4. 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.
5. 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

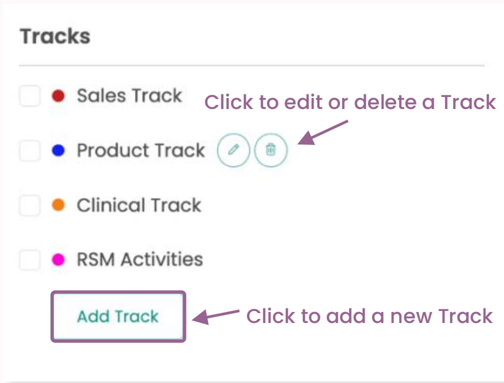
Speakers may be added to specific Events. Speakers that are not event-specific, or will be a part of multiple events, may also be created within the main Events tool and then selected for specific events. Please create speaker profiles before creating event sessions so that they can be added into sessions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

1. Click Content Authoring from the Side Navigation menu and select Events.
2. Click into the Event you would like to add a speaker to. Click Speakers. Then click the Add Speaker button.
3. 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.
4. 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.
5. 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

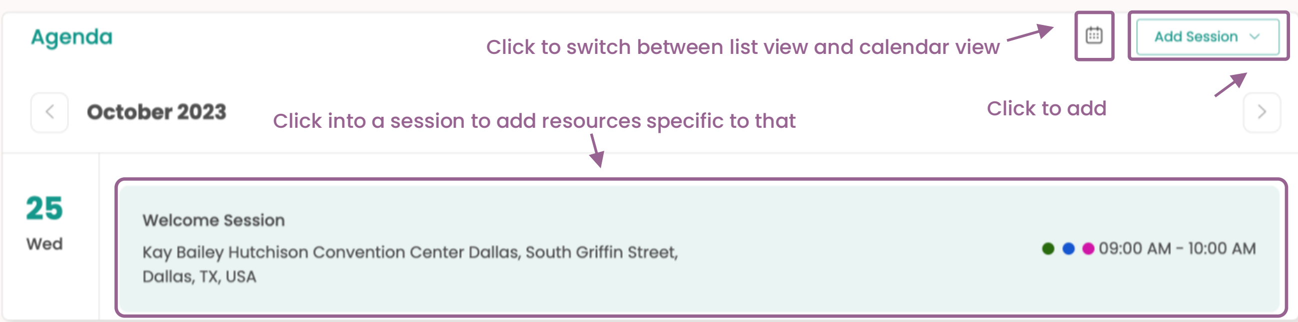
An event agenda is made up of tracks and sessions. **It is required to create tracks before creating sessions for the event so that you may organize and link each session to a specific track.**



1. Click **Events** from the Side Navigation Menu. Click into the specific event you would like to add a track to. Click **Agenda**. Click **Add Track** on the left side of the page. Enter a track name. Select a color for the track.
2. Click the **Pencil icon** next to a track to edit it. Click the **Trashcan icon** to delete it.
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

You can add one session at a time to an event, or bulk upload multiple sessions at once. 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.
- **Description** – Add a description of the session.
- **Start and End Date and Time** – Use the dropdown to select start and end dates and times for the session.
- **Venue** – The name of the venue.

- **Place** - Select the specific location in the venue the session will take place.
- **Tracks** – Click the dropdown to select the track this session is a part of.
- Session Coordinator – Add the name of the session coordinator (optional).

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.

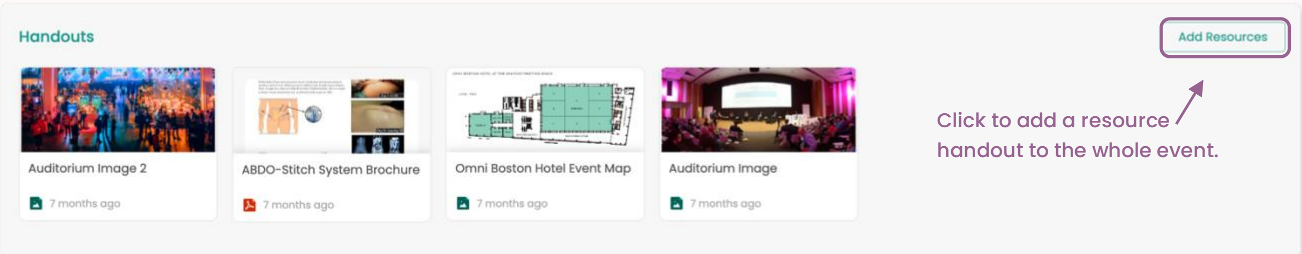
Once you have populated and reuploaded the bulk session template, click View Details to review it. Here you'll be able to make any edits and resolve potential errors before finalizing. Click the **Pencil icon** to edit the details within a session. Click the **Trashcan icon** the delete the session.

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 +1	26/10/2023 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.

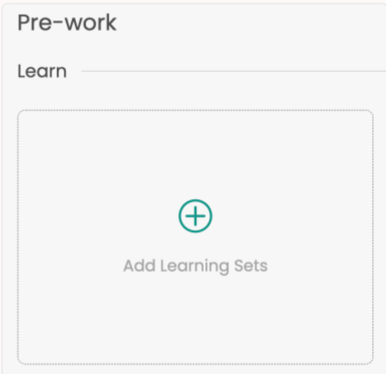
How to Add Resources to an Event

You can link handout resources to the full event – for example, travel information, or other event related information. To do so, click into the event page. Then click the Add Resources button and select individual resource from the Content Management tool.



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.

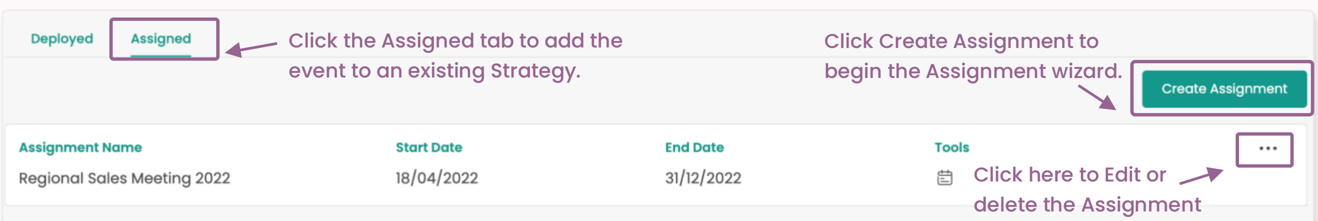
You can also add resources to individual sessions within an event. **You can add both pre-work, and handouts to a session. Pre-work refers to Learning Sets or Collections from ACTO's Learn and Resource capabilities. Handouts are individual resource files.**



1. Click into an Event. Then click into the Event Agenda.
2. Find the session(s) you would like to add pre-work and resources into. Click into it.
3. To add Learning Sets to the session, click Add Learning Sets under the Pre-work header. To add Collections to the session, click Add Collections under the Pre-work header.
4. To add individual resources to the session, click Add Resource under the Handouts header.

How to Assign an Event

For Event Managers 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.



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.

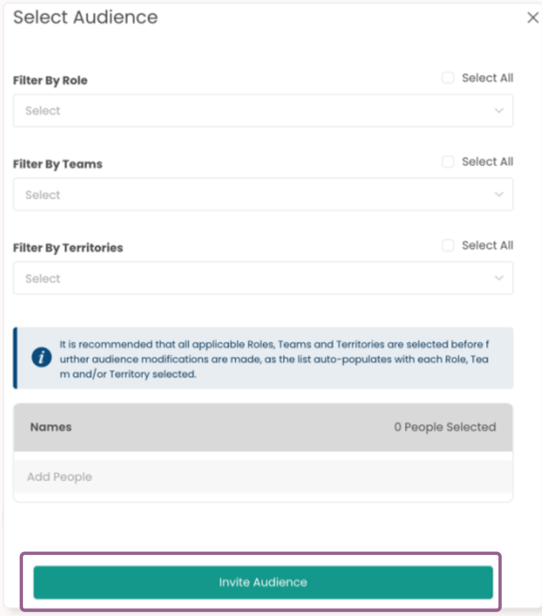
- **Essentials** – Enter the event name and its start and end date (required).
- **Event** – Add the event. Click Schedule and add a date to schedule the assignment. If you select Now, the event is immediately assigned.
- **Event Managers** – Select your Event Managers i.e., the Manager, Draft Manager,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

  NOTE – Even the Admin Assigning the event will need to add themselves as an Event Manager to be able to deploy the event to end-users.

PROTIP 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 assigned event to end-users.

How to Deploy an Event – Event Managers

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.



5. Click the arrow next to your name on the top-right and select **Switch Role - User**.
6. Click into Events from the Side Navigation menu. Then click the Manage Events tab.
7. Click into the event you would like to deploy. Click the Agenda button. Select the session you would like to invite users to, then click the Add **Audience** button.
8. Select who to deploy the event to – you may filter by **Role, Team, Territory, or Name**. Then click the Invite Audience button.

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.

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 **Prework 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. **Prework 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]

Admin Guide to Launchpad

The Launchpad on ACTO is the **control center** for managing and launching an organization's strategies. Launches are built out based on six strategic initiatives: **Line Extensions, Product Launches, New Indications, New Trial Data, New Hire Onboarding, and New Coaching Programs**. After selecting a launch strategy, platform administrators fill in details, link training and resources, and deploy or assign the initiative using the Launchpad.

Click into any of the links below to get started.

Table of Contents

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.

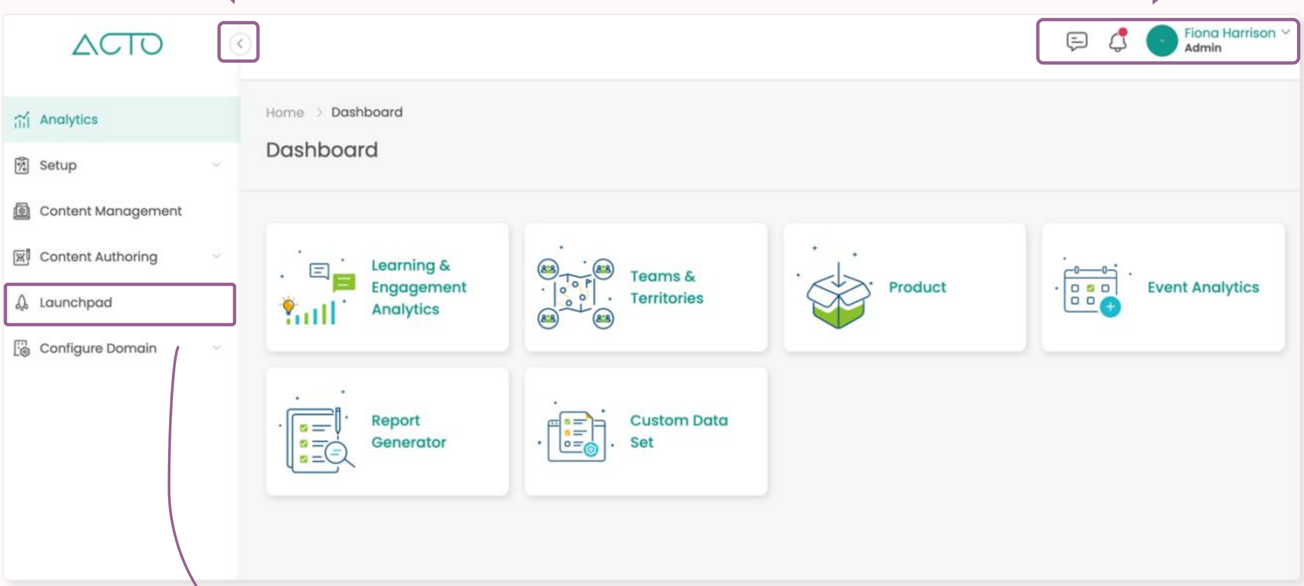
How to Access the Launchpad

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.

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 Launchpad

1. Log in to ACTO on a computer. **Please use Google Chrome or Mozilla Firefox.**
2. Make sure you are in administrative mode. <u>End-users cannot access admin functions.</u>
3. Expand the **Navigation menu** on the left of your screen.
4. Click **Launchpad.**

Launchpad Quick Overview

- ACTO's **Launchpad** is the **control center** for managing, assigning, and deploying an organization's training, resources, coaching, and event strategies.
- The Launchpad comprises **strategies**, **deployments**, and **assignments**. Currently, strategies may only be created around the following six initiatives: **Line Extensions, Product Launches, New Indications, New Trial Data, New Hire Onboarding, and New Coaching Programs.**
- Once a strategy has been created, deployments and assignments may be added to that strategy.
- A **deployment** is when the Learning Sets, VILTS, and/or Collections related to a strategy are deployed to end-users direct from the Launchpad.
- An **assignment** is when the Field Coaching, Coaching Scenarios, Coaching Certifications, or Events from the Events tool related to a strategy are assigned to platform administrators using the Launchpad. These administrators can then deploy the above resources to end-users and teams from their user accounts.

Launchpad Workflow

The Launchpad allows you to launch strategic initiatives to your team members. Keep in mind the difference between **deployments** and **assignments**. A deployment lets you push content or resources directly to end-users. An assignment allows you to assign the pushing of coaching resources or events to other platform administrators - who deploy these resources to end-users from their own accounts, and not the Launchpad.

1. Choose a strategy for the deployments and assignments you will launch. Fill out the strategy wizard.

2. Add a deployment to your strategy. Select training or resources to deploy to end users.

3. Add an Assignment to your strategy. Select coaching resources or events to assign to other

4. Deploy resources to end-users or assign resources to other administrators who can deploy them.

Launchpad Strategies

Currently, when building out a strategy you may select from the following six options:

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.

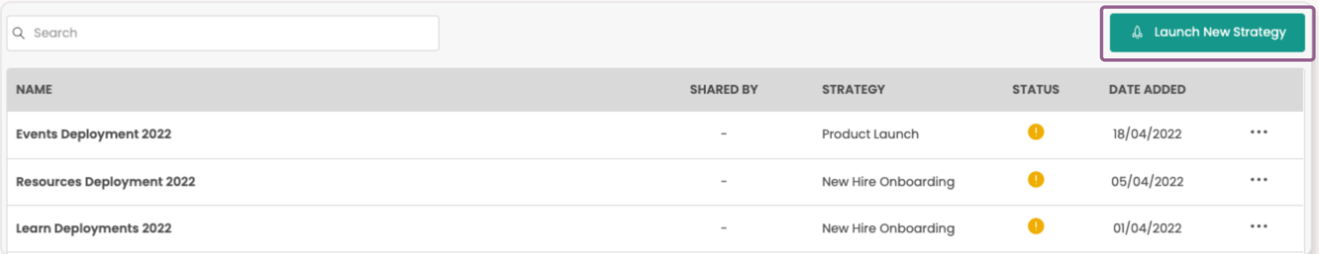
New Trial Data – Use this strategy when sharing new information resulting from clinical studies or trials.

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 Launch a New Strategy

All deployments and assignments created in the Launchpad must exist within a strategy. A given strategy can have multiple deployments and assignments associated with it.



NAME	SHARED BY	STRATEGY	STATUS	DATE ADDED
Events Deployment 2022	-	Product Launch		18/04/2022
Resources Deployment 2022	-	New Hire Onboarding		05/04/2022
Learn Deployments 2022	-	New Hire Onboarding		01/04/2022

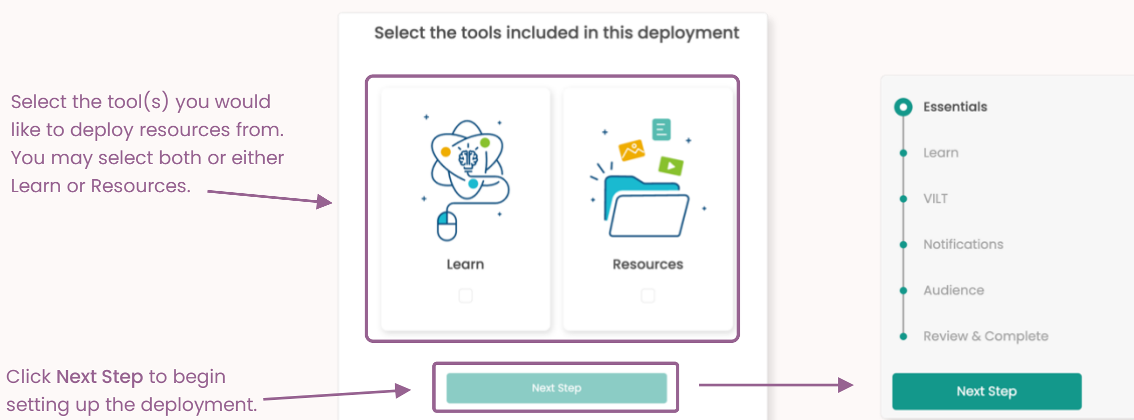
1. Select Launchpad from the Navigation menu. Click Launch a New Strategy and select the type of strategy you would like to launch.
2. Please proceed through the strategy wizard. Fill out each of the sections listed on the right.
3. **Review & Complete** - Review all the information you have entered and click Complete.

- **Essentials** - Enter the strategy name, start and end date, products associated with the strategy (optional) and a description (optional).
- **Stakeholders** - Add platform administrators who can collaborate on the launch and select appropriate permissions for them.

What Can You Do Within a Strategy? **Deploy** Learning Sets and VILTs created in the Learn tool. Deploy Collections created in the Resources tool. **Assign** Scenarios, Field Coaching, and Certifications created in the Coach tool. Assign events created in the Events tool.

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 get started, click into the strategy you would like to add a deployment to and select Create Deployment or Deploy.



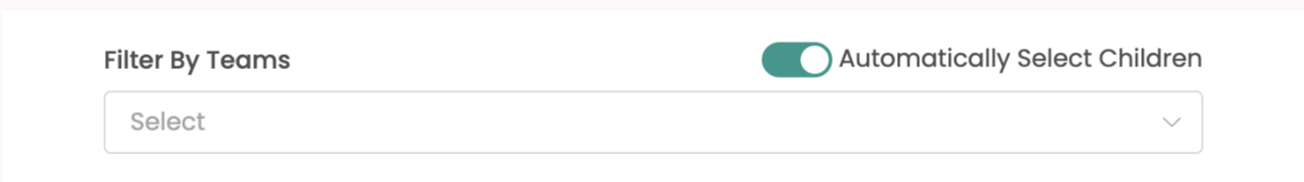
The deployment wizard walks you through each step of creating a deployment. As you go through the wizard, please make sure to click Save and Next Step after each section you complete.

- **Essentials -** Enter the name, start and end date, and an optional description for the deployment. The start and end date refer to the entire deployment. Each specific resource that is deployed can be individually scheduled.
- **Learn -** Add **Learning Sets** to the deployment. You may deploy the content immediately, or schedule it for a specific day and time.

- **VILT** – Add VILTs to the deployment. You may deploy immediately, or schedule.
- **Resources -** Add **Collections** to the deployment. You may deploy immediately, or schedule.
- **Audience -** Select teams and users to deploy to. Please note, instructors for VILTs must be added as users to the deployment.

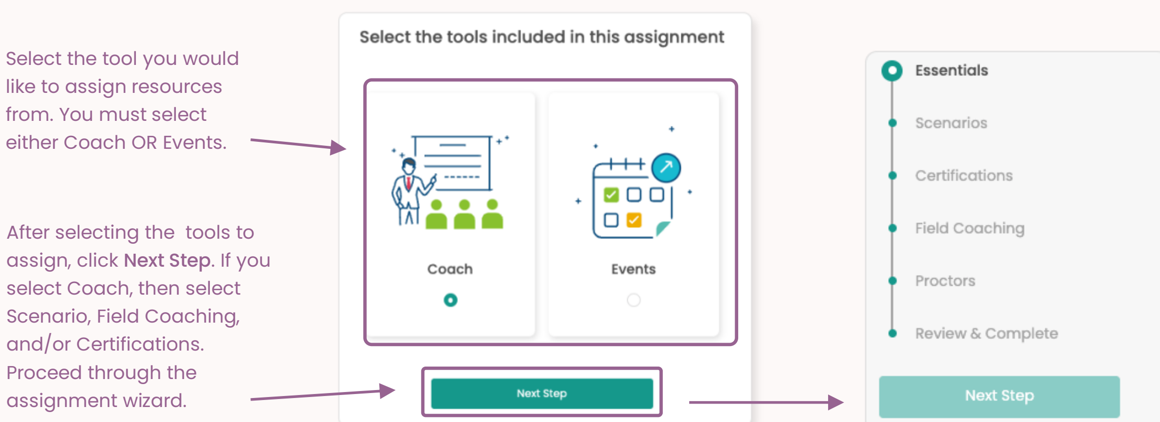
How to Select an Audience for Deployments

When deploying content to an Audience, you may filter by Role, Team, Territory, or search for and add 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, you may 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 Create Assignment or Assign.



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 for the assignment. The start and end date refer to the entire assignment. Each specific resource that is assigned can be individually scheduled.

If assigning an Event:

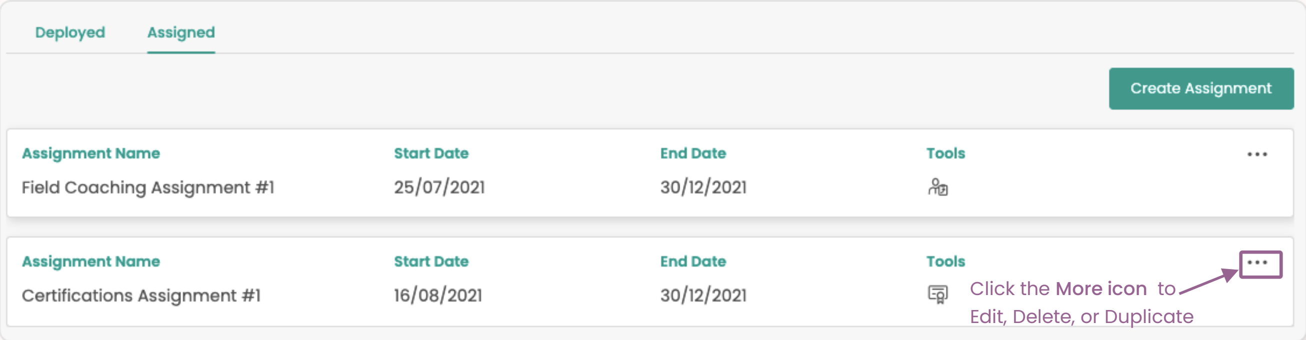
- **Events -** Add **Events** to the assignment. You may assign immediately, or schedule.
- **Event Managers** – Event Managers are other platform administrators who can manage an event – meaning, deploy it to end-users. Default Admin, Manager, and Draft Managers can fulfill the role of Event Manager.

If assigning Coaching:

- **Scenarios -** Add **Scenarios** to the assignment. You may assign immediately, or schedule.
- **Certifications** – Add a **Certification** to the assignment. You may assign immediately or schedule. You may also select a due date.
- **Field Coaching -** Add **Field Coaching** to add to the assignment.
- **Proctors -** Select the platform administrators 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.

How to Edit a Deployment or Assignment

After resources are deployed or assigned, they may be deleted from the deployment or assignment. If this happens, users will lose access to that content. Deployments and Assignments may also be duplicated. This allows you to recreate a deployment or assignment without needing to re-add all resources and audience.

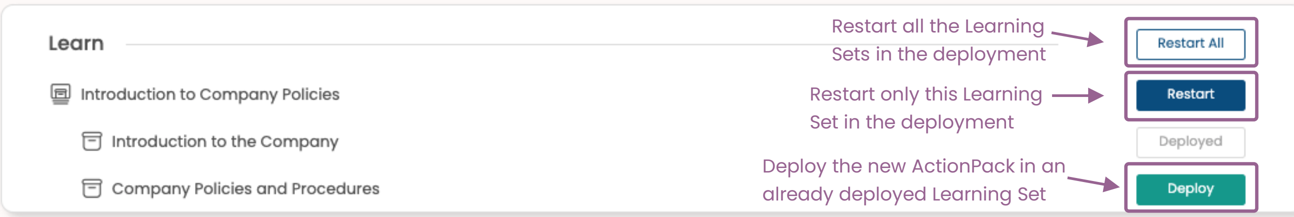


When a Deployment or Assignment is Edited…

- You may update essential details including start and end date.
- You may delete training or resources associated with the deployment or assignment.
- You may select new users, teams, or proctors to deploy or assign the resources to.

How to Update an Existing Learn Deployment

Once Learn resources have been deployed, you may restart Learning Sets for individual users as needed. You may also deploy new ActionPacks that have been added to an already deployed Learning Set. This makes it easy to deploy updated content without needing to create a new deployment.

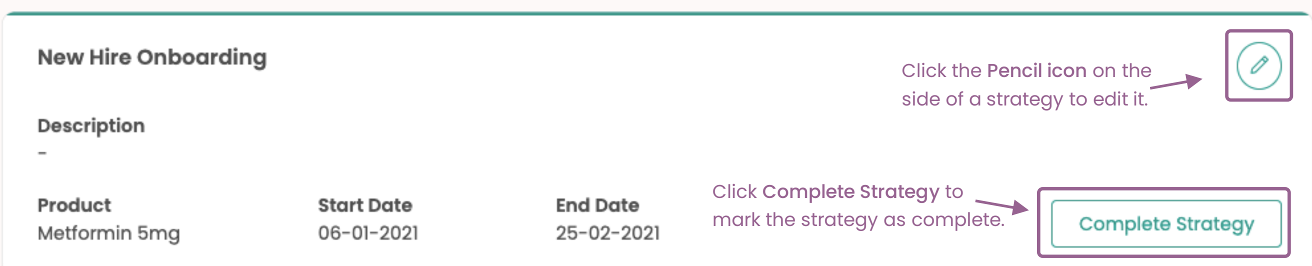


- Click into the strategy in which you would like to update a deployment. Click the **More icon . . .** on the right side of the deployment. Select **View**.
- Click **Restart All** to restart one or more ActionPacks within all the Learning Sets in this deployment. Select the ActionPacks to deploy, Click **Next**. Select end-users. Click **Restart**.

- Click **Restart** to restart one or more ActionPack within a particular Learning Set in this deployment. Select the ActionPacks to deploy. Click **Next**. Select end-users. Click **Restart**.
- Click **Deploy** to deploy a new ActionPack within an already deployed Learning Set.

How to Edit or Complete a Strategy

A launch strategy may be edited, completed, or deleted. **Once the Complete Strategy button is selected, that strategy can no longer be updated. It will be marked as completed, and no further deployments or assignments may be added to it.**



PROTIP Click the More icon . . . next to a strategy on the main Launchpad page to view, edit, duplicate, or delete it. If you delete a strategy, all the 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.

What are Shareable Links?

Shareable links – also known as deep links – are direct links to content that has already been deployed to end-users. Sharing a direct link to a specific resource would allow your team members to access it immediately. Shareable links may be generated for the following resources: **Deployments in the Launchpad, Learning Sets and ActionPacks in the Learn tool, and Collections and Resources in the Resources tool.** *Shareable links are behind a Feature Flag, so all client domains will not have this feature enabled by default.

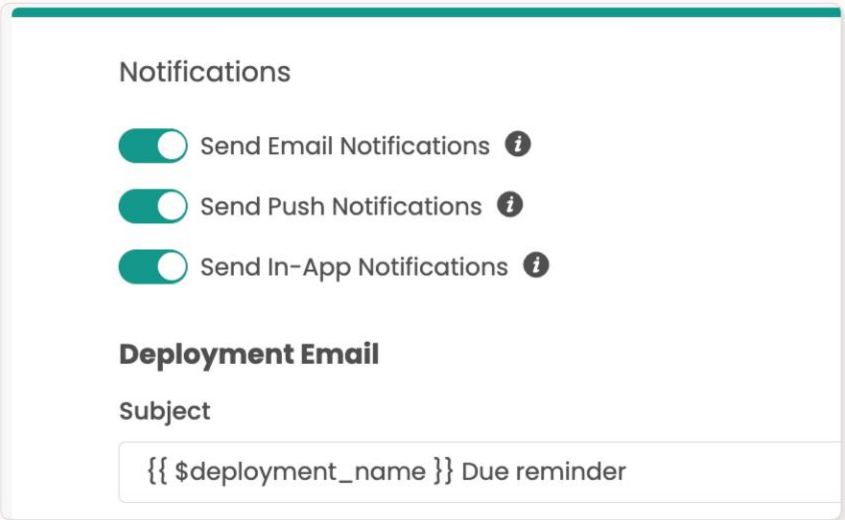
How to Generate Shareable Links for Deployments

You may copy a link to an individual deployment by clicking the **More icon** on the right of the deployment and then 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		

How to Send Deployment Notifications

You may manage/customize notifications for deployments. This is found in a deployment wizard under **Notifications**. This allows the enabling or disabling of email, push, or in-app notifications on a deployment level.



Send Email Notifications
Allows administrators to decide if learners need an email notification associated with the deployment. The email may be customized.

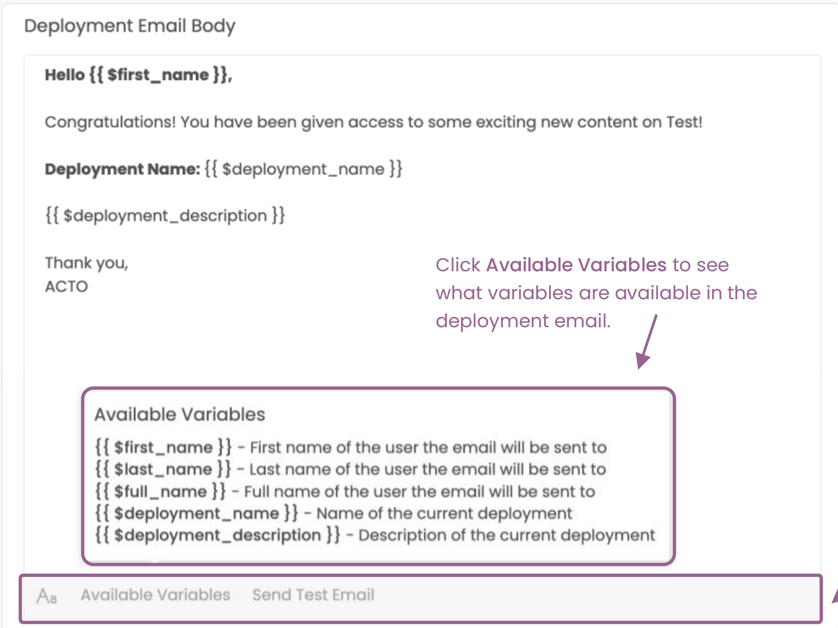
Send Push Notifications
This allows administrators to decide if learners need a push notification associated with the deployment on their iOS or android device.

Send in-App Notifications
This allows administrators to decide if learners need an in app notification associated with the deployment.

PROTIP If you enable **Send Email Notifications, this** opens up a deployment email text box allowing you to customize the default email that learners will receive for the specific deployment.

How to Customize Deployment Emails

When you enable email notifications for a deployment, you can customize the email that users receive. This allows administrators to change the default deployment email message according to their needs. This feature is found in the deployment wizard under **Notifications** page when setting up a new deployment.



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 back** to Admin Guide to Launchpad Table of Contents]

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

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

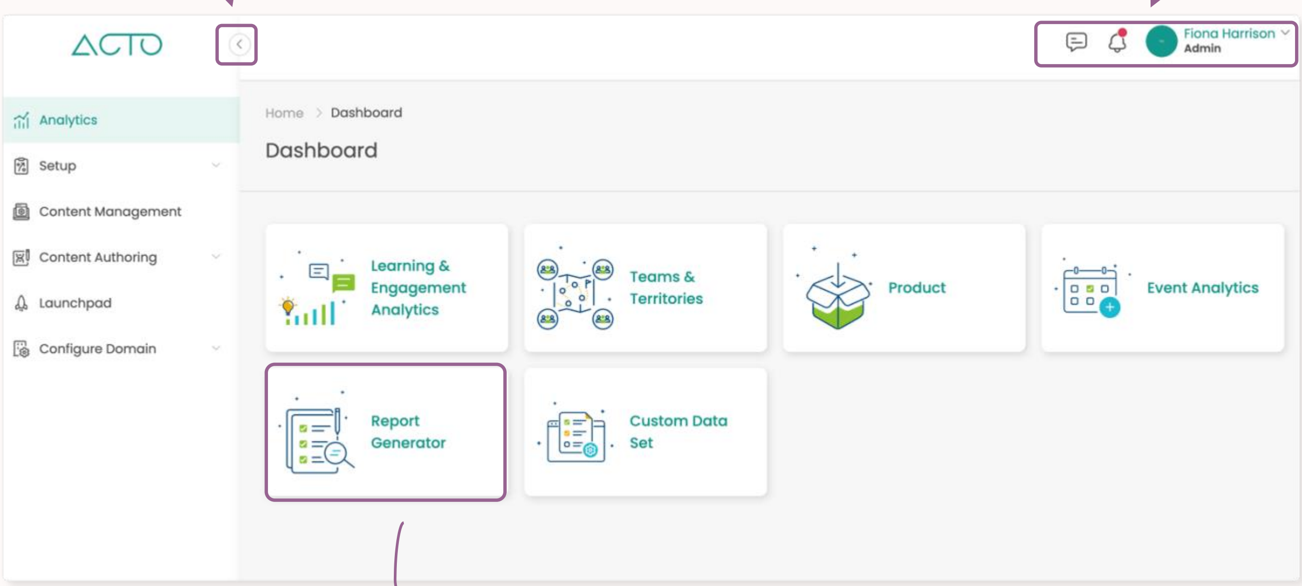
How to Access the Report Generator

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.

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 Analytics. Select Report Generator

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 **Analytics** and then select the **Report Generator** tab.

The Report Generator Quick Overview

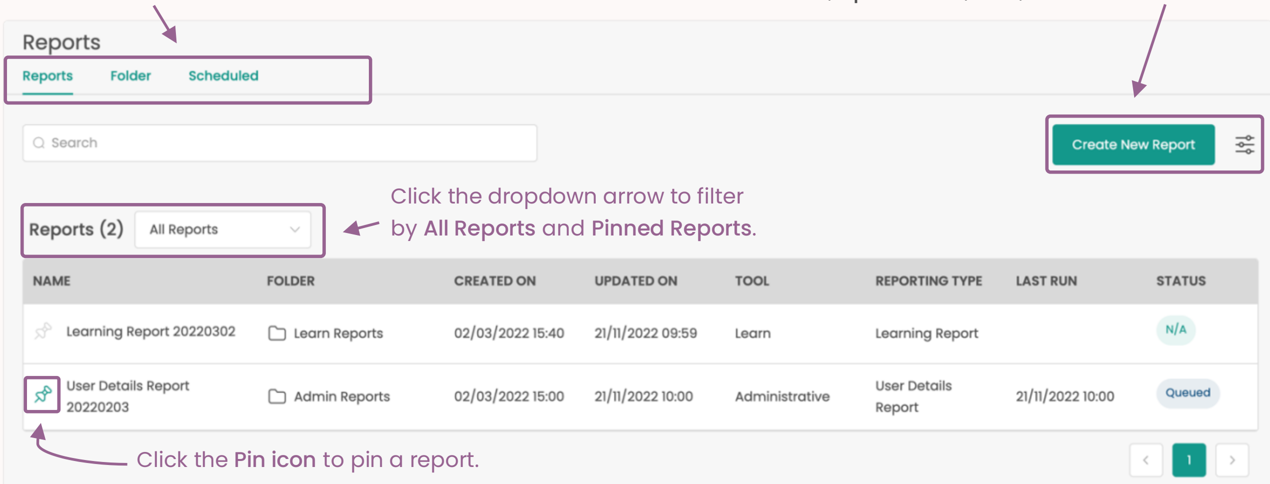
- The Report Generator allows you to **generate and download** custom reports. These reports may be generated for data within the **Learn**, **Resources**, and **Coach** tools.
- You may **customize** column names in your reports to ensure that they align with your organization's internal terms and language.
- 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.**



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.

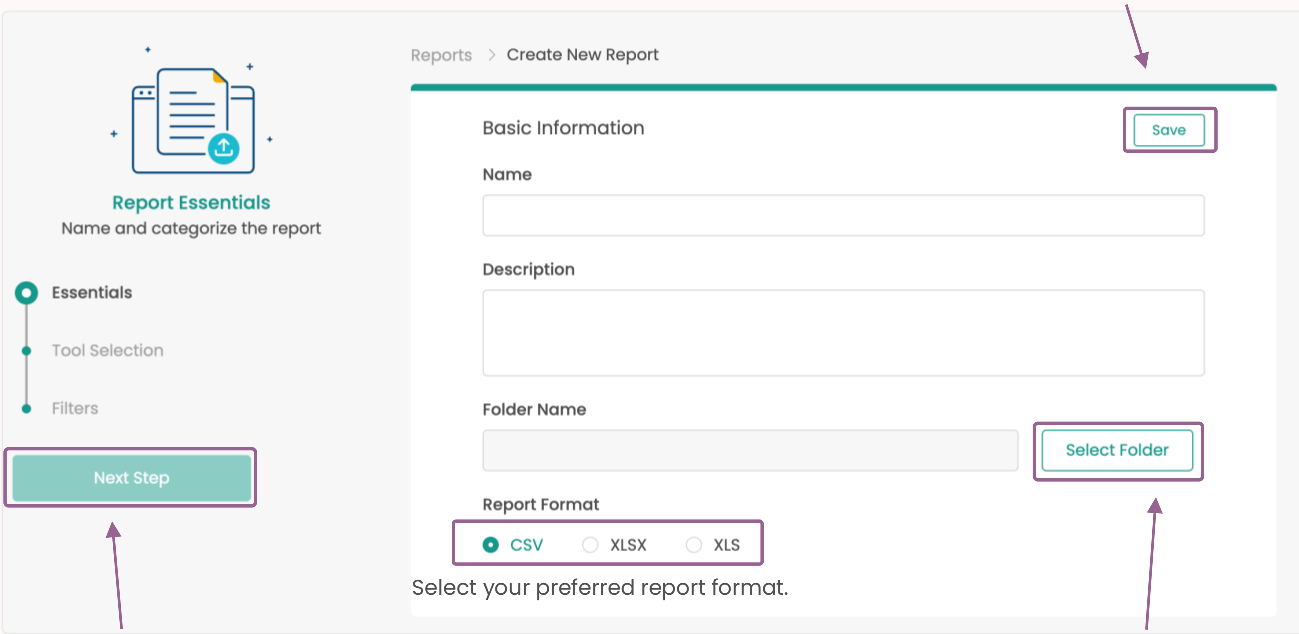
PROTIP Before creating a new report, please click **Folder** from the Reports Homepage. Create the folder(s) that will house and organize your reports. When creating a new report, you will need to select the folder it lives in.

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.

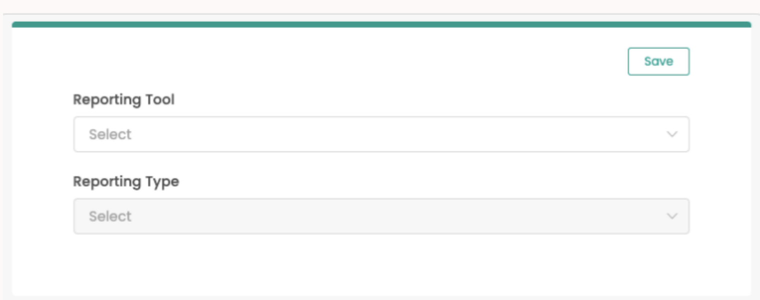


Click Next Step from the left-hand menu to move on to the next section of the wizard.

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.

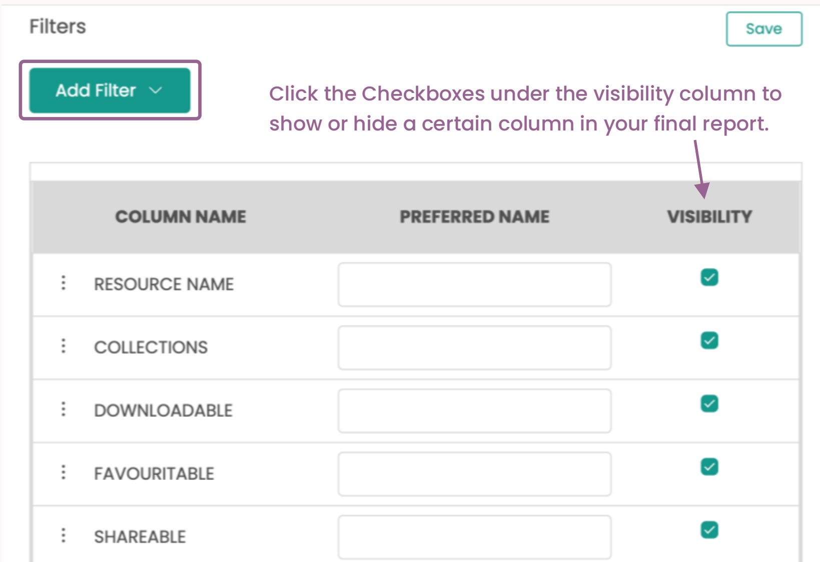
2. How to Create a New Report: Tool Selection Section



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.**



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.

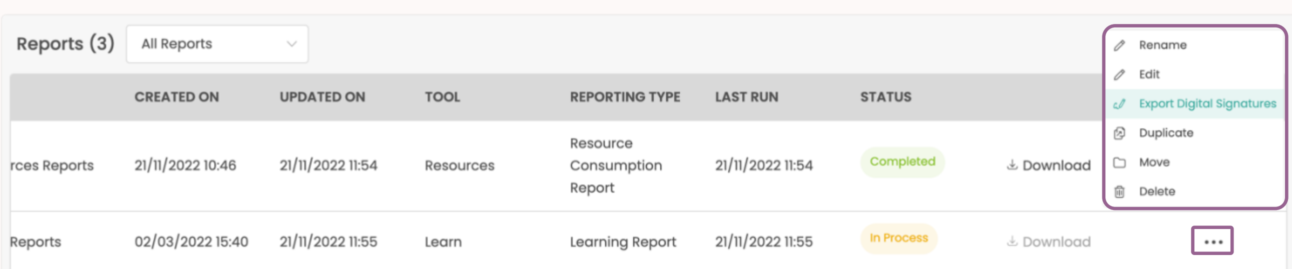
Rename Columns - You may rename columns to your preferred nomenclature.

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.

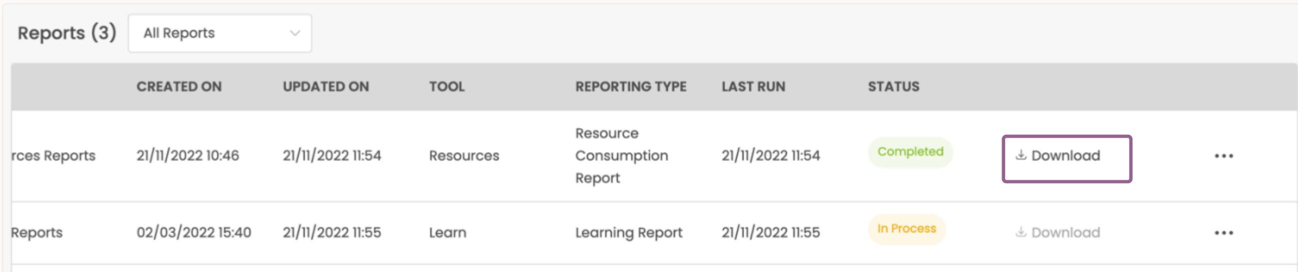
How to Export Digital Signatures from a Learning Report

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



How to Download a Report

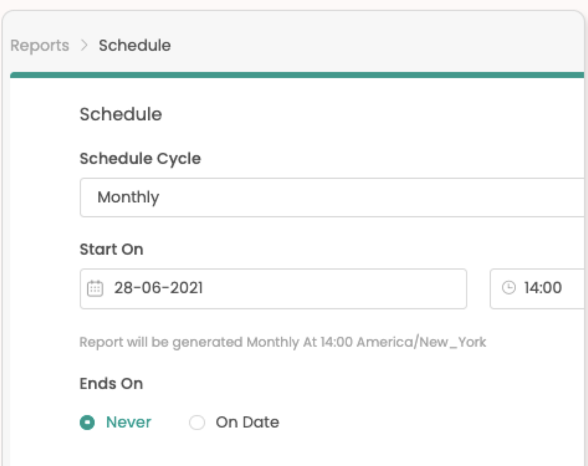
After running a report, you may request to download it from the main Reports page. Scroll to the right of the report you want to download, and click Download. You will receive a Notification on the top-right of the page once your report is ready. **Please note, a download link will also be sent directly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



PROTIP The **Status** column next to each 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 wizard.

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.



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 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 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

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. Prework 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 Comments

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

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.

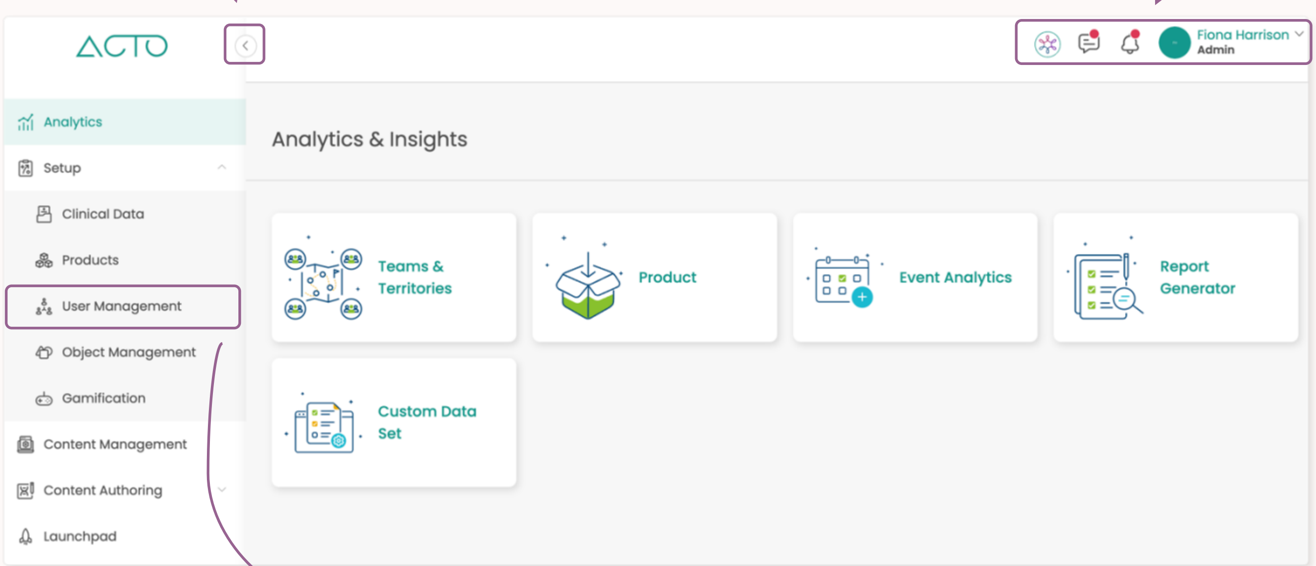
How to Access User Management

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.

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 into Setup. Then select User Management.

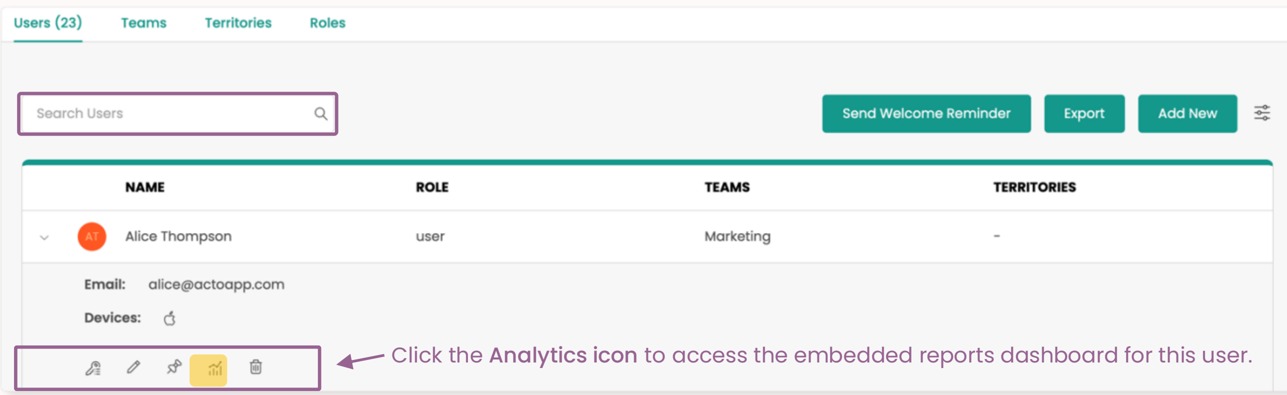
1. Log in to ACTO on your computer browser. **Please use Google Chrome or Mozilla Firefox.**
2. Make sure you are in administrative mode. <u>End-users cannot access admin functions.</u>
3. Expand the **Navigation menu** on the left of your screen.
4. Click **Setup** and then select the **User Management**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

Embedded Reports Quick Overview

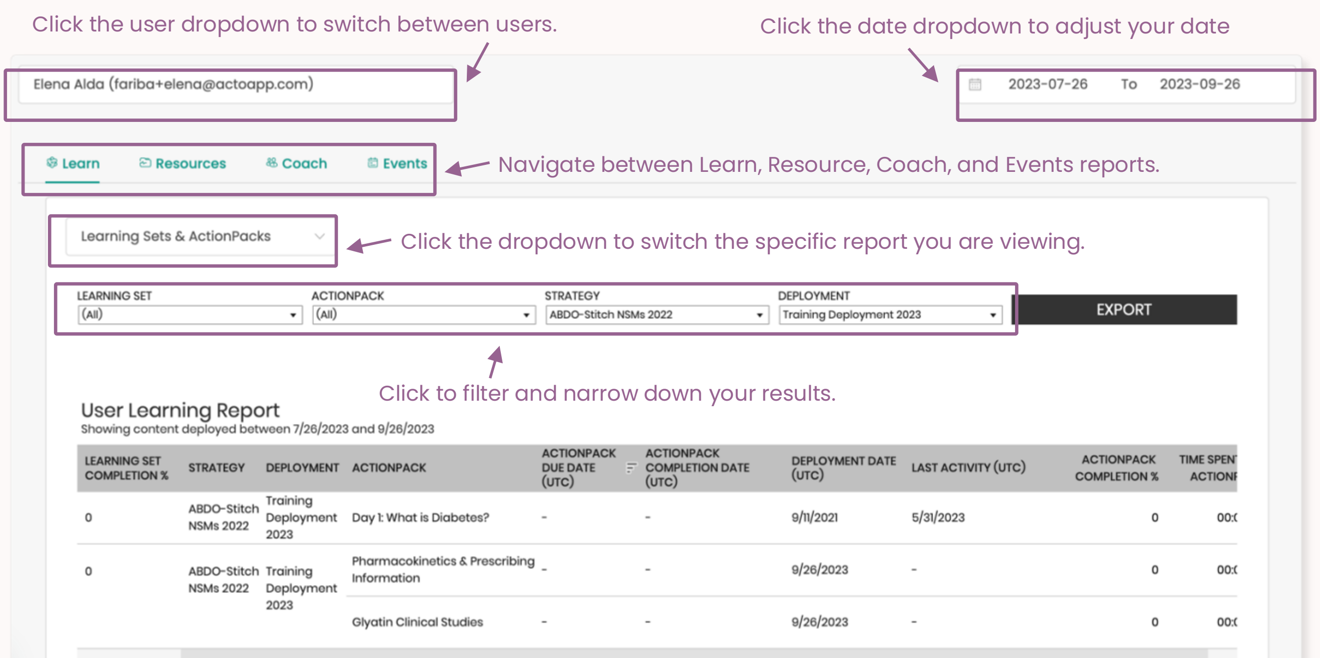
- Embedded Reports allow you to **generate and download** custom reports for users and teams. These reports may be generated for data within **Learn**, **Resources**, **Coach**, **Events**, and **Journeys.**
- Embedded can be accessed on an individual user and team level, and are found in the **User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

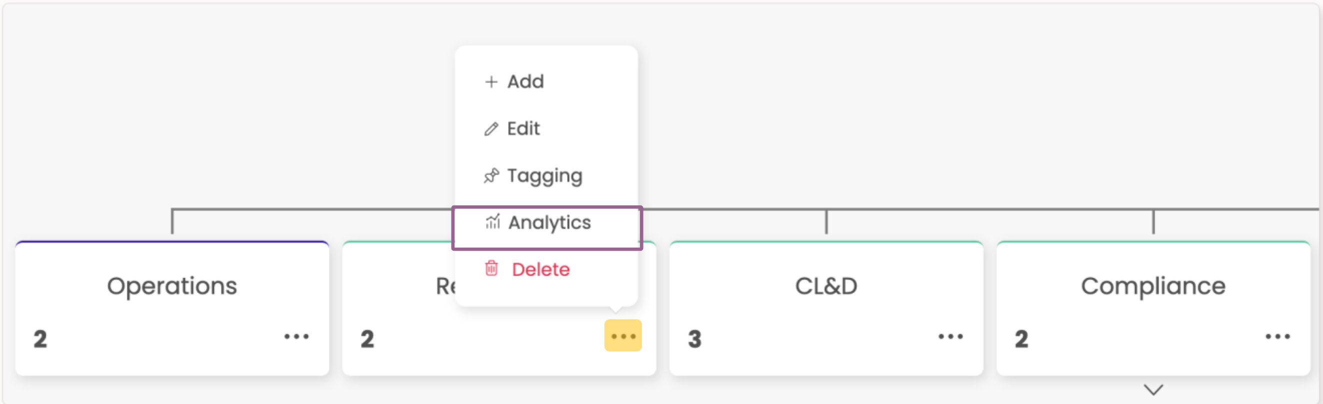


When you click into Analytics for any user, you will be taken to the page below. From here you can click between the **Learn**, **Resources**, **Coach**, and **Events** tabs to access the different available reports on a user level. Once you have navigated through the dropdown options, click Export to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



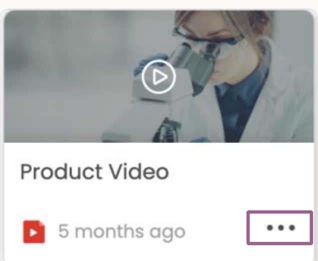
How to Access the Teams Analytics Dashboard

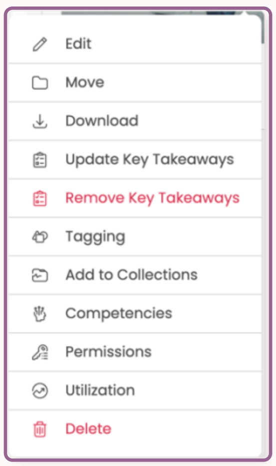
The Teams Analytics dashboard is similar to the User Analytics Dashboard, but it is accessed from the Teams page. Click into the User Management System, and then click into the **Teams** tab. Within teams, click the **More icon** (three dots) and then select **Analytics** to access the embedded reports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

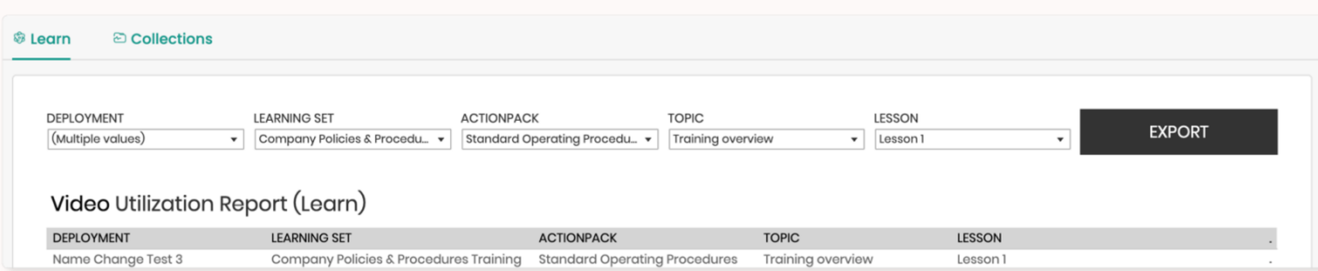




Click into **Content Management.**

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	✓	✓		✓	✓	
VILT						
Create	✓	✓		✓	✓	
User Management						
View	✓	✓	✓	✓		
Team						
Create	✓	✓	✓	✓		
Update	✓	✓	✓	✓		
Delete	✓	✓	✓	✓		
Territory						
Create	✓	✓	✓	✓		
Update	✓	✓	✓	✓		
Delete	✓	✓	✓	✓		
Role						
View	✓	✓				
Create	✓	✓				
Update	✓	✓				
Delete	✓	✓				
User						
Create	✓	✓	✓	✓		
Update	✓	✓	✓	✓		
Delete	✓	✓	✓	✓		
Content Management						
View	✓	✓		✓	✓	
View All	✓	✓				

	Owner	Admin	Manager	Draft-Manager	Drafter	User
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	✓	✓	✓			
Object Management						
View	✓	✓				
Custom Field						
Create	✓	✓				
Update	✓	✓				
Delete	✓	✓				
Domain Setup						
View	✓	✓				
Analytics						
View	✓	✓	✓	✓	✓	
Report Generator						
View	✓	✓	✓	✓		
Products						

	Owner	Admin	Manager	Draft-Manager	Drafter	User
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 Omnichannel 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 **ACTO Omnichannel**.

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

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 Form Name	200
Content Management	Forms – FCR Form Description w/Rich Text Support	5,000
Content Management	Forms – Field Coaching Form Question & Answer	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 Name	250
Learn	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	Scenario Name	200
Coach	Scenario Description	5,000
Coach	Certification Name	200
Coach	Certification Description	5,000
Events	Event Name	250
Events	Event Description	500

Supported Languages

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

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

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